**Oracle® TeleSales**

Implementation Guide

Release 12.1

**Part No. E13447-02**

April 2009

ORACLE®

Oracle TeleSales Implementation Guide, Release 12.1

Part No. E13447-02

# Contents

## A   System Profile Options

## B   Concurrent Programs

## C   Lookups

## Index

# Send Us Your Comments

**Oracle TeleSales Implementation Guide, Release 12.1**

**Part No. E13447-02**

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?
- Did you find any errors in the information?
- Does the structure of the information help you with your tasks?
- Do you need different information or graphics? If so, where, and in what format?
- Are the examples correct? Do you need more examples?

If you find any errors or have any other suggestions for improvement, then please tell us your name, the name of the company who has licensed our products, the title and part number of the documentation and the chapter, section, and page number (if available).

Note: Before sending us your comments, you might like to check that you have the latest version of the document and if any concerns are already addressed. To do this, access the new Applications Release Online Documentation CD available on My Oracle Support and www.oracle.com. It contains the most current Documentation Library plus all documents revised or released recently.

Send your comments to us using the electronic mail address: appsdoc_us@oracle.com

Please give your name, address, electronic mail address, and telephone number (optional).

If you need assistance with Oracle software, then please contact your support representative or Oracle Support Services.

If you require training or instruction in using Oracle software, then please contact your Oracle local office and inquire about our Oracle University offerings. A list of Oracle offices is available on our Web site at www.oracle.com.

# Preface

## Intended Audience

Welcome to Release 12.1 of the *Oracle TeleSales Implementation Guide.*

This document is intended for implementers for Oracle TeleSales.

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

- The principles and customary practices of your business area

- The Oracle TeleSales application

- Oracle Forms Applications

  To learn more about Oracle Forms Applications, read the *Oracle Applications User Interface Standards for Forms-Based Products* guide.

- The Oracle Applications graphical user interface

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

## TTY Relay Access to Oracle Support Services

To reach AT&T Customer Assistants, dial 711 or 1.800.855.2880. An AT&T Customer Assistant will relay information between the customer and Oracle Support Services at 1.800.223.1711. Complete instructions for using the AT&T relay services are available at http://www.consumer.att.com/relay/tty/standard2.html. After the AT&T Customer Assistant contacts Oracle Support Services, an Oracle Support Services engineer will handle technical issues and provide customer support according to the Oracle service request process.

# Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible to all users, including users that are disabled. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Accessibility standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For more information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.

## Accessibility of Code Examples in Documentation

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

## Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle does not own or control. Oracle neither evaluates nor makes any representations regarding the accessibility of these Web sites.

# Structure

# Related Information Sources

## 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.

## Online Documentation

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

- **PDF** - PDF documentation is available for download from the Oracle Technology Network at http://otn.oracle.com/documentation.

- **Online Help** - Online help patches (HTML) are available on My Oracle Support.

- **About Documents and Release Notes** - Refer to the About Document or Release Notes for the mini-pack or family pack that you have installed to learn about new documentation or documentation patches that you can download. About Documents and Release Notes are available on My Oracle Support.

- **My Oracle Support Knowledge tab** - The My Oracle Support Knowledge tab lets you browse the knowledge base by technology, industry, integration, application, documentation, training, and services, to find all documents for a product area. Use the Knowledge Home to search for release-specific information, such as FAQs, recent patches, alerts, white papers, troubleshooting tips, and other archived documents.

- **Oracle E-Business Suite Electronic Technical Reference Manuals -** Each Electronic Technical 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 and integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on My Oracle Support as part of Online Documentation.

## 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) of an Oracle Applications product. This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent programs.

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

## Guides Related to This Product

### Oracle Advanced Inbound Telephony Implementation Guide

Oracle Advanced Inbound Telephony enables telesales and teleservice agents and collectors to route, queue, and distribute callbacks for customer calls received over the phone and the web. It enables computer telephony integration to third-party telephony platforms. You can also transfer or conference a call and its application data from one agent to another.

### Oracle Advanced Outbound Telephony Implementation Guide

Oracle Advanced Outbound Telephony provides multiple automated dialing methods and extensive list management controls that improve the penetration and efficiency of outbound calling campaigns and maximize the productivity of interaction center agents. It integrates with Oracle Customer Interaction History to provide feedback that marketing professionals can use to analyze and measure the success of the marketing campaign.

### Oracle General Ledger Implementation Guide

This guide provides information on how to implement Oracle General Ledger. Use this guide to understand the implementation steps required for application use, including how to set up Accounting Flexfields, Accounts, and Calendars.

### Oracle Inventory User's Guide

This guide enables you to configure the Oracle Inventory structure to best represent your company's inventory sites and business units after you have defined your required ledger and key flexfields. You can also learn about centralized and decentralized inventory structures, and controls and reference options for using and maintaining inventory items such as categories, commodity codes, attributes, statuses, relationships, and picking rules.

### Oracle Leads Management Implementation and Administration Guide

Oracle Leads Management enables you to capture, evaluate, and distribute the leads generated by marketing activities for sales follow-up. It provides solutions to automate and optimize prospect-to-sales conversion across the enterprise.

### Oracle Marketing Implementation Guide

Oracle Marketing provides the tools necessary to automate the planning, budgeting, execution, and tracking of your marketing initiatives. It provides a single repository of customer information that enables you to analyze, personalize, refine, and target your campaigns to better align with sales. You can set up fatigue rules to define contact limits by time period and by channel.

### Oracle One-to-One Fulfillment Implementation Guide

Oracle One-to-One Fulfillment provides Oracle E-Business Suite applications with a centralized mechanism for compiling and distributing information to customers. E-Business Suite applications use the Oracle One-to-One Fulfillment API to compile the personalized content for the fulfillment request and determine the recipients of this content. The content can be cover letters, collateral, or templates with associated queries.

### Oracle Partner Management Partner User Guide

This guide describes how partners can use the partner dashboard to enroll in programs, access the vendor library, manage membership and renewals, register deals, submit referrals, request marketing funds, and view the status of claims.

### Oracle Partner Management Vendor User Guide

This guide describes how vendors can use the Channel Manager dashboard to manage channel partners, partner activities and programs, partner profiles, and partner performance. Partner activities include training and managing funds, opportunities, referral compensation, and deals.

### Oracle Proposals Implementation Guide

Oracle Proposals enables sales representatives to generate proposals in the field from templates created and published by sales administrators. This guide describes how to set up different proposal users, and install and integrate with the applications that you need to create and maintain proposals such as Oracle Sales, Oracle Telesales, Oracle Quoting, Oracle Marketing, Oracle Content Manager, and Oracle Trading Community Architecture.

### Oracle Receivables User Guide

This guide provides you with information on how to use Oracle Receivables. Use this guide to learn how to create and maintain transactions and bills receivable, enter and apply receipts, enter customer information, and manage revenue. This guide also includes information about accounting in Receivables. Use the Standard Navigation Paths appendix to find out how to access each Receivables window.

### Oracle Sales Implementation Guide

This guide enables you to set up users, user groups, and roles, define forecast categories that group products and services to be included in a forecast, set up and enable currency conversion, and set up the sales dashboard linking the sales funnel to sales stages of a sales methodology. You can also set up Oracle Sales and Oracle Telesales interoperabiliy and set up Oracle Sales for integration with Oracle Territory Manager, Oracle Marketing, Oracle Quoting, Oracle Proposals, Oracle Trade Management, Oracle Partner Management, and Oracle Incentive Compensation.

### Oracle TeleSales User Guide

Oracle TeleSales enables telesales agents manage the sales cycle, from prospects to booked orders. It offers a multi-channel selling solution that leverages all sales channels: whether selling over the phone, through the web or through mobile devices. Its E-Business Center offers a cross-application desktop for all Oracle call center applications, and provides elements of Service and Collections for a comprehensive customer view. You can use Oracle TeleSales for comprehensive customer management, list generation, lead, opportunity, and pipeline management, quote and order generation, event registration and collateral fulfillment.

### Oracle Trading Community Architecture Administration Guide

This guide enables you to define entities in the TCA Registry, create relationships, search, prevent duplication, and control access. In addtion, you can use this guide to define time zones and phone formats, configure adapters for the processing of data in the TCA Registry, define sources that provide data for specific entities, and create user-defined attributes to extend the registry. You can administer these TCA tools and features from the Administration tab using the Trading Community Manager responsibility. This tab is also available in Oracle Customers Online and Oracle Customer Data Librarian.

### Oracle Trading Community Architecture User Guide

Oracle Trading Community Architecture (TCA) maintains information including relationships about parties, customers, organizations, and locations that belong to your commercial community in the TCA Registry. This guide enables you to use the features and user interfaces provided by TCA and by other Oracle E-Business Suite applications to view, create, and update Registry information. For example, you can import batches of party data in bulk from external source systems into the TCA Registry, merge duplicate parties, sites, and customer accounts, generate time zones for phones and locations, and run various customer reports.

### Oracle Universal Work Queue Implementation Guide

Oracle Universal Work Queue supports queued, prioritized distribution and delivery of work, and work methods. It enables agents to access application work from a queue, initiate their real-time session and connect with their assigned media providers. It supplements Oracle Interaction History information to create a complete picture of agents' sessions. This guide describes how to implement Oracle Universal Work Queue and integrate with Oracle E-Business Suite applications.

## Installation and System Administration

### Oracle Applications Concepts

This book is intended for all those planning to deploy Oracle E-Business Suite Release

12, or contemplating significant changes to a configuration. After describing the Oracle Applications architecture and technology stack, it focuses on strategic topics, giving a broad outline of the actions needed to achieve a particular goal, plus the installation and configuration choices that may be available.

## Oracle Applications Installation Guide: Using Rapid Install

This book is intended for use by anyone who is responsible for installing or upgrading Oracle Applications. It provides instructions for running Rapid Install either to carry out a fresh installation of Oracle Applications Release 12, or as part of an upgrade from Release 11*i* to Release 12. The book also describes the steps needed to install the technology stack components only, for the special situations where this is applicable.

## Oracle Applications Maintenance Utilities

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

## Oracle Alert User's Guide

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

## Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer forms so that they integrate with Oracle Applications. In addition, this guide has information for customizations in features such as concurrent programs, flexfields, messages, and logging.

## 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 tells you how to apply this UI to the design of an application built by using Oracle Forms.

## Other Implementation Documentation

### Oracle Workflow Administrator's Guide

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

### Oracle Workflow Developer's Guide

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

### Oracle Workflow User's Guide

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

### Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Projects 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 E-Business Suite Diagnostics User's Guide

This guide contains information on implementing, administering, and developing diagnostics tests in the Oracle E-Business Diagnostics framework.

### Oracle E-Business Suite Integrated SOA Gateway Implementation Guide

This guide explains the details of how integration repository administrators can manage and administer the entire service enablement process based on the service-oriented architecture (SOA) for both native packaged public integration interfaces and composite services - BPEL type. It also describes how to invoke Web services from Oracle E-Business Suite by working with Oracle Workflow Business Event System, manage Web service security, and monitor SOAP messages.

### Oracle E-Business Suite Integrated SOA Gateway User's Guide

This guide describes how users can browse and view the integration interface definitions and services that reside in Oracle Integration Repository.

## Training and Support

### Training

Oracle offers a complete set of training courses to help you master your product 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 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 your product 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.

# 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.

# 1

## Introduction to Oracle TeleSales

This chapter covers the following topics:

- Overview

## Overview

Oracle TeleSales is an application designed for inside sales professionals, whether they are inbound telesales or outbound telemarketing agents. Oracle TeleSales provides a versatile set of tools to help the inside sales team manage the sales cycle - from prospecting to booking orders. Key functions include comprehensive customer management, list generation, lead, opportunity, and pipeline management, quote and order generation, event registration and collateral fulfillment. Oracle TeleSales offers a true multi-channel selling solution that leverages all sales channels: whether selling over the phone, through the web or through mobile devices. Integration with other eBusiness Suite applications further extends Oracle TeleSales functionality.

**Oracle Collections**

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

**Oracle Contracts**

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

**Oracle Install Base**

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

**Oracle Interaction Center**

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

**Oracle iStore**

Oracle iStore provides interactive selling on the web.

**Oracle Marketing**

Oracle Marketing provides a closed-loop marketing solution from campaign to cash.

**Oracle Order Management**

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

**Oracle Quoting**

Oracle Quoting provides the ability to create quotes.

**Oracle Proposals**

Oracle Proposals provides the ability to create proposals.

**Oracle Sales**

Oracle Sales provides visibility into the sales cycle, enabling sales representatives to manage effective selling activities.

**Oracle TeleService**

Oracle TeleService provides service request management for resolving customer issues. It enables agents to receive automatic alerts about customers through the use of Relationship Plans. Using this functionality, the eBusiness Center provides a view of a party's service requests and the ability to view details for a service request.

**Oracle Receivables**

Oracle Receivables manages day–to–day Accounts Receivable operations, including receipt–related tasks, invoices, debit memos, credit memos, on–account credits, chargebacks, adjustments, collections, and bills receivable.

**Oracle Territory Manager**

Oracle Territory Management assigns business objects (customers, opportunities, and leads, for example) to resources based on configured business rules.

**Oracle Trading Community Architecture**

Oracle Trading Community Architecture (TCA) is a data model that enables the management of information about the parties, or customers, who belong to the commercial community, including organizations, locations, and the network of hierarchical relationships among them.

# 2

# Dependencies and Integration Points

This chapter covers the following topics:

- Mandatory Dependencies
- Optional Integrations

## Mandatory Dependencies

The following table lists the mandatory dependencies for Oracle TeleSales.

At minimum, the modules Resource Manager, Task Manager, and Notes must be implemented. You must set up in full any dependent licensed applications you have purchased. If you have not purchased a license, then you must only set the application up to the extent allowed by the shared license which comes free of charge with your application. For example, if your organization has not purchased a license to use Oracle Inventory or Oracle Receivables applications, then you need only set up the limited components of these applications which are available free of charge.

- Core Sales

- Resource Manager

- Task Manager

- Notes

- General Ledger

- HRMS

- Trading Community Architecture

# Optional Integrations

The following table shows the integration points, also referred to as conditional dependencies, for Oracle sales applications.

- Accounts Receivable

- Bill of Materials

- Collections

- Configurator

- FulFillment

- Incentive Compensation

- Install Base

- Interaction Center

- Interaction History

- Inventory

- Marketing

- Order Capture

- Order Management

- Partners

- Proposals

- Quotes

- TeleService

- Territory Manager

- Universal Work Queue

# 3

# Implementation Overview

This chapter covers the following topics:

- Implementation Task Sequence Overview
- Implementation Task Sequence for Oracle TeleSales

## Implementation Task Sequence Overview

This section provides you with a checklist of implementation steps for Oracle TeleSales. Find more information about each step by clicking the hyperlink, or, for the printed and PDF versions, following the page reference.

## Implementation Task Sequence for Oracle TeleSales

The implementation steps for Oracle TeleSales are outlined in the table below. Print a copy of this list to use as a guide to the specific implementation steps detailed in the next chapter of this document. Since all steps are not mandatory, it might be helpful to identify the steps you must take before starting the process.

| Mandatory | Description |
| --- | --- |
| Yes | Create organization and locations, page 4-3 |
| Yes | Set up customer model, page 4-4 |
| No | Set up data quality management, page 4-4 |
| Yes | Setting up relationships, page 4-5 |
| Yes | Set up classifications for customers, page 4-5 |

| Mandatory | Description |
| --- | --- |
| Yes | Set up global address formatting, page 4-6 |
| No | Set up address validation, page 4-8 |
| Yes | Create employee, page 4-8 |
| Yes | Set up users, security, and reporting hierarchy, page 4-9 |
| | Review factors that affect security, page 4-10 |
| | Review effects of security related profile options, page 4-15 |
| | Review sample security setups, page 4-26 |
| | Define resource groups, page 4-28 |
| | Define responsibilities, page 4-31 |
| | Set up employees as users, page 4-31 |
| | Import employees and assign roles and resource groups, page 4-32 |
| | Set up system profile options, page 4-34 |
| | Set up default user role and sales group, page 4-35 |
| Yes | Set up lead management, page 4-36 |
| No | Import leads, page 4-36 |
| Yes | Set up opportunities and forecasting, page 4-36 |
| | Set up opportunity profiles, page 4-37 |
| | Create win probabilities, page 4-39 |
| | Define or modify sales stages, page 4-39 |
| | Set up sales methodology, page 4-39 |
| | Set up opportunity status, page 4-40 |
| | Set up product catalog, page 4-40 |
| | Set up plan element mapping, page 4-41 |
| Yes | Set up forecast categories, page 4-42 |
| Yes | Set up forecast category mappings, page 4-43 |

| Mandatory | Description |
| --- | --- |
| No | Set up multiple currencies, page 4-45 |
|  | Set up currency codes, page 4-46 |
|  | Set up calendar types, page 4-46 |
|  | Set up accounting calendar, page 4-47 |
|  | Set up type mapping, page 4-47 |
|  | Set up reporting currency mapping, page 4-47 |
|  | Enter GL daily conversion rates, page 4-48 (Only if more than one currency is used) |
|  | Run concurrent programs, page 4-48 for multiple currencies |
| No | Set up quoting, page 4-49 |
| No | Set up flexfields, page 4-49 |
| No | Set up notes, page 4-50 |
|  | Set up interaction tracking, page 4-51 |
|  | Set up tasks, page 4-51 |
|  | Set up calendar, page 4-51 |
|  | Set up fulfillment, page 4-52 |
| No | Set up territories, page 4-52 |
|  | Set up and use territory assignment program, page 4-53 |
| No | Set up partners, page 4-86 |
| No | Set up marketing source codes, page 4-86 |
| No | Set up Incentive Compensation, page 4-87 |
| No | Set up competitor information, page 4-87 |
| No | Set up the profile option for Quick Menu, page 4-87 |
| No | Customize the interface by setting default tabs and hiding tabs, page 4-88 |

| Mandatory | Description |
|---|---|
| No | Set up custom tabs, page 4-92 |
| No | Set up the ability to launch HTML-based applications, page 4-94 |
| No | Set up the ability of agents to view maps for addresses through integration with a mapping application, page 4-94 |
| Yes | Set up the Universal Work Queue, page 4-95 |
| No | Set up marketing events using Oracle Marketing, page 4-100 |
| No | Set up marketing collateral, page 4-101 |
| No | Set up class types, page 4-104 |
| No | Set up class codes, page 4-105 |
| No | Set up scripting, page 4-106 |
| No | Enable multi-organizational access, page 4-107 |
| No | Set up call center applications, page 4-108 |
| No | Set up direct telephony integration, page 4-109 |
| No | Assign campaigns to agents, page 4-112 |
| No | Set up eMail Center, page 4-114 |
| No | Enable interaction tracking and set up automatic interaction tracking and wrap-up, page 4-114. |
| No | Enable web directory assistance, page 4-123 |
| No | Set up relationship plan, page 4-125 |
| No | Set up the dashboard, page 4-125 |
| No | Set up the At a Glance window, page 4-126 |

| Mandatory | Description |
| --- | --- |
| No | Set up Web Collaboration, page 4-133 |
| No | Setting up opportunity forecasting, page 4-133 |
| No | Set up integration with Oracle Order Management, page 4-135 |
| No | Set up integration with Contracts, page 4-136 |
| No | Set up business events, page 4-137 |
| No | Use diagnostics, page 4-152 |

# 4

# Implementation Tasks for Oracle TeleSales

This chapter covers the following topics:

- Setting Up Organizations
- Setting Up the Customer Model
- Setting Up Data Quality Management
- Setting up Relationships
- Setting Up Customer Classifications
- Setting Up Global Address Formatting
- Validating Addresses
- Creating Employees
- Setting Up Users, Security, and Reporting Hierarchy
- Defining Resource Groups
- Defining Responsibilities
- Setting Up Employees as Users
- Importing Employees and Assigning Roles and Resource Groups
- Setting Up System Profile Options to Give Users Access
- Setting Up Default User Role and Sales Group
- Setting Up Lead Management
- Importing Leads
- Setting Up Opportunities and Forecasting
- Setting Up Opportunity Profiles
- Creating Win Probabilities
- Setting Up Sales Stages
- Setting Up Sales Methodologies

- Creating and Modifying Status Codes

- Setting Up the Product Catalog

- Setting Up Plan Element Mapping

- Setting Up Forecast Categories

- Setting Up Forecast Category Mappings

- Setting Up Forecast Defaults

- Setting Up Multiple Currencies

- Setting Up Currency Codes

- Setting Up Calendar Types

- Setting Up the Accounting Calendar

- Setting Up Period Type Mapping

- Setting Up Reporting Currency

- Entering GL Daily Conversion Rates

- Run Concurrent Programs for Multiple Currency

- Setting Up Quoting

- Setting Up Flexfields

- Setting Up Notes

- Setting Up Interaction Tracking

- Setting Up Tasks

- Setting Up Calendar

- Setting Up Fulfillment

- Setting Up Territories

- Setting Up and Using Territory Assignment Program (TAP)

- Setting Up Partners

- Setting Up Marketing Source Codes

- Setting Up Incentive Compensation

- Setting Up Competitor Information

- Setting Up Quick Menu

- Hiding and Setting Default Tabs

- Setting Up Custom Tabs

- Setting Up Forms Integration with HTML-based Applications

- Setting Up Mapping Capability for Addresses in eBusiness Center

- Setting Up the Universal Work Queue

- Setting Up Marketing Events

- Setting Up Marketing Collateral

- Setting Up Class Types

- Setting Up Class Codes

- Setting Up Scripting

- Enabling Multi-Organization Access

- Setting Up Call Center and Advanced Outbound and Advanced Inbound

- Setting Up Direct Telephony Integration

- Setting Up Campaign Assignments

- Enabling Oracle Email Center

- Enabling Interaction Tracking and Wrap-up

- Enabling Web Directory Assistance

- Setting Up Relationship Plan

- Setting Up the Dashboard

- Setting Up the At A Glance Window

- Setting Up Web Collaboration

- Setting Up Opportunity Forecasting

- Integrating with Oracle Order Management

- Integrating with Oracle Contracts Modules

- Setting Up Business Event Notification

- Using Diagnostics

## Setting Up Organizations

**Responsibility**

US HRMS Manager

**Navigation**

HRMS Setup > Organization

Organizations are the basic work structure of an enterprise. They represent the functional management or reporting groups which exist within a business group, and control how financial transactions are posted. Set up organizations in Oracle HRMS to record the physical locations of your employees and all the departments in your enterprise. You must define at least one organization for your company. However, since an organization is seeded out-of-the-box, this step becomes optional. Although there are

several different types of organizations, each of which require specific set up steps, the full functionality of the applications might not be available until this step is complete.

Organizations can also help you set up security for your sales applications. For example, you can attach responsibilities with different levels of security to the different operating units you set up as organizations. Any individuals employed in those units automatically inherit that responsibility.

For more information about security, refer to "Setting Up Users, Security, and Reporting Hierarchy", page 4-9.

# Setting Up the Customer Model

The customer model is used by sales representatives to track information about their customers, prospects, and contacts. Information such as phone numbers and addresses, as well as customer and contact profile information, and a history of transactions and interactions are tracked in the customer model. The customer model is designed to work with the Oracle Trading Community Architecture (TCA). TCA holds a single customer record which is used across all modules in the E-Business Suite.

Add new customer categories for use when creating new customers by following the instructions in the "Customers" chapter of the *Oracle Receivables User Guide*.

# Setting Up Data Quality Management

Data quality management is part of the customer model that works with the Oracle Trading Community Architecture (TCA).

This feature includes Smart Search and duplicate prevention. Smart Search is used when performing a search for an object. Duplicate prevention uses matching rules to determine whether the object being created is a duplicate of an existing object. The matching process uses transformation rules to take an object and turn it into a matchable entity. After the transformation rules are performed, the application tells the user if the object is a possible duplicate.

To set up Smart Search:

- Establish transformation rules and set the profile options HZ: Match Rule for Organization Advanced Search, HZ: Match Rule for Person Advanced Search, and HZ: Match Rule for Contact Advanced Search.

- Enable Smart Search by setting the profile option HZ: Enable DQM Party Search. If set to Yes, the Smart Search option is available in the drop down list of the Universal Search. Also available are the Organization, Person, and Relationship searches. If set to No, Smart Search is not available in the drop down list.

Duplicate prevention is available for the Quick Search for organization, person, and party relationship, but not for Expanded Search. In TeleSales duplicate prevention is used for the fields Organization Name, First Name, and Last Name. To set up duplicate

prevention you must:

- Establishing match rules and setting the profile options OS: Match Rule for Contact Simple Search, HZ: Match Rule for Person Simple Search, and HZ: Match Rule for Organization Simple Search. If the value of these profiles is "Null", then the search is an exact search. If the profile has a match rule value, then the quick find includes duplicate prevention.

- Use the profile option HZ: Enable Duplicate Prevention at Party Creation to turn this feature on or off. If set to Yes, the duplicate prevention is turned on.

> **Note:** Data Quality Management security ensures the display and access only of records within a user's territory.

# Setting up Relationships

**Responsibility**

Trading Community Manager

**Navigation**

Trading Community > Administration > Relationships

Oracle sales applications come configured to capture both business and personal relationships between any parties in the database and between outside parties and your internal organizations.

Refer to the *Oracle Trading Community Architecture Administration Guide* for details.

# 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.

# Setting Up Global Address Formatting

To ensure that your customer quotes and invoices include the proper tax information, you must set up addresses in Oracle Receivables under the Receivables Manager responsibility.

You must complete the steps in the "Flexible Address" section of the "Customers" chapter of the *Oracle Receivables User Guide.* The differences between the Oracle Receivables setups and the setup for sales applications are outlined below.

- Oracle applications let you enter customer addresses in country–specific formats. For example, if you have customers in Germany, you can enter German addresses in the format recommended by the Bundespost, or you can enter addresses for customers in the United Kingdom in the format recommended by the Royal Mail.

  Do this by using descriptive flexfields to enter and display address information in the appropriate formats. The flexfield window opens if the country you enter has a flexible address style assigned to it. This window enables you enter an address in the layout associated with that country. If there is no address style associated with the country, then the system uses the value in OS: Default Address Style instead of the standard form mentioned in the Oracle Receivables documentation.

- Setting up address validation in Oracle Trading Community Architecture ensures that the addresses entered into the database are in the correct format for country or region.

It is important to confirm that you have set up each country that you are doing business with to ensure that the proper address format can be used.

Use the following procedure to map address styles.

**Responsibility**

Oracle Sales Administrator

**Navigation**

Receivables Manager > Countries

## Steps:

1. Search for the countries that you want to set up using the Query/Enter Query/Run method.

2. Use the Address Style LOV to select the address style for each country.

3. Click **Save** on the toolbar.

## Differences Between Oracle Receivables and Oracle TeleSales Setups:

This section covers the differences between the setup required by Oracle TeleSales and those you must perform that are described the *Oracle Receivables User Guide*.

- Descriptive Flexfield details:

  DESCRIPTIVE FLEXFIELD NAME: Remit Address HZ

  Title: Address

  Application: Oracle Receivables

  Table: HZ_LOCATIONS

- Set the additional profile option OTS: Default Country for default country behavior
  .

- If there is no address style associated with a country, then sales applications use the setting of OS: Default Address Style as the default address style instead of the standard address format in Oracle Receivables. The seeded default value of this option is POSTAL_ADDR_US.

- Sales applications include the following additional address style in addition to the address styles provided by Oracle Receivables:

  Oracle Sales Default Address Style: POSTAL_ADDR_US (the default for the profile option OS: Default Address Style).

  The following table lists the columns for the POSTAL_ADDR_US style.

| Table Name | Database Column |
| --- | --- |
| HZ_LOCATIONS | ADDRESS1 |
| HZ_LOCATIONS | ADDRESS2 |
| HZ_LOCATIONS | ADDRESS3 |
| HZ_LOCATIONS | ADDRESS4 |
| HZ_LOCATIONS | STATE |
| HZ_LOCATIONS | COUNTY |
| HZ_LOCATIONS | CITY |

| Table Name | Database Column |
| --- | --- |
| HZ_LOCATIONS | POSTAL_CODE |

- The STATE segment uses the AS_LOC_STATE value set for the list of values. The list of values depends on the Sales Tax Location Flexfield setup in Oracle Receivables.

- Set the profile option OTS: Customer-Include Address Style In Concatenated Format for Oracle TeleSales: If set to Yes the address style name (such as US) appears in the Address field in front of the concatenated address. This applies to the eBusiness Center header and the Address/Phone tab.

- The columns you assign to the address columns are restricted to the address columns that have been predefined for the flexfield.

# Validating Addresses

The address validation checks for valid addresses when a user creates or updates an address. If the address is not valid, Oracle TeleSales prompts the user to provide a valid address.

**Responsibility**

System Administrator

**Navigation**

Oracle Sales Setup > System Profiles

Set the profile option OS: Perform Address Validation to Yes, and set HZ: Validate US Addresses to Error (the value Warning is not supported for Oracle TeleSales).

> **Note:** The profile OS: Default Address Style is set to POSTAL_ADDR_US by default.

# Creating Employees

Employees using Oracle TeleSales must be defined as a resources and application users. This includes employees, partners, and partner contacts.

Users who are employees must also be defined in Oracle HRMS as employees. Enter Employee in the Category field. Employee records can then be converted into resources, each of which must be assigned a role and a group in order to access the Sales applications.

The navigation paths for creating employees are different depending on whether you have a full license to Oracle HRMS or a shared license.

If you have the full installation of Oracle Human Resources, a module of Oracle HRMS, you must use HR and perform this step under the HRMS Manager responsibility.

## With Full Oracle HRMS License

If you are setting up employees in Oracle HRMS, then you must log in under a separate responsibility.

**Responsibility**

US HRMS Manager

If Oracle HRMS is not installed, use the CRM Resource Manager responsibility to create the employee.

**Navigation**

People > Enter and Maintain

**Steps**

1. Create an employee using this form. Use Employee as the category.

2. Click **Save**.

3. Additionally, click **Address** to enter an address.

4. Click **Save**.

# Setting Up Users, Security, and Reporting Hierarchy

Setting up users, security, and reporting hierarchy are all part of setting up the resources needed for the application. In this section you import the employees you have set up from Oracle Human Resources (HRMS), set them up as users, and define the roles, groups, and set profile options that control access to customer, lead, and opportunity information.

This topic gives you an overview of the factors that affect security and user setup for sales applications and then gives you detail on each setup step.

**Steps**

Follow these steps to set up users, security, and reporting hierarchy.

1. Replicate the reporting hierarchy within your sales organization using Resource Groups in Resource Manager. This determines how forecasting of opportunity information is aggregated. See Defining Resource Groups.

2. Create customer responsibilities. See Defining Responsibilities.

3. Set up employees as user of your application. See Setting Up Employees as Users.

4. Import the employees you have created, give them a role, and assign them to the resource groups you have created. See Importing Employees and Assigning Roles and Resource Groups.

5. Set up the system profile options which, in combination with the resource groups and roles, determine what information employees can view and modify.

## Factors That Affect Security

The ability to access, view, and update customer, lead, and opportunity information is determined by a combination of settings.

Responsibilities determine the menus and functions that are available to users within that responsibility. The Resource Manager setup of roles, groups, and hierarchies determines how opportunities are rolled up for reports and forecasting within the CRM sales family.

Sales teams can be built for either a consumer (a party of type Person) or an organization. A sales team is a set of salespersons who have been assigned manually or automatically using Territory Manager. The ability to access, view, or update a particular customer can be based on sales team membership.

Within sales applications, there are three main Roles: Administrator, Manager, and Agent/Representative. Roles further categorize the user's access to information.

A Resource Group is a set of employees within your organization. Groups can be organized into hierarchies that mirror the reporting structure of your sales organization.

### Responsibilities

Responsibilities enable users to access only those functions that are appropriate to their positions within a company. Responsibilities are associated with a menu, a hierarchical arrangement of application functions that define the range of functionality that is available to that responsibility. You can assign one or more responsibilities to each user.

Responsibilities enable users to access more than one operating unit at a time, so users can perform business tasks for entities across all accessible operating units while logged in under a single given responsibility. This enables users to perform tasks for any of the operating units to which they have access, such adding products to a lead or an opportunity. To enable new opportunities and orders to be accessed using the multiple operating unit functionality, you must set the profile options MO: Default Operating Unit and MO: Security Profile with valid values. See the *Oracle Applications Multiple Organizations Implementation Guide* for details on enabling Oracle TeleSales users to access multiple operating units while logged in using a single responsibility.

### Roles

Within sales applications, there are three main roles: Administrator, Manager, and Agent/Representative. Use Resource Manager to assign at least one role to every sales employee.

Although roles and responsibilities can often have the same name, they perform different functions. Responsibilities are a general feature of all Oracle applications and control what features of the application a user can access. By contrast, roles control what customer, lead, and opportunity information users can view and modify.

Here are the available roles as delivered with the application without modification to any profiles:

- **Administrator**: Users assigned the Administrator role can view customers, leads, and opportunities accessible to their group and for all subordinate groups. A user with this role cannot create customers, opportunities, or sales leads. Whether the administrator can modify information accessible to their group depends on the setting of the profile option OS: Sales Admin Update Access discussed later in this section.

- **Manager**: Users assigned the Manager role can view all customer, lead, and opportunity information accessible to their group and all of the groups subordinate to this one in the hierarchy. Whether a manager can update information accessible to subordinates depends on the setting of the system profile option OS: Manager Update Access.

- **Agent or Representative**: Users assigned the Agent or Representative role can view customer, lead, and opportunity information.

The level of access that these roles provide is dependent on the setting of profiles OS: Customer Access Privilege, OS: Sales Lead Access Privilege, and OS: Opportunity Access Privilege. These profiles can override any restrictions based on roles.

### Resource Groups

A group is a set of employees within your organization. Groups can be organized into hierarchies that mirror the reporting structure of your sales organization. The hierarchy that you build determines the following:

- How opportunity information is rolled up

- How customer, lead, and opportunity information that is created by a sales employee is accessed by other members of the sales organization

For example, an employee with the role of Manager that is assigned to a group in the hierarchy has access to customer, lead, and opportunity information created by individuals in that group and in subordinate groups.

Employees with the Sales Administrator role can be given the same access to

information as Managers by setting the system profile option OS: Sales Admin Update Access set to Update data. A setting of Inherit data means the administrator can update the same customers, leads, and opportunities as the manager's subordinates.

## Territory Manager and Sales Team Assignment

Territory Manager assigns customers, leads, and opportunities to sales employees based on configurable business rules. A sales team is a group of sales users who have been assigned manually or automatically using Territory Manager. A Territory Administrator creates territories within the structure of a territory hierarchy. The Territory Administrator then enables the territory definitions. After completing these steps, you run a concurrent program with Territory Manager to assign the group of employees to a particular business object.

## System Profile Options

System Profile Options determine the level of access provided by sales teams, groups, and roles. Some profile options determine whether certain roles have the ability to create new customers, leads, and opportunities. Other profile options determine whether certain roles can update specific lead and opportunity attributes.

There are seven categories of security related system profile options:

**General Access Privilege**: These profile options determine how each of the three roles (Administrator, Manager, and Agent/Representative) can view, create, and update.

- OS: Opportunity Access Privilege

- OS: Customer Access Privilege

- OS: Lead Access Privilege

**Creation**: These profile options determine whether a particular user can create a new organization, person, or contact.

- OS: Create Organization Privilege

- OS: Create Person Privilege

- OS: Create Contact Relationship Privilege

**Creation of Opportunities and Leads**: This profile option determines whether a user can create opportunities and leads for all customers or only for those customers that the user can access.

- OS: Enable Customer LOV Security

**Ownership Change**: These profile options determine whether a user can change the owner of a lead or opportunity.

- OS: Privilege to Change Lead Owner

- OS: Privilege to Change Opportunity Owner

**Internal Partner and Competitor Visibility**: These profile options enable users to view the partners and competitors of their internal organization whether or not they are granted access to the partner or competitor information with other profile options.

- OS: View Partner Party Detail

- OS: View Competitor Party Detail

**Sales Admin Update / Manager Update**: These profile options increase the access of the sales administrator role and manager role. Employees with the sales administrator role can access the same information as employees with the manager role. Alternatively, employees with the sales administrator role can update the same customers, leads, and opportunities as the manager's subordinates.

- OS: Sales Admin Update Access

- OS: Manager Update Access

## Customer Sales Teams

Sales teams can be built for either a consumer (a party of type Person) or an organization. A sales team is a group of sales users who have been assigned manually or automatically to a party using Territory Manager. The ability to access, view, or update a particular customer can be based on sales team membership.

For example, if you set OS: Customer Access Privilege to Full for a user or a group of users, then that user or group has access to all customer information. Those individuals are not added to the customer sales team.

If this system profile is set to Sales Team:

- Users can control who has access to information on a customer sales team by selecting the Keep box next to a sales team member. This ensures that a team member keeps access to the information regardless of the territory assignment.

- A user on a sales team for a customer gains automatic access to all of the records of any contact with a relationship to that organization. Users need not be on the sales teams for both the consumer and the organization. It is sufficient for them to be on the organization sales team to have access to personal information.

- All agents or salespeople on an opportunity sales team have view access, but to enable them to make changes the opportunity creator must select the Full Access box next to their names. Members with a deselected box have read-only access.

> **Note:** The role you assign a customer sales team member is not the
> same role you assign an employee using the Resource Manager.
> The two role types serve different functions.

Setting OS: Customer Access Privilege to Prospecting gives the same update privileges as the Sales Team setting, but enables all users to view customer records even if they are not on the sales team. Customer sales teams permit the customer record creator or sales team member to select a role for each sales team member. Selecting the role of Account Manager gives a sales team member the ability to view all of the opportunities and leads for the customer.

## Lead Sales Team

Sales teams can be built for a lead. A sales team is a group of sales users who have been assigned, manually or automatically, using Territory Manager. The ability to access, view, or update a particular lead can be based on sales team membership.

How a lead sales team controls access to information and the ability to modify it is determined by the setting of the profile option OS: Lead Access Privilege. If the setting of this profile is Full at the site level, then all employees can access and modify the lead.

Membership on the sales team and lead ownership become important when this profile is set to Sales Team:

- Only sales team members and agents or salespeople assigned the role of Account Manager can view the lead. Only those sales team members who have the Full box selected next to their name can update the lead.

- The owner of the lead gains both read and write access automatically. In addition, the lead owner is the only person who can change lead ownership. You can grant other sales team members the ability to reassign ownership by setting the profile option OS: Privilege to Change Lead Owner to Yes. These team members must have write access.

- Leads can be either assigned by the lead creator or current owner manually or automatically using a work flow program.

The automatic lead assignment program uses the same territories as Territory Manager. It assigns the first person in the territory as the lead owner and the remaining people as sales team members.

Members of the lead sales team for a specific customer who are assigned the role of Account Manager can view all leads for that customer regardless who these leads are assigned to.

Setting OS: Lead Access Privilege to Prospecting gives the same update privileges as the Sales Team setting, but enables all users to view leads even if they are not on the sales team.

### Opportunity Sales Team

Sales teams can be built for an opportunity. A sales team is a group of sales users who have been assigned, manually or automatically, using Territory Manager. The ability to access, view, or update a particular opportunity can be based on sales team membership.

How a sales team controls access to information and the ability to modify it is determined by the setting of the profile option *OS: Opportunity Access Privilege*.

For example, if you set this profile to Global Full for a particular user or group of users, then that user or group gains access to opportunities and can modify them. These individuals are not added to the opportunity sales team. If you set this profile to Org Full, users can access to all operating units under their security profile.

Membership on an opportunity sales team becomes important when OS: Opportunity Access Privilege is set to Sales Team. In this case:

- Sales team members are assigned either automatically, by the Territory Manager module, or manually, by the creator of the opportunity. The creator of an opportunity is automatically put on the sales team with full modification privileges.

- All agents or salespeople on an opportunity sales team have view access, but to enable them to make changes the opportunity creator must select the Full Access box next to their names. Members with an unselected box have read-only access.

- Sales team members can control who has access to information on the opportunity sales team by selecting the Keep box next to a sales team member. This ensures that a team member keeps access to the information regardless of the territory assignment.

- The customer record creator or sales team member can select a role for each sales team member. Selecting the role of Account Manager gives a sales team member the ability to view all of the opportunities and leads for the customer. The default setting of the Role field is controlled by the system profile option OS: Opportunity Sales Team Default Role Type. I removed only the sentence about the profile option.

Setting OS: Opportunity Access Privilege to Prospecting gives the same update privileges as the Sales Team setting, but enables all users to view opportunities even if they are not on the sales team.

## Effects of Security Related Profile Options

This section describes the effect of different settings on access to customer (organization and person), opportunity, and lead information.

### Access to Customer Information

The following table describes the effect of different settings on access to customer

information. A customer can be either a consumer (party type of Person) or an organization. This table is organized by the different settings of the profile option OS: Customer Access Privilege.

| OS: Customer Access Privilege | Who Can View | Who Can Create | Who Can Update |
|---|---|---|---|
| Full | Employees with any role can view all customers. | Employees with Manager, Agent, and Representative roles can create customers.<br><br>The Administrator role cannot create customers. | Employees with any role can update all customers. |
| Prospecting | Employees with any role can view all customers. | Employees with Manager, Agent, and Representative roles can create customers.<br><br>The Administrator role cannot create customers. | Employees with any role can update customer information provided they are on the sales team with Full access.)<br><br>Employees with the Manager role can access customer information for their subordinates. If OS: Manager Update Access is set to Update data, then the managers can update any customer information their subordinates can view. If this system profile is set to Inherit data, then the managers can only update information their subordinates can update. |

| OS: Customer Access Privilege | Who Can View | Who Can Create | Who Can Update |
|---|---|---|---|
| Sales Team | Employees with any role can view customer information if they are on the sales team. | Employees with Manager and Agent or Representative roles can create customers.<br><br>The Administrator role cannot create customers. | Employees with all roles can update customer information provided they are on the sales team.<br><br>Employees with the Manager role can access customer information for their subordinates. If OS: Manager Update Access is set to Update data, then the managers can update any customer information their subordinates can view. If this system profile is set to Inherit data, then the managers can only update information their subordinates can update.<br><br>The OS: Enable Customer LOV Security profile option restricts the customers to opportunity creation only when OS: Customer Access Privilege is set to Sales Team. In this case, the user needs at least read-only access to the customer (through the sales team directly, or through the reporting hierarchy). |

The following table describes the effect of different settings for the profile listed.

| OS: Create Organization Privilege | Who Can Create |
| --- | --- |
| Yes (default) | User with Manager or Representative roles can create organizations. Administrator role cannot create. |
| No | User cannot create organizations. |

The following table describes the effect of different settings for the profile listed.

| OS: Create Person Privilege | Who Can Create |
| --- | --- |
| Yes (default) | User with Manager or Representative roles can create people. Administrator role cannot create. |
| No | User cannot create people. |

The following table describes the effect of different settings for the profile listed.

| OS: Create Contact Relationship Privilege | Who Can Create |
| --- | --- |
| Yes (default) | User with Manager or Representative roles can create contact relationships. Administrator role cannot create. |
| No | User cannot create organizations. |

## Access to Opportunity Information

The following table shows the different levels of access to opportunity information depending on a variety of system profile settings and role assignments. This table is organized by the different settings of the profile option OS: Opportunity Access Privilege as this profile option has the most impact on access to opportunity data.

The following table assumes that the profile OS: Enable Customer LOV Security is set to Yes. If this profile is set to No, then all users can create opportunities for any customer and retain the ability to update the opportunities they have created.

| OS: Opportunity Access Privilege | Who Can View | Who Can Create | Who Can Update |
|---|---|---|---|
| Org Full (Full access by security profile setting) | Employees with any role can view opportunities for all operating units to which they have access according to security profile settings.<br><br>All can view any opportunity where they are on the sales team. | Employees with the Manager and Agent or Representative roles can create an opportunity provided they are on the sales team for the opportunity customer.<br><br>Administrator roles cannot create opportunities. | Employees with any of the three Resource Manager roles can update opportunities accessible from their HR organization.<br><br>All can update opportunities when they are on the sales team and have the Full Access box selected. |
| Global Full | All employees with any role. | Employees with the Manager and Agent or Representative roles can create an opportunity provided they are on the sales team for the opportunity customer.<br><br>Administrator roles cannot create opportunities. | All employees with any role. |

| OS: Opportunity Access Privilege | Who Can View | Who Can Create | Who Can Update |
|---|---|---|---|
| Prospecting | All employees with any role. | Employees with the Manager and Agent or Representative roles can create an opportunity provided they are on the sales team for the opportunity customer.<br><br>Administrator roles cannot create opportunities. | Employees with the Agent or Representative role can update the opportunity provided they are on the sales team with the Full Access box selected.<br><br>Employees with the role of Manager and the OS: Manager Update Access set to Update data can update the opportunities accessible to subordinates. A setting of Inherit data means they inherit the view and update privileges of their subordinates. |

| OS: Opportunity Access Privilege | Who Can View | Who Can Create | Who Can Update |
|---|---|---|---|
| Sales Team | Employees with the role of Agent or Representative can view an opportunity only when they are on the sales team.<br><br>Employees with the Manager or Administrator roles can view the opportunity regardless of whether or not they are on the sales team provided a subordinate is on the sales team.<br><br>Employees on the customer's sales team who have been assigned the role of Account Manager can view the opportunity regardless of whether they are on the opportunity sales team or not. | Employees with the role of Agent or Representative can create the opportunity only when they are on the sales team and the Full Access box is selected | Employees with any role can update an opportunity provided they are on the opportunity sales team.<br><br>Employees with the role of Manager and the OS: Manager Update Access set to Update data can update the opportunities accessible to subordinates. A setting of Inherit data means they inherit the view and update privileges of their subordinates.<br><br>The OS: Enable Customer LOV Security profile option restricts the customers to opportunity creation only when OS: Customer Access Privilege is set to Sales Team. In this case, the user needs at least read-only access to the customer (through the sales team directly, or through the reporting hierarchy). |

The following table describes the effect of different settings for the profile listed.

| OS: Privilege to Change Opportunity Owner | Applies to | Description |
|---|---|---|
| Yes | Opportunity | Current owner and person with this profile set to Yes can change opportunity owner. |
| No (default) | Opportunity | Current owner and person with this profile set to No cannot change opportunity owner. |

### Access to Sales Leads

The following table shows the different levels of access to lead information depending on a variety of system profile settings and role assignments. This table is organized by the different settings of the profile option OS: Lead Access Privilege as this profile option has the biggest impact on access to lead data.

This table also assumes that the profile OS: Enable Customer LOV Security is set to Yes. If this profile is set to No, then all users can create leads for any customer and retain the ability to update the leads they have created.

There is a lead sales team in addition to a lead owner. The security for leads is similar to opportunities except that there is no Org Full (Full access by HR organization) setting for OS: Lead Access Privilege.

Lead sales teams are different from opportunity sales teams in that:

- If you are not a sales lead owner or an owner doesn't exist among your subordinates, then you cannot change the owner flag on the sales team.

- If the sales lead access profile is set to Full, then you can update any sales leads.

- You can reassign the ownership of a lead only if you are the lead owner or if one of the people working for you in the sales group hierarchy is the lead owner. You can grant other sales team members the ability to reassign ownership by setting the profile OS: Privilege to Change Lead Owner to Yes. These individuals must have write access.

- The full access flag is always checked for the owner.

The following table describes the effect of different settings for the profile options.

| OS: Lead Access Privilege | Who Can View | Who Can Create | Who Can Update |
|---|---|---|---|
| Full | All employees with any role. | Employees with the Manager, Agent, and Representative roles can create a lead provided they are on the sales team for the customer.<br><br>Administrator roles cannot create leads. | All employees with any role. |
| Prospecting | All employees with any role. | Employees with the Manager, Agent, and Representative roles can create a lead provided they are on the sales team for the customer.<br><br>Administrator roles cannot create leads. | Employees with the Agent or Representative role can update the lead provided they are on the sales team with the Full Access box selected.<br><br>Employees with the role of Manager and the OS: Manager Update Access set to Update data can update the leads accessible to subordinates. A setting of Inherit data means they inherit the view and update privileges of their subordinates. |

| OS: Lead Access Privilege | Who Can View | Who Can Create | Who Can Update |
|---|---|---|---|
| Sales Team | Employees with the Manager, Agent, and Representative roles can view a lead only when they are on the sales team.<br><br>Employees with the Manager or Administrator roles can view the lead regardless of whether or not they are on the sales team provided a subordinate is on the sales team.<br><br>Employees on the customer sales team who have been assigned the role of Account Manager can view the lead regardless of whether they are on the lead sales team or not. | Employees with the role of Agent or Representative can create the lead only when they are on the sales team and the Full Access box is selected. | Employees with any role can update the lead provided they are on the lead sales team.<br><br>Employees with the role of Manager and the OS: Manager Update Access set to Update data can update the leads accessible to their subordinates. A setting of Inherit data means they inherit the view and update privileges of their subordinates. |

The following table describes the effect of different settings for the profile listed.

| OS: Privilege to Change Lead Owner | Applies to | Description |
|---|---|---|
| Yes | Leads | Current owner and person with this profile set to Yes can change lead owner. |
| No (default) | Leads | Current owner and person with this profile set to No cannot change lead owner. |

## Access to Contact Information, Notes, Tasks, and Interactions

Access to contact information is based on a combination of customer and opportunity

access. Access to tasks, notes, interactions, and attachments is based on customer, lead, or opportunity view access. For example, if you have view access to an opportunity, then you have access to the notes for that opportunity.

Similarly, if a user cannot update the organization or person, then they cannot update the addresses of the organization or person.

## Access by Managers and Administrators

These profile options increase the access of the sales administrator role and manager role.

The following table describes the effect of different settings for the profile options.

| OS: Sales Admin Update Access | Who Can Update |
| --- | --- |
| Inherit<br><br>Update<br><br>Read/View (default) | An employee with the Administrator role (as defined in the Resource Manager) can access the same records as the manager of the group they are assigned to. Groups are also set up in Resource Manager.<br><br>There are three types of access:<br><br>**Inherit data**: Administrators inherit the access privileges of the group manager. This means they can update the same customers and opportunities as the manager's subordinates.<br><br>**Update data**: The administrator can update the same data as the manager of the group.<br><br>**View Data**: Administrators can only view the data created by the manager's subordinates. |

The following table describes the effect of different settings for the profile listed.

| OS: Manager Update Access | Who Can Update |
|---|---|
| Inherit<br><br>Update<br><br>Read/View (default) | This profile option sets the level of access for sales team members with the role of Manager to update information for their subordinates in the sales organization. This system profile applies only to individuals granted the Sales Team access privilege in OS: Opportunity Access Privilege.<br><br>This profile has three possible settings:<br><br>Inherit data: Inherit access privilege from subordinate.<br><br>Update data: Update.<br><br>View data: View data only |

Refer to the *Oracle Applications System Administrators Guide* for additional information about the effects of profile option settings.

## Sample Security Setups

Imagine that your sales organization consists of two sales representatives: Sue Pierce and George Ramos. Ms. Pierce is also Mr. Ramos's manager.

As Ms. Pierce is both a manager and a sales representative, you assign her both the TeleSales Manager and TeleSales Agent responsibilities. Mr. Ramos is not a manager so he gets only the TeleSales Agent responsibility.

Using Resource Manager, you assign the TeleSales Manager and TeleSales Agent roles to Ms. Pierce and the TeleSales Agent role to Mr. Ramos. As there is only one level of reporting hierarchy in this sales organization, you create only one group, Global Sales, with both sales representatives.

If you have an employee with the role of TeleSales Manager in a group, then that person automatically becomes the manager of the other employees in the same group. If you have set up a hierarchy of groups, that manager is also the manager of the employees lower in the group hierarchy. You can assign only one individual with the role of TeleSales Manager per group.

The responsibilities, roles, and groups set up the basic framework for your security and reporting implementation. The two following examples illustrate how different system profile option settings affect access of employees to data.

### Case 1: Full Access for Managers; Restricted Access for Sales Representatives

Suppose you want sales managers to be able to access all leads, opportunities, and

customer records, but you want sales agents to be restricted to accessing only information within the sales territories you have set up with the Territory Manager module.

To accomplish this, you can set up the two responsibilities TeleSales Manager and TeleSales Agent with different levels of access.

To do so, you set the profiles options OS: Customer Access Privilege, OS: Lead Access Privilege, and OS: Opportunity Access Privilege at the responsibility level. The TeleSales Manager responsibility is set to Global Full. The TeleSales Agent responsibility is set to Sales Team.

When Sue Pierce logs into the application and selects the TeleSales Manager responsibility, she is granted the rights to view and modify all customer, lead, and opportunity data.

The setting of these three profile options to Full overrides all other settings. It does not matter what group and role Ms. Pierce chooses or what the setting for the system profile option OS: Manager Update Access, Ms. Pierce still retains view and update access to all data.

By contrast Mr. Ramos's access is restricted. Mr. Ramos logs in and must choose the TeleSales Agent responsibility because that is the only one available to him. When he launches the eBusiness Center he must also select a sales group and role that determines how any opportunity he creates is reported to the managers in the sales group hierarchy. If Mr. Ramos is a member of just one sales group that selection is made for him automatically.

In the eBusiness center Mr. Ramos is restricted to viewing only those leads, opportunities, and customers where he is on the sales team. Presence on a customer lead team grants him automatic update privilege. But to be able to update leads he must be the lead owner or have the Full Access box selected next to his name on the list of team members. He can modify only those opportunities where he is on the sales team and has the Full Access box selected next to his name.

### Case 2: Restricted Access for Both Managers and Sales Representatives

Suppose you want to restrict both sales managers and agents to accessing only those leads, opportunities, and customer records within their sales territories.

In this case you set system profile options OS: Customer Access Privilege, OS: Lead Access Privilege, and OS: Opportunity Access Privilege to Sales Team for both the TeleSales Manager and TeleSales Agent responsibilities.

Ms. Pierce logs into the application, selects the TeleSales Manager responsibility, and launches the eBusiness center. If she happens to be a member of multiple sales groups, Ms. Pierce selects the Global Sales group and TeleSales Manager Role. This determines how her opportunities and those of her subordinates are reported to her superiors.

Now Ms. Pierce can view only those customer, opportunity, and lead records where she is on the sales team. If she is on the customer sales team, she can automatically modify the customer record. For opportunities and leads, she can only update those records

where she has the Full Access box selected next to her name. If she is designated as the owner of a lead, she can also reassign the lead to someone else.

But because she is a manager in the sales group, Ms. Pierce can also view all information Mr. Ramos can access. Her level of access can be increased by setting OS: Manager Update Access. A setting of Update data gives her rights to update Mr. Ramos's opportunities and customers even if he has view-only access. A setting of Inherit data gives her the ability to update only those opportunities and customers Mr. Ramos can.

Ms. Pierce or Mr. Ramos can be given special view privileges that override any restrictions for a specific customer. For example, by placing Ms. Pierce on the sales team for General Foods and assigning her the sales force role of Account Manager enables her to view all leads and opportunities for General Foods regardless of membership on sales teams.

# Defining Resource Groups

Use this procedure to set up resource groups. Resource groups:

- Determine how opportunity and forecast information is aggregated in reports.

- Are one of the factors that control the access by managers to customers, leads, and opportunity information maintained by their subordinates.

If you want managers to access customers, leads, and opportunities created by their subordinates, then you must set up a hierarchy of sales groups that mirrors your sales organization.

You can have multiple employees in one group. An employee in a group with the role of manager automatically becomes the manager of the other employees in that group and of the employees in the groups below in the hierarchy.

> **Note:** You must not assign more than one employee with the role of Manager per group. Doing so affects reporting accuracy.

**Responsibility**

Oracle Sales Administrator

**Navigation**

CRM Foundation > Resource Manager > Maintain Resources > Groups

## To search for a resource group:

1. Click **Find** on the application toolbar to open the Find Group window.

2. Select a group name from the list of values in the Group Name field and click **Find** .

**3.** Select a group name in the Results table.

**To create a new group**

**4.** Enter a group name.

**5.** Enter a brief description.

**6.** Enter the effective dates for the group in the Start and End fields.

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

> **Note:** To create a hierarchy of groups, start at the bottom or the top of the hierarchy. This facilitates linking each group to the parent group or to its child groups.

**To add each group to the group hierarchy**

**8.** On the Parent Groups tab, enter the group, if any, that is above the current group in the group hierarchy.

> **Note:** You do not need to enter both parent and child groups. If you build your hierarchy by entering parent groups, then you need not enter child groups and vice versa. The missing groups are supplied by the application automatically.

**9.** On the Child Groups tab, enter the groups that are below the current group in the group hierarchy.

**10.** On the Usages tab, use the LOV to enter Sales and TeleSales. You must make this entry for the group to be recognized by the application.

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

**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. Have the previous manager save his forecast worksheet and resubmit the forecast for his group.

3. Have the sales representative and the new manager save their forecast worksheets and resubmit their forecasts.

### All Members of a Sales Group Move to Another Sales Group

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

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.

## Related Topics

For more information on using Resource Manager see the *Oracle Trading Community*

*Architecture User Guide* .

# Defining Responsibilities

All Oracle applications products are installed with predefined responsibilities. These responsibilities are specific to the application that you are implementing.

Follow the instructions in the *Managing Oracle Applications Security* chapter of the *Oracle Applications System Administrator's Guide*.

**Responsibility**

Oracle Sales Administrator

**Navigation**

CRM Foundation > Resource Manager

If you are creating a responsibility you must:

### Steps:

1. Create a region similar to the application function security region, ASF_FUNC_SEC_REG, by copying it.

2. Set up the value of FUNCTION_SECURITY_REGION profile to the region that you created for your application.

# Setting Up Employees as Users

Use this procedure to set up individual employees as users for your sales application.

**Responsibility**

System Administrator

**Navigation**

Security > User > Define

### Steps:

1. Enter a user name and password, and then reenter the password.

2. Use the Person LOV to select the employee that will use the user name and password.

3. Assign one or more responsibilities to the user. The available responsibilities are:

   • TeleSales Agent

- TeleSales Marketing Agent

- TeleSales Manager

- TeleSales Administrator

4. Click **Save** in the toolbar.

# Importing Employees and Assigning Roles and Resource Groups

Use this procedure to import employees from Oracle HRMS. You must set up the employees in HRMS first.

**Responsibility**

Oracle Sales Administrator

**Navigation**

CRM Foundation > Resource Manager > Maintain Resources > Import Resources

## Steps:

1. Select Employee from the **Resource Category** menu.

2. If you are importing a single employee, then use the Name LOV. For groups of employees, search by job title, competency, or other search criteria.

3. Click **Search**.

4. Select the boxes for the employees you want to import as resources into your sales application. The next step assigns a single role to each of the selected resources.

5. Click **Create Resource**.

6. Use the Role LOV to select one of the available roles to assign to the resources.

   For Oracle TeleSales the available roles are:

   - TeleSales Administrator

   - TeleSales Manager

   - TeleSales Agent

7. Click **OK**.

8. If there are any employees on the list you do not want to receive this role, deselect their Select box.

9. Click **Save Resource**. The Save Resource button grays out indicating that you have successfully imported the resources.

10. To add additional roles to any of the employees perform the following steps. A TeleSales user must also have a Sales role type.

    1. Navigate to CRM Foundation > Resource Manager > Maintain Resources > Resources

    2. In the Find Resources window, click **Find**.

    3. Select the employee.

    4. Click **Resource Details**.

    5. Click **New** on the toolbar.

    6. On the Role tab, use the Role Type LOV to select Sales.

    7. Use the Role LOV to select the role.

    8. Add any additional role for this employee by repeating the above two steps.

    9. Click **Save** on the toolbar and close the Resource window.

11. Assign sales groups to each employee and select the roles they are going to have in each. For each employee:

    1. Navigate to CRM Foundation > Resource Manager > Maintain Resources > Resources.

    2. In the Find Resources window, click **Find**.

    3. Select the employee.

    4. Click **ResourceDetails**.

    5. In the Groups region of the Groups tab, use the Name LOV to assign a group to the employee.

    6. In the Group Member Roles region, use the Name LOV to select one or more roles for this employee in the group.

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

    8. Repeat the above three steps for each group to which you want to assign the employee.

## Restrictions

While you can create custom roles, Oracle recommends that you use the seeded roles because they are tied to specific functionality in your sales application.

You can assign a resource to multiple groups, but a group can have only one manager. Having multiple managers in a group affects forecast rollups.

If managers create and manage their own opportunities, then you must assign them both as managers and members of the group. You can do this by giving the manager both manager and representative roles. For Oracle TeleSales, assign the TeleSales Manager and the TeleSales Agent roles.

# Setting Up System Profile Options to Give Users Access

Use this procedure to give employees access to information by setting system profile options. These system profile options, in combination with the role and group each employee is assigned to, determine what information a user can view and modify.

> **Note:** Security profile options give you a flexible way to set up data access privileges for your sales organization. However, it is possible to set profile options that create invalid data access rules in the application. For example, users with access to a customer's leads and opportunities must also have access to the customer information. You should not restrict customer access by setting OS: Customer Access Privilege to Sales Team while providing complete access to all opportunities by setting OS: Opportunity Access Privilege to Global Full. The application does not automatically check for this type of setting to make sure that it is valid. Then, run the concurrent program *Setup Checking for Oracle Sales Application* and view the error log to find these types of errors.

**Responsibility**

Oracle Sales Administrator

**Navigation**

Profiles > System

**Steps:**

1. Set the following profile options. For detailed information of available settings, see the table of system profile options listed in Appendix A and the explanation of lead security in Setting Up Users, Security, and Reporting Hierarchy, page 4-9.

   • OS: Customer Access Privilege

- OS: Opportunity Access Privilege

- OS: Lead Access Privilege

- OS: Privilege to Change Lead Owner

- OS: Manager Update Access

- OS: Sales Admin Update Access

- OS: Always Add Creator to Customer Sales Team

- OS: Create Organization Privilege

- OS: Create Person Privilege

- OS: Create Contact Relationship Privilege

2. To restrict sales application users to creating opportunities only for customers they can view set the profile option OS: Enable Customer LOV Security set to Yes.

   Setting this profile to No enables all users to create opportunities and sales leads for any customers. The users can update the opportunities and sales leads they have created.

3. Under the Oracle Sales Administrator responsibility, navigate to Concurrent Requests > Run.

4. Run the concurrent program Setup Checking for Oracle Sales Application. Enter `No` when the Parameters window prompts you with the question: "Only for 11*i* upgrade?".

   This concurrent program checks for any inconsistencies in the setting of access privilege system profiles. The program generates a log file with any errors, such as missing or invalid profile settings.

# Setting Up Default User Role and Sales Group

You can set up a default user role and sales group for employees with multiple roles and sales groups. This makes it possible for users to use the application without having to select a role and group first. You can set up a default user role and sales group for each user with multiple groups and roles by setting the system profile options:

- OTS: Default User Role

  Set the default, save it, and exit the System Profile Values window. Then re-enter the Profile Values window to set the next profile option.

- OTS: Default User Sales Group

  By setting a default, users no longer have to choose a role and group each time they launch the eBusiness Center. Users can also set this default up themselves.

## Setting Up Lead Management

Leads management is a Marketing module that enables users to capture, evaluate, and distribute leads for follow up. A lead is an expressed customer interest that a sales representative uses to determine whether there is potential for a sales opportunity. Leads track information such as the customer and contact, their budget and purchase time frame, and the products and services in which they are interested. The lead is ranked and given a status to assist the sales representative in determining the level of interest of the customer.

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

## Importing Leads

Importing leads is optional. Use this functionality if you have leads to be imported from an external source or from Oracle Marketing Online.

Required fields to import successfully for Oracle TeleSales are:

- Party Type

- Customer Name or First Name / Last Name

While importing leads, data on customers, addresses, and contacts are also imported into the customer model (TCA) tables.

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

## Setting Up Opportunities and Forecasting

Opportunities are created after leads are qualified and the sales representative has determined that there is sufficient potential for a sale to this customer. Opportunities track information such as customer product interest, competitors for the opportunity, potential close date, sales stage, and status. Opportunities can also have sales methodologies. The sales methodology has a predefined set of sales stages with an associated set of tasks for each stage. Sales methodologies are used to maintain a consistent processes and best practices during the sales cycle.

Forecasting is a quantitative tool used by sales organizations to estimate the amount of sales that the company can make in a specific time period, based on the opportunity pipeline. Forecasting is used by a sales representative within the sales hierarchy.

Setting up opportunities and forecasting consists of the following.

1. Setting Up Opportunity Profiles, page 4-37

2. Creating Win Probabilities, page 4-39

3. Defining or Modifying Sales Stages, page 4-39

4. Setting Up Sales Methodology, page 4-39

5. Setting Up Opportunity Status, page 4-40

6. Setting Up the Product Catalog, page 4-40

7. Setting Up Plan Element Mapping, page 4-41

8. Setting Up Forecast Categories, page 4-42

9. Setting Up Forecast Defaults, page 4-43

## Setting Up Opportunity Profiles

Opportunity classifications are governed by the following profiles.

**Navigation**

Profiles > System

**Responsibility**

Oracle Sales Administrator

The following listed opportunity profile options determine how Oracle TeleSales functions for opportunities. See System Profile Options , page A-1 for details.

- OS: Address Required for Opportunity

- OS: Address Required for Organization

- OS: Address Required for Person

- OS: Address Required for Sales Lead

- OS: Allow Updating Frozen Opportunities

- OS: Daily Conversion Type

- OS: Default Close Date Days

- OS: Default Opportunity Sales Stage

- OS: Default Opportunity Status

- OS: Default Opportunity Win Probability

- OS: Default Period Type for Currency Conversion

- OS: Default Value for Sales Team Keep Flag

- OS: Defaulting Primary Customer Address to Opportunity

- OS: Enable Tracking Opportunity History Data

- OS: Enable Tracking Purchase Line History Data

- OS: Enable Tracking Sales Credits History Data

- OS: Forecast Sales Credit Type

- OS: Generate Opportunity System Notes

- OS: Linking Opportunity to Lead

- OS: Maximum Number of Days Allowed to Close an Opportunity

- OS: Maximum Roll Days for Converting Amount

- OS: Opportunity Probability Link

- OS: Opportunity Sales Credit Enforced Sales Team Definition

- OS: Privilege to Change Opportunity Owner

- OS: Sales Methodology

- OS: Time Frame for Opportunity Logs

### Setting Up Data for Opportunity Aging By Status Report:

1. Set the profile option OS: Enable Tracking Opportunity History Data to Yes. This enables the opportunity history data to be captured and stored in the table AS_LEADS_LOG when an opportunity is created or updated. The default values is No.

2. Set the profile option OS: Time Frame for Opportunity Logs to one of the following values: None or Day. The default value is None.

3. Run the concurrent program Initial Load of Opportunity Log Tables. This program populates the existing opportunity data in the opportunity history table.

4. Run the concurrent program Refresh of Opportunity Status Aging Summary Table. The data for "days in status" in the Opportunity Aging by Status report is based on the last time this concurrent program was run. Running this concurrent program enables users to collect the status history data for the report.

# 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 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 the Product Catalog

All Sales products use the common product catalog in Oracle Product Lifecycle Management to keep track of the product hierarchy. Set up your product catalog in Oracle Product Lifecycle Management.

**Steps:**

1. A hierarchical catalog called Product is seeded for use by Sales and Marketing. You can either use this seeded catalog or create a new product hierarchical catalog with flex structure Product Categories. See the instructions in the *Oracle Product Lifecycle Management User's Guide* for details.

2. Create new product categories with the flex structure Product Categories.

3. Add your created product categories to the product catalog, preserving the parent-child relationships.

4. Set the following Sales and Marketing related attributes for each product category:

   • **Include in Forecast:** All product categories that can be forecasted against should have this flag set.

   • **Expected Purchase:** All product categories that sales reps can log opportunity or lead lines against should have this flag set.

   • **Exclude From User View:** Some product categories might be in the catalog for purely reporting and collection purposes. Such product categories should have this flag set. The product hierarchy presented to sales representatives will not include these categories. These categories can however be used by reporting tools such as DBI.

5. Attach the product catalog you created to the Product Reporting functional area.

6. Using the Catalog Manager responsibility, run the concurrent request Load Catalog Hierarchy to make your categories visible to sales applications.

7. If you are implementing Oracle Territory Manager, then set the system profile option Product Category Enabled to Yes.

# Setting Up Plan Element Mapping

You must map interest types and codes to Plan Elements in Oracle Incentive Compensation so that sales users can estimate their commissions based on their submitted product category worksheet forecasts.

One Plan Element can be mapped to one or more interest type/primary interest code/secondary interest code.

> **Note:** Plan element mapping is required for using Income Planner.

**Login**

Self Service

**Responsibility**

TeleSales Administrator

**Navigation**

TeleSales Administration > Sales > Sales Category > Plan Element Mapping

**Steps:**

1. To search for a plan element mapping:

    1. Enter the plan element.

    2. Select the mapping type from the drop down list.

    3. Click **Search.**

2. To create a new plan element mapping:

    1. Select the first blank Plan Element field and select the plan element you want to map from the drop down list. This is a required field.

    2. From the second column, select the Mapping Type from the drop down list. This is a required field.

       • Map quota to primary interest code - if you want to map the plan element to a primary code.

       • Map quota to secondary interest code - if you want to map the plan element to a secondary code.

       • Map quota to interests type - if you want to map the plan element to an interest type.

    3. Depending on the value you have chosen in step 3 above, continue by choosing an interest type. This is a required field.

    4. Optionally, search for a Primary or Secondary Interest Code by entering the full or partial name, using % as a wildcard, and click **Go**.

3. Click **Update** to save your work.


# 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 4-43 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 Up Forecast Defaults

When a salesperson enters an opportunity amount the forecast fields Best, Forecast, and Worst are calculated based upon the setting for the profile option *ASN: Forecast Defaulting Type.* The salesperson can enter values in these fields to overwrite the calculated amounts. However, the manually entered amounts are overwritten with newly calculated values if the salesperson enters a new value in the Amount field or changes the win probability. If the opportunity status is changed to a non-forecastable status, then the three fields are grayed out. When the status is changed back to a forecastable status, then the fields are calculated.

The following table shows the calculations used if the profile ASN: Forecast Defaulting Type is set to *pipeline*. The calculations are based on the opportunity status.

*Forecast Amounts Based on Pipeline*

| Status | Best | Forecast | Worst |
|--------|------|----------|-------|
| Forecastable Status, Not Won | Pipeline Amount | Pipeline Amount mutliplied by Win Probability | 0 |
| Forecastable Status, Won | Pipeline Amount | Pipeline Amount | Pipeline Amount |

| | | | |
|---|---|---|---|
| Not Forecastable Status | Blank and not editable | Blank and not editable | Blank and not editable |

The following table shows the calculations used if the profile ASN: Forecast Defaulting Type is set to *win probability*. The Win Probability field and the status for the opportunity line is used to determine the calculation for the Forecast fields default values.

***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 |

Amounts for non-revenue sales credits are calculated in the same way as revenue sales credits. 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.

### Non-Revenue Credit Type

Set the system profile option ASN: Default Non-Revenue Credit Type. This profile determines the default credit type used in the non-revenue table for non-revenue forecasting. The default values for this profile can be set by the user through the Sales Default Preferences. The values are based on sales credit types defined in Oracle Order Management.

## Setting Up Multiple Currencies

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

Your sales application calculates currency conversion for individual opportunity purchases based upon an estimate of the actual conversion rate for the date a sales person predicts that an opportunity will close.

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

If a pseudo-period conversion rate is missing, then the program looks back in time to find a conversion rate. How far back is determined by setting the value of the profile OS: Maximum Roll Days for Converting Amount. If no rate is found within this period, then your application displays asterisks and a message that no rates were found. For example, if the profile is set to 365, then the concurrent program (Refresh Multi-Currency) looks for a conversion rate within the last 365 days. If you set the profile to zero, the conversion rates will synchronize.

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

If you are a manager or administrator, then on the forecast main page the currency is converted all the time. But, on the opportunity worksheet and the product category worksheet, currency amounts are not displayed as converted when you view a subordinate's forecast.

Setting up multiple currencies requires the following.

1. Setting Up Currency Codes, page 4-46

2. Setting Up Calendar Types, page 4-46

3. Setting Up the Accounting Calendar, page 4-47

4. Setting Up Type Mapping, page 4-47

5. Setting Up Reporting Currency, page 4-47

6. Entering GL Daily Conversion Rates, page 4-48

7. Run Concurrent Programs, page 4-48

# Setting Up Currency Codes

**Forms Navigation**

Application > Currency

**Forms Responsibility**

System Administrator

## Steps:

1. Enter a code.

2. Enter a name.

3. Enter a description.

4. Enter the issuing territory.

5. Enter a symbol.

6. Enter Precision.

7. Enter Extended Precision.

8. Enter the minimum accountable unit.

9. Enter the currency derivation.

10. Enter the effective dates.

11. Select the Enabled box.

# 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 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 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 Up Reporting Currency

All opportunity and forecast currency conversions are based upon the reporting currency setups. All possible reporting currencies are listed in the Profiles > Preferences > User Currency.

**Forms Navigation**

Oracle Sales Setup > Lookup Codes > Sales

This path takes you to the Oracle Sales Lookup form.

**Forms Responsibility**

Oracle Sales Administrator

**Steps:**

1. Press the F11 key to enter query mode.

2. Enter `REPORTING_CURRENCY` in the type field.

3. Press Control and F11 at the same time.

   Currency codes display in the bottom region of the Form.

4. Enter additional currency codes that you want available when an opportunity is created.

5. Enter the effective dates.

6. Make sure **Enabled** is selected.

7. Save your work.

# 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*.

# Run Concurrent Programs for Multiple Currency

**Forms Navigation**

Concurrent Requests > Run

**Forms Responsibility**

Oracle Sales Administrator

Run the following concurrent programs.

- Refresh AS_PERIOD_DAYS table

- Refresh Multi-Currency Conversion Rates (AS_PERIOD_RATES)

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

If you are using opportunity bins and forecast materialized views, run the following

concurrent programs to refresh materialized views:

- Refresh of as_sales_credits_denorm

- Refresh of Forecast Summary Tables

## Setting Up Quoting

Sales applications rely on Oracle Quoting to manage orders and quotes. Oracle TeleSales uses the Forms-based interface. For details, see the *Oracle Quoting Implementation Guide*.

## Setting Up Flexfields

The following table lists the flexfields used by TeleSales and the details about each flexfield. You must freeze and compile the flexfields using the Forms application after installation is complete. The procedures for freezing and compiling flexfields is located in the *Oracle Applications Flexfield Guide*.

| Flexfield Name | Title | User Interface Location | Context Sensitive |
|---|---|---|---|
| ASF_USER_PREFERENCE | ASF User Preference | Organization/Person, Create/Detail | Yes |
| Remit Address HZ | Address | Address Create/Detail (location information such as country, address1, state, or city) Used for Global Address Formatting. | Yes |
| HZ_PARTIES | Party Information | Organization/Person, Create/Detail | Yes |
| HZ_RELATIONSHIPS | Party Relationship Information | Relationship Create/Detail | Yes |
| HZ_ORG_CONTACTS | Organization Contact Information | Relationship Create/Detail | Yes |

| Flexfield Name | Title | User Interface Location | Context Sensitive |
|---|---|---|---|
| HZ_PARTY_SITES | Party Site Information | Address Create/Detail (Attributes section) | Yes |
| AS_INTERESTS | Interests | Opportunity, Classifications | No |
| AS_ACCESSES | Accesses | Opportunity/Organization/Person Sales Team | No |
| AS_LEADS | Opportunities | Opportunity Create/Detail | Yes |
| AS_SALES_LEADS | Sales Leads | | |
| AS_SALES_CREDITS | Sales Credits | Opportunity Sales Credits | No |
| AS_LEAD_COMPETITORS | Opportunity Competitors | Opportunity Competitors | No |
| AS_LEAD_CONTACTS | Opportunity Contacts | Opportunity Contacts | No |
| AS_LEAD_LINES | Opportunity Lines | Opportunity Purchase Items | No |
| AS_SALES_LEAD_LINES | Sales Leads Lines | Leads | No |
| AS_SALES_LEAD_CONTACTS | Sales Leads Contacts | Leads | No |
| AS_SALES_LEADS | Sales Leads | Leads | Yes |

# Setting Up Notes

**Responsibility**

CRM Administrator

**Navigation**

Notes Setup

**Steps:**

Users can create notes about the different objects in sales applications. You can to use the predefined note types or create your own.

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

# Setting Up Interaction Tracking

**Responsibility**

CRM Administrator

**Navigation**

Interaction History Administration

The Interaction History module provides the CRM suite with a common framework for capturing and accessing all interaction data associated with customer contacts. It acts as a central repository and provides a consistent API for tracking all customer interactions, whether or not automatic or involving an agent. It is crucial in providing the 360 degree view.

Refer to the *Oracle Customer Interaction History Implementation Guide*.

# Setting Up Tasks

**Responsibility**

CRM Administrator

**Navigation**

Task and Escalation Manager

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

# Setting Up Calendar

Responsibility

CRM Administrator

Navigation

Calendar Setup

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

# Setting Up Fulfillment

You must implement fulfillment if you plan to deliver collateral using e-mail to customers and prospects.

Refer the *Oracle One- to One Fulfillment Implementation Guide* for information about setting up e-mail servers as well as the electronic collateral itself.

# Setting Up Territories

Oracle Territory Manager consists of a repository of rules and an engine that automatically assigns sales, service, trade management, services contracts, and collection teams based on their availability and expertise. It can also be used to make sales, service, and collections more secure by restricting access to customer data.

To implement territories for sales you must set up territories per the *Oracle Territory Manager Implementation Guide* and then set up the Territory Assignment Program used by sales that works with the Oracle Territory Manager (see Setting Up and Using Territory Assignment Program (TAP) , page 4-53). Then you can optionally implement self-service territories using Oracle Territory Manager.

Oracle Territory Manager provides user interfaces and functionality that organizations can use to manage sales territories.

If you choose not to set up Oracle Territory Manager, then users must manually assign leads, customers, and opportunities.

Use Territory Manager to automatically assign sales teams based on their availability and expertise. Also use it to make sales information more secure by restricting personnel access to customer data.

Most sales territories are one-dimensional. They can assign tasks to employees based on geography or company size. Territory Manager makes it possible for you to create multidimensional territories using any number of such criteria. These criteria include:

- Postal code

- Area code

- Country

- Company size

For example, you can assign all large customers within a specific geographical area only to those sales representatives who have an expert knowledge of a product and have

been with the company for more than one year.

## Guidelines for Sales Applications

- The only category of resources that the Territory Assignment Program supports is Employees.

- You must create your territories with the Usage as Sales.

- You must choose one or more of the three available transaction types on the Overview tab:

  - Account

  - Lead

  - Opportunity

**Available Transaction Matching Attributes**

Oracle sales applications support the transaction matching attributes for creating territories listed in Transaction Matching Attributes, page 4-75

# Setting Up and Using Territory Assignment Program (TAP)

This section includes:

- TAP Definition, page 4-54

- TAP Guidelines, page 4-54

- Prerequisites for Online (Real Time) TAP, page 4-55

- Prerequisites for Batch Mode TAP, page 4-56

- Setting Up Resource Teams and Groups for TAP, page 4-56

- Deleting Records, page 4-58

- Setting Up Parallel Workers, page 4-59

- Running Concurrent Programs, page 4-61

- Setting Profile Options, page 4-71

- Tables Used, page 4-72

- Transaction Matching Attributes, page 4-75

- About Matching Attributes, page 4-77

- Troubleshooting, page 4-82

## TAP Definition

The Territory Assignment Program is used to assign opportunities, leads, customers, quotes, or proposals to a sales resource automatically (by running a concurrent program) by territory. Territories are defined by selecting matching attributes (parameters) during the implementation process. This is a mandatory step. TAP can be run though a batch program or online.

Assign Territory Access Total Mode and Assign Territory Access New Mode are available from the batch program:

- **Assign Territory Accesses for Total Mode request set:** Total Mode processes all records and all territories, and contains individual requests for these business entities:

  - Accounts

  - Leads

  - Opportunities

  - Quotes

  - Proposals

  You can choose to run any or all of these requests. You run the Assign Territory Accesses for Total Mode request set for a new implementation or after major changes to territory definitions.

- **Assign Territory Accesses for New Mode:** Processes changes made since the last time you ran the concurrent program request set Assign Territory Accesses for Total Mode. Run frequency is based on your business needs.

The following mode is not available from the batch program:

- Online (Real Time) Mode: Process automatically assigns resources to transactions as they are created if one of the associated profiles *OS: Enable Real Time Customer Assignment, OS: Enable Real Time Opportunity Assignment,* or *OS: Enable Real Time Lead Assignment* is set to Yes.

## TAP Guidelines

The following are guidelines for using and implementing TAP.

**Territory Name**

Territories consist of a user defined name. For example, "Southwest" or "Northwest".

**Start and End Dates**

Territories are active between the start and end dates. The assignment of opportunities, leads, customers, proposals, and quotes to that territory can only occur when the territory is active.

**Transaction Matching Attributes**

Territories have matching attributes. These matching attributes are parameters which the program uses to assign opportunities, leads, customers, proposals and quotes to a sales resource. For example, "State = California" or "Opportunity Amount > 50,000". You can use multiple matching attributes to define a territory.

**Assigned Resources**

Territories have resources assigned to them. This means that if a matching attribute is met, then the program assigns the resource to the opportunity, lead, customer, proposal, or quote.

> **Note:** The only category of resources that the TAP program supports is Employees.

**Transaction Type**

Territories have transaction types. The transaction types are Account (Customer), Opportunity, Lead, Proposal, and Quote. Sales team resources are assigned to one or more of these transaction types. Transaction types control which matching attributes you can use.

**Access Type**

Sales resources have access types. The access types are Account, Opportunity, Lead, Proposal, and Quote. Access types are not related to matching attributes. You can use one or more access types.

> **Note:** TAP should be run by a resource who is a valid sales force resource.

## Prerequisites for Online (Real Time) TAP

The Territory Assignment Program is based on the implementation of Oracle Territory Manager. After implementing Oracle Territory Manager, you can proceed with setting up TAP. The JTF: Synchronize Territory Assignment Rules (STAR) concurrent program activates territory changes. Run it as often as you need to in order to change your territory information. The program JTF: Synchronize Territory Assignment Rules (STAR) builds the API that returns the winning territories and resources, and creates a search index for faster performance.

**Additional Prerequisites for Online TAP**

To make Real Time Customer Assignment work you must have these settings:

- HZ: Raise API Events must be set to 'Only Granular (V2) Events Enabled'.

- OS: Enable Real Time Customer Assignment must be set to Yes

Navigate to System Administrator > Workflow: Administrator Workflow > Administration > Business Events to update the status of an event to Enabled.

| Event | Function |
|-------|----------|
| oracle.apps.ar.hz.ContactPoint.create | as_rttap_account.create_contact_point_post |
| oracle.apps.ar.hz.ContactPoint.update | as_rttap_account.update_contact_point_post |
| oracle.apps.ar.hz.Location.update | as_rttap_account.update_location_post |
| oracle.apps.ar.hz.Organization.create | as_rttap_account.create_organization_post |
| oracle.apps.ar.hz.Organization.update | as_rttap_account.update_organization_post |
| oracle.apps.ar.hz.Person.create | as_rttap_account.create_person_post |
| oracle.apps.ar.hz.Person.update | as_rttap_account.update_person_post |
| oracle.apps.ar.hz.PartySite.create | as_rttap_account.create_party_site_post |
| oracle.apps.ar.hz.PartySite.update | as_rttap_account.update_party_site_post |

## Prerequisites for Batch Mode TAP

The Territory Assignment Program is based on the implementation of Oracle Territory Manager, which also requires Oracle Resource Manager. After implementing Oracle Territory Manager, you can proceed with setting up TAP.

## Setting Up Resource Teams and Groups for TAP

Resource Groups and Sales Groups must be set up in CRM Foundation in order to use this feature with TAP.

### Sales Group Support in TAP

When a sales group is assigned to a territory, members of the group are added to the sales team if:

- Usage of the group is Sales

- Member is an Employee and has a Sales role

The following members of a group are not added to the sales team:

- Members who belong to a parent or child of the group

- Inactive members

- Members who are not employees

- Member having inactive Sales roles

- If member already exists on the sales team for the same group (in case of customer sales team, same group having default role)

The following changes take effect only when TAP is run in Total mode. New mode TAP is not able to handle these changes unless JTF Resources writes the changes in jtf_terr_rsc_all.

- If a member is removed or added in the sales group

- If the group is disabled

- If the group usage is changed

When a group is removed or added to a territory, the changes take effect after TAP is run in Total or New mode.

Online TAP uptakes this functionality as well.

The sales team tab doesn't support this functionality.

**Resource Group Support in TAP**

A resource group consists of one or more individual resources as well as sales groups.

When a resource team is assigned to a territory, members of the sales team are added to the sales team if the Usage of the resource team is Sales and:

- Member is an Individual and is an Employee and has a Sales role or

- Member is a group and:
    - Usage of the group is Sales and

    - Member of the group is an Employee and has a Sales role

The following members of the resource team are not added to the sales team:

- Inactive members

- Members who are not employees

- Members not having Sales roles

- Member having inactive Sales roles

- Members already exist on the sales team for the same group (in the case of a customer sales team, the same group having a default role)

- Groups not having sales usage members who belong to a parent or child of the group (if member is a group).

The following changes take effect only when TAP is run in Total mode. New mode TAP is not able to handle these changes unless JTF Resources write the changes in jtf_terr_rsc_all:

- If resource team is disabled

- If resource team usage is changed

- If a member is removed or added in the resource team or the sales group which is member of the resource team

- If the group is disabled

- If the group usage is changed

When the resource team is removed or added to a territory, the changes take effect after TAP is run in Total or New mode.

Online TAP uses this functionality as well.

The Sales Team tab supports this functionality with the following differences:

- The Sales Team tab supports partners within a resource team, but TAP does not process partners.

- The Sales Team tab does not support groups within a resource team. TAP supports groups within a resource team.

## Deleting Records

If you run the TAP program and do not use the delete function, the result is a high volume of data in the access tables which can adversely affect application performance.

There are two parts to deleting records in TAP. The first part marks the records for deletion, and the second part purges the records. The more records marked for deletion, the longer the program takes to purge the records.

**Mark Records for Deletion (Soft Delete)**

TAP automatically marks records for deletion based on the changing territory parameters.

**Deletion of Records (Purge Program)**

Deletion of records marked for deletion from the tables AS_ACCESSES_ALL_ALL and AS_TERRITORY_ACCESSES.

The following table includes the parameters for the Purge TAP Access table:

| Parameter | In/Out | Possible Values |
|---|---|---|
| Debug | IN | Y or N |
| SQL Trace | IN | Y or N |

The profile option OS: Number of Child Workers for TAP Purge Program is used in the record deletion. In the Online mode, TAP starts as many parallel concurrent programs as specified in the value set for this profile option. Set this value based upon your hardware and database configuration. The default value is 2.

**Guidelines**

When implementing the soft delete function, the table AS_ACCESSES_ALL is renamed to AS_ACCESSES_ALL_ALL. For backward compatibility a view AS_ACCESSES_ALL is provided. This view returns only valid (not deleted) records. Similarly, view AS_ACCESSES is modified to return only valid (not deleted) records.

If you have custom code for the AS_ACCESSES_ALL table:

- All DML statements should make reference to AS_ACCESSES_ALL view

- Any DDL code (new indexes) should make reference to AS_ACCESSES_ALL_ALL table

- If you have defined any triggers on AS_ACCESSES_ALL, then make the necessary changes.

## Setting Up Parallel Workers

In order to improve performance, the TAP program starts multiple processes of the Generate Access Records program to process Account, Opportunity, Lead, Quote, and Proposal transactions. Based on your data load and system resources you can configure how many processes (parallel workers) you want to launch for each transaction type. Parallel workers are launched in Total and New modes.

**Steps:**

1. Consult with your System Administrator to set the appropriate values based on

your database size, data volume, and system configuration.

Set these profile options:

- *OS: Territory Minimum Number of Records for Parallel Processing*: This profile value determines the minimum number of records required to launch multiple parallel workers for each transaction type. The default value is 100.

- *OS: Number of Child Account Workers for TAP*: This profile value determines the maximum number of parallel workers (of Generate Access Records) launched to process Account records. The default value is 2. Maximum number of account parallel workers allowed is 10.

- *OS: Number of Child Opportunity Workers for TAP*: This profile value determines the maximum number of parallel workers (of Generate Access Records) launched to process Opportunity records. The default value is 2. Maximum number of opportunity parallel workers allowed is 10.

- *OS: Number of Child Lead Workers for TAP*: This profile value determines the maximum number of parallel workers (of Generate Access Records) launched to process Lead records. The default value is 2. Maximum number of lead parallel workers allowed is 10.

- *OS: Number of Child Quote Workers for TAP*: This profile value determines the maximum number of parallel workers (of Generate Access Records) launched to process Quote records. The default value is 2. Maximum number of lead parallel workers allowed is 10.

- *OS: Number of Child Proposal Workers for TAP*: This profile value determines the maximum number of parallel workers (of Generate Access Records) launched to process Proposal records. The default value is 2. Maximum number of lead parallel workers allowed is 10.

2. Optional - Changes for Lead and Opportunity Owner Assignment User Hooks

If you have implemented user hooks for Opportunity or Lead owner assignment in the TAP program, you must change the user hook's body. If you have not implemented these user hooks then you can skip this step.

If you have implemented user hooks to change the default behavior of owner assignment for Leads and Opportunities, then read this section carefully and make the appropriate changes.

An additional parameter, p_worker_id, has been added to Leads and Opportunity assignment user hook API specifications:

- Leads AS_CUSTOM_HOOKS_UHK.Lead_TOTTAP_Owner_Assignment(asxcuhks.pl s)

- Opportunity
  AS_CUSTOM_HOOKS_UHK.Oppty_TOTTAP_Owner_Assignment(asxcuhks.
  pls)

As a part of this performance improvement the records to process are distributed between multiple processes for each transaction type. Therefore it is important to use the appropriate worker_id passed to the API to access the records from JTF_TAE_1001_OPPOR_WINNERS and JTF_TAE_1001_LEAD_WINNERS tables while doing the owner assignment (column worker_id has been added to these tables).

## Running the Assign Territory Access Program Concurrent Program

You can assign territories in batch mode by running the Assign Territory Access concurrent program in Total Mode or New Mode.

### Total Mode Request Set

**Responsibility**

Oracle Sales Administrator

**Navigation**

Functions > Current Request > Run > Select Assign Territory Accesses for Total Mode. Click the Parameter field and select Yes to run the various programs when you submit the request. The default for each program is No.

The Assign Territory Access Total Mode request set contains individual programs for each of the following business entities:

- Accounts

- Leads

- Opportunities

- Quotes

- Proposals

You can choose to run any or all of these programs, depending on your user's business needs. There are usually a large number of accounts, many leads and opportunities, and fewer proposals and quotes. For best performance, you can choose to run some of the programs and not others, or run any of them at off-peak times.

There are parameters for each of the Assign Territory Access programs. These are listed in the following tables.

**Parameters for Accounts**

These are the parameters for the Accounts program in the Assign Territory Access Total Mode request set:

| Parameter Name | Parameter Description | Prompt | Default Value | Required |
|---|---|---|---|---|
| Submit Account TAP | Determines if Accounts need to be processed as part of the TAP process or not. | Submit Account TAP | No | Yes |
| Account Type | Determines if customers of type Persons (only) need to be processed or if customers of type Organization (only) need to be processed or both types of customers need to be processed. | Account Type | All | Yes |
| Account Additional where clause | Set to further filter customers that are processed by TAP. This must be a valid SQL filter clause. | Account Additional where clause | None | No |
| % Analyzed for Trans Table | Determines the percent analyzed for one of the intermediate process tables. This needs to be set to 100 for the initial run of TAP. For all subsequent runs, Oracle recommends that this parameter is set to 20. If no value is set, the program assumes a value of 20 internally. | % Analyzed for Trans Table | None | No |

| Parameter Name | Parameter Description | Prompt | Default Value | Required |
|---|---|---|---|---|
| Debug | Set to Yes to write debug messages to Log. This parameter needs to be set only if the concurrent program errors out and debug becomes necessary to find the root cause. | Debug | No | No |
| Trace | Set Yes to turn on trace for the session. This parameter needs to be set only to identify source of performance issues and should be set only if necessary. | Trace | No | No |

**Parameters for Leads**

These are the parameters for the Leads program in the Assign Territory Access Total Mode request set:

| Parameter Name | Parameter Description | Prompt | Default Value | Required |
|---|---|---|---|---|
| Submit Lead TAP | Determines if leads need to be processed as part of the TAP process or not. | Submit Lead TAP | No | Yes |
| Lead Status | Determines processing of leads based on lead status (all, closed, open). | Lead Status | All | Yes |
| Lead Additional where clause | Set to further filter leads that are processed by TAP. This must be a valid SQL filter clause. | Lead Additional where clause | None | No |

| Parameter Name | Parameter Description | Prompt | Default Value | Required |
|---|---|---|---|---|
| % Analyzed for Trans Table | Determines the percent analyzed for one of the intermediate process tables. This needs to be set to 100 for the initial run of TAP. For all subsequent runs, Oracle recommends that this parameter is set to 20. If no value is set, the program assumes a value of 20 internally. | | None | No |
| Debug | Set to Yes to write debug messages to Log. This parameter needs to be set only if the concurrent program errors out and debug becomes necessary to find the root cause. | | No | No |
| Trace | Set Yes to turn on trace for the session. This parameter needs to be set only to identify source of performance issues and should be set only if necessary. | Trace | No | No |

**Parameters for Opportunities**

These are the parameters for the Opportunities program in the Assign Territory Access Total Mode request set:

| Parameter Name | Parameter Description | Prompt | Default Value | Required |
|---|---|---|---|---|
| Submit Opportunity TAP | Determines if opportunities need to be processed as part of the TAP process or not. | Submit Opportunity TAP | No | Yes |
| Opportunity Status | Determines processing of opportunities based on opportunity status (all, closed, open). | Opportunity Status | All | Yes |
| Opportunity Additional where clause | Set to further filter opportunities that are processed by TAP. This must be a valid SQL filter clause. | Opportunity Additional where clause | None | No |
| % Analyzed for Trans Table | Determines the percent analyzed for one of the intermediate process tables. This needs to be set to 100 for the initial run of TAP. For all subsequent runs, Oracle recommends that this parameter is set to 20. If no value is set, the program assumes a value of 20 internally. | | None | No |
| Debug | Set to Yes to write debug messages to Log. This parameter needs to be set only if the concurrent program errors out and debug becomes necessary to find the root cause. | | No | No |

| Parameter Name | Parameter Description | Prompt | Default Value | Required |
|---|---|---|---|---|
| Trace | Set Yes to turn on trace for the session. This parameter needs to be set only to identify source of performance issues and should be set only if necessary. | Trace | No | No |

**Parameters for Quotes**

These are the parameters for the Quotes program in the Assign Territory Access Total Mode request set:

| Parameter Name | Parameter Description | Prompt | Default | Required |
|---|---|---|---|---|
| Submit Quotes TAP | Parameter to determine if quotes are processed as part of the TAP process or not. | Submit Quotes TAP | No | Yes |
| Exclude Ordered Quotes | Exclude ordered quotes for TAP processing. | Exclude Ordered Quotes | No | No |
| Exclude Expired Quotes | Exclude expired quotes for TAP processing. | Exclude Expired Quotes | No | No |
| Quotes Additional where clause | Set to further filter quotes that are processed by TAP. This must be a valid SQL filter clause. | Quotes Additional where clause | None | No |

| Parameter Name | Parameter Description | Prompt | Default | Required |
|---|---|---|---|---|
| % Analyzed for Trans Table | Determines the percent analyzed for one of the intermediate process tables. This needs to be set to 100 for the initial run of TAP. For all subsequent runs, Oracle recommends that this parameter is set to 20. If no value is set, the program assumes a value of 20 internally. | % Analyzed for Trans Table | None | No |
| Debug | Set to Yes to write debug messages to Log. This parameter needs to be set only if the concurrent program errors out and debug becomes necessary to find the root cause. | Debug | No | No |
| Trace | Set to Yes to turn on trace for the session. This parameter needs to be set only to identify source of performance issues and should be set only if necessary. | Trace | No | No |

**Parameters for Proposal**

These are the parameters for the Proposals program in the Assign Territory Access Total Mode request set:

| Parameter Name | Parameter Description | Prompt | Default | Required |
|---|---|---|---|---|
| Submit Proposal TAP | Parameter to determine if proposals are processed as part of the TAP process or not. | Submit Proposal TAP | No | Yes |
| Proposal Additional where clause | Set to further filter proposals that are processed by TAP. This must be a valid SQL filter clause. | Proposal Additional where clause | None | No |
| % Analyzed for Trans Table | Determines the percent analyzed for one of the intermediate process tables. This needs to be set to 100 for the initial run of TAP. For all subsequent runs, Oracle recommends that this parameter is set to 20. If no value is set, the program assumes a value of 20 internally. | % Analyzed for Trans Table | None | No |
| Debug | Set to Yes to write debug messages to Log. This parameter needs to be set only if the concurrent program errors out and debug becomes necessary to find the root cause. | Debug | No | No |
| Trace | Set to Yes to turn on trace for the session. This parameter needs to be set only to identify source of performance issues and should be set only if necessary. | Trace | No | No |

## New Mode

**Responsibility**

Oracle Sales Administrator

**Navigation**

Functions > Current Request > Run > Select Assign Territory Accesses for New Mode

The New Mode for the Assign Territory Access concurrent program performs an incremental update of the latest changes for these business entities:

- Accounts

- Leads

- Opportunities

- Quotes

- Proposals

You can control the update performed through New Mode parameter settings.

> **Note:** The Additional Where Clause takes effect only when there are no territory changes.

**Parameters for New Mode**

These are the parameters for New Mode of the Assign Territory Access Total Mode request set:

| Parameter Name | Parameter Description | Prompt | Default Value | Required |
|---|---|---|---|---|
| Account Type | Determines if customers of type Persons (only) need to be processed or if customers of type Organization (only) need to be processed or both types of customers need to be processed. | Account Type | No | Yes |

| Parameter Name | Parameter Description | Prompt | Default Value | Required |
|---|---|---|---|---|
| Account Additional where clause | Set to further filter customers that are processed by TAP. This must be a valid SQL filter clause. | Account Additional where clause | No | No |
| Lead Status | Set to process leads based on lead status (all, closed, open). | Lead Status | No | Yes |
| Lead Additional where clause | Set to further filter leads that are processed by TAP. This must be a valid SQL filter clause. | Lead Additional where clause | No | No |
| Opportunity Status | Set to process opportunities based on opportunity status (all, closed, open). | Opportunity Status | No | Yes |
| Opportunity Additional where clause | Set to further filter opportunities that are processed by TAP. This must be a valid SQL filter clause. | Opportunity Additional where clause | No | No |
| Exclude Ordered Quotes | Set to exclude ordered quotes from TAP processing. | Exclude Ordered Quotes | No | No |
| Exclude Expired Quotes | Set to exclude expired quotes from TAP processing. | Exclude Expired Quotes | No | No |
| Quotes Additional where clause | Set to further filter quotes that are processed by TAP. This must be a valid SQL filter clause. | Quotes Additional where clause | No | No |

| Parameter Name | Parameter Description | Prompt | Default Value | Required |
| --- | --- | --- | --- | --- |
| Proposal Additional where clause | Set to further filter proposals that are processed by TAP. This must be a valid SQL filter clause. | Proposal Additional where clause | No | No |
| % Analyzed for Trans Table | Determines the percent analyzed for one of the intermediate process tables. This needs to be set to 100 for the initial run of TAP. For all subsequent runs, Oracle recommends that this parameter is set to 20. If no value is set, the program assumes a value of 20 internally. | % Analyzed for Trans Table | None | No |
| Debug | Set to Yes to write debug messages to Log. This parameter needs to be set only if the concurrent program errors out and debug becomes necessary to find the root cause. | Debug | No | No |
| Trace | Set Yes to turn on trace for the session. This parameter needs to be set only to identify source of performance issues and should be set only if necessary. | Trace | No | No |

## Setting Profile Options

The following table displays the profile options associated with TAP.

| Profile Name | Description | Setting Level | Default Value |
|---|---|---|---|
| HZ: Raise API Events | If the value is set to Yes, then changes made to customer records are considered while TAP processing in New Mode. The value must be set to Yes for New Mode TAP to work. | User/Responsibility/Application/Site | No |
| OS: Enable Real Time Customer Assignment | If the value is set to Yes, then resources are assigned as soon as a transaction is created or updated. | Site | No |
| OS: Enable Real Time Opportunity Assignment | If the value is set to Yes, then resources are assigned as soon as a transaction is created or updated. | Site | No |
| OS: Enable Real Time Lead Assignment | If the value is set to Yes, then resources are assigned as soon as a transaction is created or updated. | Site | Yes |

## Tables Used

The following is a list of the read and write tables used in this process.

| Read or Write | Table |
|---|---|
| Read | JTF_TAE_1001_ACCOUNT_TRANS |
| Read | JTF_TAE_1001_OPPOR_TRANS |
| Read | JTF_TAE_1001_LEAD_TRANS |
| Read and Write | JTF_TAE_1001_ACCOUNT_WINNERS |
| Read and Write | JTF_TAE_1001_OPPOR_WINNERS |
| Read and Write | JTF_TAE_1001_LEAD_WINNERS |
| Read | JTF_TAE_1001_QUOTE_TRANS |
| Read | JTF_TAE_1001_PROP_TRANS |

| Read or Write | Table |
|---|---|
| Read and Write | JTF_TAE_1001_QUOTE_WINNERS |
| Read and Write | JTF_TAE_1001_PROP_WINNERS |
| Write | ASO_QUOTE_ACCESSES |
| Write | ASO_TERRITORY_ACCESSES |
| Write | ASO_CHANGED_QUOTES |
| Write | PRP_PROPOSAL_ACCESSES |
| Write | PRP_TERRITORY_ACCESSES |
| Write | PRP_CHANGED_PROPOSALS |
| Read and Write | ASO_QUOTE_HEADERS_ALL |
| Read | JTS_RS_SALESREPS |
| Read | JTF_TERR_QTYPE_ALL |
| Read | JTF_TERR_USGS_ALL |
| Read | JTF_TERR_ALL |
| Read | JTF_QUAL_TYPE_USGS_ALL |
| Read | JTF_QUAL_USGS_ALL |
| Read | JTF_TERR_QUAL_ALL |
| Read | JTF_TERR_QTYPE_USGS_ALL |
| Read | JTF_TERR_VALUES_ALL |
| Read | JTF_TERR_RSC_ACCESS_ALL |
| Read | JTF_TERR_RSC_ALL |

| Read or Write | Table |
|---|---|
| Read | JTF_TERR_CHANGED_ALL |
| Read | JTF_RS_RESOURCE_EXTNS |
| Read | JTF_RS_ROLE_RELATIONS |
| Read | JTF_RS_ROLES_B |
| Read | JTF_RS_ROLES_TL |
| Read | AS_INTERESTS_ALL |
| Read | AS_LEADS_ALL |
| Read | AS_LEADS_LINES |
| Read | AS_LAST_RUN_DATES |
| Read | AR_LOOKUPS |
| Read | HZ_ORGANIZATION_PROFILES |
| Read | HZ_PARTY_SITES |
| Read | HZ_PARTIES |
| Read | HZ_PARTY_SITES |
| Read | HZ_LOCATIONS |
| Read | HZ_CONTACT_POINTS |
| Read | HZ_RELATIONSHIPS |
| Read | FND_PROFILE_OPTION_VALUES |
| Read | FND_PROFILE_OPTIONS |
| Read | FND_USER |

| Read or Write | Table |
|---|---|
| Write | AS_ACCESSES_ALL |
| Write | AS_TERRITORY_ACCESSES |
| Write | AS_CHANGED_ACCOUNTS_ALL |

## Transaction Matching Attributes

Territories have matching attributes, which are parameters that TAP uses to assign opportunities, leads, customers, proposals, and quotes to a sales resource. For example, "State = California" or "Opportunity Amount > 50,000". You can use multiple matching attributes to define a territory.

*Sales Matching Attributes*

| Transaction Type | Territory Matching Attribute | Sales/TeleSales Attribute |
|---|---|---|
| Account | Account Classification | Interest of "party site" |
| Account | Account Hierarchy | "Subsidiary Of" a particular organization |
| Account | Area Code | Area Code |
| Account | City | City |
| Account | City | City |
| Account | Country | Country |
| Account | Company Annual Revenue | Annual Revenue |
| Account | Customer Category | Customer Category |
| Account | Customer Name | Customer Name |
| Account | Customer Name Range | Customer Name |

| Transaction Type | Territory Matching Attribute | Sales/TeleSales Attribute |
|---|---|---|
| Account | DUNS Number | D-U-N-S Number |
| Account | Number of Employees | Total Employees |
| Account | Site Number | Party Site Num |
| Account | Postal Code | Postal Code |
| Account | Product Hierarchy | Product Category |
| Account | Province | Province |
| Account | Registry ID | Party Number or Registry ID |
| Account | SIC Code | SIC Code |
| Account | Sales Partner Of (This attribute is available only for Oracle Incentive Compensation) | Partner Of |
| Account | State | State |
| Lead | Budget Amount | Budget |
| Lead | Lead Product Category | Product Category |
| Lead | Lead Inventory Item | Inventory Item |
| Lead | Lead Source | Source Name |
| Lead | Purchase Amount | Amount |
| Lead | Sales Channel | |
| Opportunity | Opportunity Channel | Sales Channel |
| Opportunity | Opportunity Classification | Classification |

| Transaction Type | Territory Matching Attribute | Sales/TeleSales Attribute |
|---|---|---|
| Opportunity | Opportunity Product Category | Product Category |
| Opportunity | Opportunity Inventory Item | Inventory Item |
| Opportunity | Opportunity Status | Status |
| Opportunity | Total Amount | Total |
| Quoting | Product Category | |

## About Matching Attributes

Matching attributes are the rules that determine where the resources are assigned. Set up is done by system administration when setting up territories.

The following section contains descriptions of matching attributes that can be problematic for users:

- Account Classification

- Account Hierarchy

- Area Code

- Sales Partner Of

- SIC Code

- Customer Category

- Opportunity Classification

### Account Classification

You can define a territory based upon site classification.

#### How to Create Data for Account Classification

1. Create Classification.

   1. Go to the Administration tab.

   2. Click **Interest.**

      **3.**    Create Company Classification.

   **2.**    Classify a site (attach classification to a customer record)

      **1.**    Login to the TeleSales application.

      **2.**    From the eBusiness Center, query the organization.

      **3.**    Click **Details.**

      **4.**    Go to the Site Classification tab.

      **5.**    Enter an interest type.

      **6.**    Go to the Location field and select the address.

      **7.**    Save your work.

   **3.**    Create a territory with an Account Classification matching attribute.

      **1.**    Go to the Territory Administration form.

      **2.**    Define a territory for the Account Classification matching attribute.

      **3.**    From the LOV select the Interest type and codes combination for the classification.

      **4.**    Complete the territory definition.

### How TAP Processes the Account Classification Matching Attribute

If a territory is defined with the Account Classification matching attribute, then TAP finds customer locations who have defined classifications that match the territory definition and assigns resources to them. The Account classification matching attribute will not work unless the Location field is populated.

> **Note:** If a territory is defined as a combination of the Account Classification matching attribute and an address-related matching attribute such as State, Country, or Postal Code, then make sure that the address entered in the Location field in the TeleSales Site Classification tab satisfies the address-related matching attribute.

## Account Hierarchy

You can define territories based upon Parent Subsidiary relationships between organizations.

**How to Create Data for Account Hierarchy**

1.  Create Account Hierarchy

    *   Go to the Customer tab and drill down to the subsidiary organization in the relationship. Select the parent Organization in the relationship and create the Subsidiary Of relationship between the two organizations.

2.  Create a territory with the Account Hierarchy matching attribute.

    *   Go to the Territory Administration form, define a territory for the "Account Hierarchy" matching attribute. From the LOV, choose the subsidiary organization of the relationship as the matching attribute value.

**Example**

If ABC Company is subsidiary of XYZ Company and XYZ Company is Subsidiary of LMN Inc., then:

1.  Drill down to customer detail page for ABC Company.

2.  Create a relationship of "Subsidiary Of" with XYZ Company.

3.  Similarly, drill down to customer detail page for XYZ Company.

4.  Create a relationship of "Subsidiary Of" with LMN Inc.

5.  Go to the Define Territory form and create a territory.

6.  Set up the Account Hierarchy matching attribute as follows: Account matching attribute = ABC Company.

**How TAP Processes Account Hierarchy Matching Attributes**

If there is a parent subsidiary relationship between two organizations, then set up the subsidiary organization as the territory matching attribute value. TAP finds the parent (up in the hierarchy) of the organization that is set as the territory matching attribute and assigns resources to it.

> **Note:** Only parties that have a "SUBSIDIARY OF" relationship with other parties appear in LOV in the Define Territory form.

> **Note:** If the *Create Party Flag* is set to N for the Subsidiary Of relationship, then the relationship type is not available in the Customer tab in the application while creating relationships.

## Area Code

You can define a territory based upon area code.

### How to Create Data for Area Code

1. In the Define Territory form, choose the Area Code matching attribute. There is no LOV associated with this matching attribute.

2. Enter the area code of the primary phone number at any active address or at the header level.

## How TAP Processes Area Code Matching Attribute

If a territory is defined with the Area Code matching attribute, then TAP finds matching records with the customer's primary phone number the same as the matching attribute value.

> **Note:** If a territory is defined as combination of some other address-related matching attribute such as State, Country, or Postal Code and the Area Code matching attribute, then make sure that the phone area code at the address is the same as the value defined for the Area Code matching attribute. If you want to use this matching attribute for opportunity or lead assignment, then make sure that the address attached to opportunities and leads satisfy the matching attribute value.

## Sales Partner Of

You can define a territory based upon the partner assigned to a customer, opportunity, or lead.

### How to Create Data for the "Sales Partner Of" Matching Attribute

1. Create a partner. You can create sales partners through the Partner tab.

2. Assign the Partner to a transaction (customer, opportunities, or leads).

3. Add this partner to the external sales team for the transaction.

4. In the Define Territory form, choose the "Sales Partner Of" matching attribute. From the list of values, choose the partner which is assigned to the transaction in Step 3.

## How TAP Processes the "Sales Partner Of" Matching Attribute

If a "Sales Partner Of" matching attribute is defined, then TAP finds transactions having external sales teams that match the "Sales Partner Of" matching attribute. TAP then assigns resources to these transactions based upon the territory definition.

### Example

ABC Company is partner of LMN, Inc. A customer AAA Insurance is created with address in California (CA) state. Opportunity "Hardware and Consulting" is created for customer AAA Insurance at above address. The user adds partner ABC Company to the external sales team of the opportunity and customer.

Territory T1 is defined with following matching attribute.

Partner_of: ABC Company

State: CA

The following resources are assigned to Territory T1:

- R1

- R2

When TAP runs, it adds R1 and R2 to the sales team of customer AAA Insurance and opportunity "Hardware and Consulting".

> **Note:** If a territory is defined as a combination of some other address-related matching attribute such as State, Country, or Postal Code and the "Sales Partner Of" matching attribute, then the customer, opportunity, or lead address (not partner address) should satisfy all conditions.
>
> Unless the Partner relationship created from the Customer tab of the application corresponds to a resource of category "Partner" in JTF resources, it will not appear in the LOV while defining the matching attribute.

## SIC Code

You can define a territory based upon the SIC Code of a Customer.

### How to Create Data for the SIC Code Matching Attribute

1. Create SIC Types and Codes in AR lookups.

2. Assign the SIC Code Type and appropriate SIC codes to the customers.

3. Define a territory with the SIC Code matching attribute, selecting the SIC type and code from the LOV.

### How TAP Processes the SIC Code Matching Attribute

If the SIC Code matching attribute is defined, then TAP finds customer records that satisfy this condition and assigns resources to it.

## Customer Category

You can define a territory based upon the Category of customer.

### How to Create Data for the Customer Category Matching Attribute

1. Create Customer categories in AR lookups.

**2.** Assign Customer Category to customers.

**3.** Define a territory with the Customer Category matching attribute, selecting the customer category from the LOV.

**How TAP Processes the Customer Category Matching Attribute**

If the Customer Category matching attribute is defined, then TAP finds customer records that satisfy this condition and assigns resources to it.

## Opportunity Classification

You can define a territory based upon the Classification of an opportunity.

**How to Create data for Opportunity Classification**

**1.** Navigate to the Administration tab.

**2.** Create an Opportunity Classification.

**3.** Create an opportunity.

**4.** Enter the Opportunity Classification.

**5.** Create a territory with the transaction type "Opportunity".

**6.** Select Opportunity Classification matching attribute and enter the classification.

**How TAP Processes Opportunity Classification Matching Attribute**

If a territory is defined with the Opportunity Classification matching attribute, then TAP finds matching opportunities and assigns resources to them.

> **Note:** Opportunity classification is different than opportunity product category. For example, TAP will not consider any purchase items entered for the opportunity while processing this matching attribute.

## Troubleshooting

The following section is intended to provide information to help you if you encounter a problem with Territory Assignment Program set ups.

To run diagnostic reports:

**1.** Log into HTML APPS as SYSADMIN/SYSADMIN.

**2.** Select the Diagnostics tab. This opens a new window.

**3.** Select the Basic tab in the new window.

4. Change the Application to **CRM Foundation**.

5. Select **Territory Management** in the left menu.

6. Click **Run Without Prerequisite**.

7. Click **Report** to see the report details.

The following queries provide additional information:

1. Log files with the Debug option turned On.

2. Trace files in case of performance issues or if the program terminates with errors.

Run tkprof with following options and send us the output files SORT = exeela fchela EXPLAIN = apps/psswd SYS = no

The following table lists output of the related query.

| Query Name | Query |
|---|---|
| Records in HZ_PARTIES | select party_type, count(*)<br><br>from apps.hz_parties<br><br>where STATUS = 'A'<br><br>group by party_type<br><br>select count(*) from hz_party_sites where status = 'A'<br><br>select count(*) from hz_locations |
| Volume of Opportunities and Leads | select count(lead_id) from apps.as_leads_all<br><br>select count(sales_lead_id) from apps.as_sales_leads |
| Volume of Access Records | Select count(*) from AS_ACCESSES_ALL<br><br>Select count(*) from AS_TERRITORY_ACCESSES |
| Volume of Changed Accounts prior to run (required only for New Mode) | Select request_id, sequence, count(*) from AS_CHANGED_ACCOUNTS_ALL group by request_id, sequence |
| Database Parameters | select name, value from V$PARAMETER where UPPER(name) in ('HASH_AREA_SIZE', 'SORT_AREA_SIZE') |

| Query Name | Query |
|---|---|
| Duplicate Active Organization Profiles | select party_id from hz_organization_profiles where sysdate between nvl(effective_start_date, sysdate-1 ) and nvl(effective_end_date,sysdate+1 ) group by party_id having count(*) > 1 |
| Number of ACTIVE Sales Territories | select count(*)<br><br>from apps.jtf_terr_all jta, apps.jtf_terr_usgs_all jtua where jtua.terr_id = jta.terr_id<br><br>and jtua.source_id = -1001<br><br>and jta.start_date_active <= SYSDATE<br><br>AND NVL(jta.end_date_active, SYSDATE) >= SYSDATE |
| Number of VALID Sales Territories for Assignment | select jtdr.qual_type_id, count(*)<br><br>from apps.jtf_terr_denorm_rules_all jtdr<br><br>where jtdr.source_id = -1001<br><br>and jtdr.terr_id = jtdr.related_terr_id<br><br>group by jtdr.qual_type_id |
| Number of VALID Sales Territories with Reps for Assignment | select jtdr.qual_type_id, count(*)<br><br>from apps.jtf_terr_denorm_rules_all jtdr<br><br>where jtdr.source_id = -1001<br><br>and jtdr.terr_id = jtdr.related_terr_id<br><br>and jtdr.resource_exists_flag = 'Y'<br><br>group by jtdr.qual_type_id |
| Total # of Territory Resource Assignments | select count(*)<br><br>from apps.jtf_terr_rsc_all jtr<br><br>where jtr.start_date_active <= SYSDATE<br><br>AND NVL(jtr.end_date_active, SYSDATE) >= SYSDATE<br><br>AND EXISTS ( SELECT jtdr.terr_id<br><br>FROM jtf_terr_denorm_rules_all jtdr<br><br>WHERE jtdr.source_id = -1001 ) |

| Query Name | Query |
|---|---|
| Total # of DISTINCT Territory Resources (Total # of Active Reps) | SELECT COUNT (*) FROM (<br><br>select DISTINCT jtr.resource_id, jtr.resource_type<br><br>from apps.jtf_terr_rsc_all jtr<br><br>where jtr.start_date_active <= SYSDATE<br><br>AND NVL(jtr.end_date_active, SYSDATE) >= SYSDATE<br><br>AND EXISTS ( SELECT jtdr.terr_id<br><br>FROM jtf_terr_denorm_rules_all jtdr<br><br>WHERE jtdr.source_id = -1001 ) ) |
| Total Number of Values in System | select count(*)<br><br>from jtf_terr_values_all jtv, jtf_terr_qual_all jtq<br><br>where jtv.terr_qual_id = jtq.terr_qual_id<br><br>and jtq.terr_id IN ( select jt.terr_id from apps.jtf_terr_all jt,<br><br>apps.jtf_terr_usgs_all jtu<br><br>where jtu.source_id = -1001<br><br>and jtu.terr_id = jt.terr_id<br><br>and jt.start_date_active <= SYSDATE<br><br>AND NVL(jt.end_date_active, SYSDATE) >= SYSDATE ) |
| Total Number of Values per each Matching Attributes in System | select jtq.qual_usg_id, count(*)<br><br>from jtf_terr_values_all jtv, jtf_terr_qual_all jtq<br><br>where jtv.terr_qual_id = jtq.terr_qual_id<br><br>and jtq.terr_id IN ( select jt.terr_id from apps.jtf_terr_all jt, apps.jtf_terr_usgs_all jtu<br><br>where jtu.source_id = -1001<br><br>and jtu.terr_id = jt.terr_id<br><br>and jt.start_date_active <= SYSDATE<br><br>AND NVL(jt.end_date_active, SYSDATE) >= SYSDATE )<br><br>group by jtq.qual_usg_id<br><br>order by 1 desc |

| Query Name | Query |
|---|---|
| Total Number of values per Matching Attributes in MV | select mv.qual_usg_id, count(*)<br><br>from jtf_terr_qual_rules_mv mv<br><br>group by mv.qual_usg_id<br><br>order by 1 desc |
| Distinct Matching Attribute Operators | SELECT jtv.comparison_operator, COUNT(*)<br><br>FROM apps.jtf_terr_values_all jtv<br><br>GROUP BY jtv.comparison_operator |

# Setting Up Partners

The Partner subtab provides for the creation and management of information relating to Partner organizations.

Refer to the *Oracle Partner Management Implementation and Administration Guide* for information about setting up Partners.

Partners can be:

- **General Partners:** Have a Partner Of relationship with another organization or person. General Partners include Sales and Exchange Partners.

- **Sales Partners:** Have a specific partner agreement that enables the Vendor to pass a sales deal to that Partner through Oracle Partners Online.

- **Exchange Partners:** Can participate in the opportunity exchange system between multiple Vendors and a Partner.

# Setting Up Marketing Source Codes

Sales applications use marketing source codes to track which marketing activity is responsible for a sale or a sales activity.

Source codes are created by different marketing activities created in Oracle Marketing. This includes campaigns, campaign activities, events, event schedules, one-off events, and offers. The source codes are either created automatically whenever marketers create one of these activities or entered by the marketer manually.

Campaigns and campaign activities are the most important of these marketing activities in Oracle Marketing. Campaigns are constructed using a wide variety of marketing objects. The basic components of campaigns are its theme, the funding (budgets), the

execution (activities), the target audience (lists and marketing mediums), the cost (costs), and response measuring devices (metrics).

Because all campaigns are not created alike, custom setups are available to easily configure campaigns for different activities and marketing channels.

Campaigns often create a hierarchical structure. Campaigns can be divided by geography or by product or by marketing channel. Campaigns are developed using a parent child relationship. A parent campaign can have many child campaigns. A child campaigns can in turn be a parent campaign as well.

Refer to the *Oracle Marketing Implementation Guide* and *Oracle Marketing User Guide* for information on how to set up marketing source codes.

You must also set up the following system profiles:

- *OS: Source Code Mandatory for Leads*

- *OS: Source Code Required for Opportunity*

# Setting Up Incentive Compensation

Oracle Incentive Compensation is an application within the Oracle E-Business Suite. The application can be deployed alone or in combination with other Oracle applications to meet your solution requirements.

Oracle Incentive Compensation enables the configuration approval, and deployment of incentive programs. As sales transactions are received, the appropriate credits are accurately distributed and calculated according to the structure of the organization and the specific agreements that are in place. The sales organization receives feedback on performance and earnings through self-service reports.

Refer to the *Oracle Incentive Compensation Implementation Guide* for information about setting up Incentive Compensation.

# 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 Marketing, and can be defined for a particular inventory item, for an entire category of products, or for an item and a category.

For information on setting up competitor information, see the *Oracle Marketing User Guide*.

# Setting Up Quick Menu

**Responsibility**

System Administrator

**Navigation**

Profiles > System

Set the profile option Customer Care: Start Menu in Quick Menu to TeleSales Quick Menu.

You can create quick menus and add functions to the menu. Only seeded Quick Menu functions carry the context from eBusiness Center to the called form.

# Hiding and Setting Default Tabs

You can determine which tabs a user can view in the eBusiness Center, the Lead Center and the Opportunity Center windows.

You can hide and expose tabs through menu and function exclusions when you set up responsibilities. If you exclude a tab, then that tab is hidden from view. You cannot permanently remove tabs from the eBusiness Center, and you cannot change the order of the tabs.

See the *Oracle Applications System Administrator's Guide* for details.

**Responsibility**

System Administrator

**Navigation**

Security > Responsibility > Define

## Steps:

1. Use Query Enter and Query Run to locate the responsibility.

2. Choose TeleSales in the Application fields.

3. If you want to exclude a tab, then go to the Menu Exclusions tab, Type = Function, and select the tab from the Name LOV.

    **eBusiness Center**

    The tabs available for eBusiness Center are:

    • eBC Overview Tab

    • eBC Dashboard Tab

    • eBC Organization Tab

    • eBC Person Tab

- eBC Address/Phone Tab

- eBC Relationships Tab

- eBC Account Tab

- eBC Lead Tab

- eBC Opportunity Tab

- eBC Quote Tab

- EBC Proposals Tab

- eBC Order Tab

- eBC Event Tab

- eBC Collateral Tab

- eBC Task Tab

- eBC Note Tab

- eBC Service Request Tab

- eBC Contract Tab

- eBC Install Base Tab

- eBC Custom Tab 1

- eBC Custom Tab 2

- eBC Collection Profile Tab

Profile: OTS: Default Tab in eBusiness Center: Sets the tab that appears when the window is opened.

**Opportunity Center**

The tabs available for the Opportunity Center are:

- Opportunity Center Notes Tab

- Opportunity Center Purchase Tab

- Opportunity Center Classification Tab

- Opportunity Center Sales Team Tab

- Opportunity Center Obstacle Tab

- Opportunity Center Task Tab

- Opportunity Center Lead Tab

- Opportunity Center Quote/Order Tab

- Opportunity Center Partner Tab

- Opportunity Center Proposals Tab

- Opportunity Center Contact Tab

- Opportunity Center Closing Tab

Profile: OTS: Default Tab in Opportunity Center: Sets the tab that appears when the window is opened.

If the profile option PV: Require Vendor User (CM) Approval for Manual Routing is set to Yes, then the routing flag is disabled. If it is set to No, then the routing flag is enabled.

**Lead Center**

Tabs available for Lead Center:

- Lead Center Purchase Interest Tab

- Lead Center Contact Tab

- Lead Center Sales Team Tab

- Lead Center Task Tab

- Lead Center Note Tab

- Lead Center Opportunity Tab

Profile: OTS: Default Tab in Sales Lead Center: Sets the tab that appears when the window is opened.

**Universal Search**

Profiles:

- OTS: Default Universal Search Type

- OTS: Default Universal Search Tab

Sets the defaults that appear when the search is opened.

## Restrictions

The following table shows what tabs should be shown or hidden for sales users or non-sales users.

*Sales or Non-sales Users Show or Hide Tabs*

| Tab | Sales User | Non-Sales User |
|---|---|---|
| Overview | Show | Show |
| Dashboard | Show | Show |
| Organization | Show | Show |
| Person | Show | Show |
| Address | Show | Show |
| Relationship | Show | Show |
| Account | Show | Hide |
| Lead | Show | Hide |
| Opportunity | Show | Hide |
| Quote | Show | Hide |
| Proposals | Show | Hide |
| Order | Show | Hide |
| Event | Show | Show |
| Collateral | Show | Show |
| Task | Show | Show |
| Note | Show | Show |

| Tab | Sales User | Non-Sales User |
| --- | --- | --- |
| Collection | Show | Show |
| Service Request | Show | Show |
| Contract | Show | Show |
| Install Base | Show | Show |
| Custom 1 | Show | Show (based on customization) |
| Custom 2 | Show | Show (based on customization |

# Setting Up Custom Tabs

You can create two custom tabs in the eBusiness Center window by modifying the code for the eBusiness Center form and the associated library.

The customization must be made on a view or table which has a reference or intersection with HZ_PARTIES. The fields that can be displayed in the custom tabs are based on this view or table.

You must use public APIs provided by Oracle to perform transactions against this table. Code for Insert, Update, and Delete is built into these APIs.

All steps must be performed every time you change your custom forms or libraries.

## Prerequisites

❒ Knowledge of Forms development, Oracle Applications procedure, and understanding of Oracle coding standards.

❒ Back up these custom forms and libraries before applying any Oracle TeleSales patches that include these files as these are overwritten in `$AU_TOP/forms/US` and `$AU_TOP/resource.` After the patch is applied, copy the customized files back to these directories and run **adadmin** to generate Oracle TeleSales forms and libraries.

### Steps:

1. Customize the form:

- Create a Data block with all the fields that are needed for displaying in the custom tab. This must be done in the form ASTCUTM1.fmb or ASTCUTM2.fmb.

- *On Insert* trigger must be coded for the data block to insert data into the tables with the corresponding public API call.

- *On Update* trigger must be coded for the data block to update data into the tables with the corresponding public API call.

- *On Delete* trigger must be coded for the data block to delete data from the tables with the corresponding public API call.

- The fields in the data block must be placed on the canvas "ASTRCALL_STACKED_CUSTOM1" (if using ASTCUTM1.fmb) or "ASTRCALL_STACKED_CUSTOM2" (if using ASTCUTM2.fmb).

- Any record groups and LOVs must be coded as needed for the fields displayed on the canvas. Out of the box, there are some fields displayed on the canvas for demo purposes. These fields can be removed from the canvas if not needed.

- In order to integrate this with the eBusiness Center, the data block, record groups, and LOVs must be dropped in the "CUSTOM1_OBJ_GRP" (if using ASTCUTM1.fmb) or "CUSTOM2_OBJ_GRP" (if using ASTCUTM2.fmb) object group. This object group is already subclassed into the eBusiness center.

2. Modify the library:

In the library ASTCUTM1.pld and ASTCUTM2.pld, after defining the custom block, ensure that the following procedure is modified to make sure that the navigation occurs correctly to the first item in the tab.

```
AST_CBO_MAN.Define_CBO
(CBO_name => 'CUSTOM1',
 CBO_Blocks => 'CUSTOM1_BLOCK1',
 CBO_first_item => NULL,
CBO_canvases => 'ASTRCALL_STACKED_CUSTOM1',
CBO_popup_windows => NULL,
 CBO_input_params =>'person_party_id,org_party_id,
 relationship_party_id,party_type,party_site
@  _id,cust_acct_id,phone_id,email_id',
                        CBO_grid_items => NULL);
```

The CBO_first_item parameter is left as null intentionally. When new blocks are added to the custom tab, the CBO_FIRST_ITEM parameter should be added so that the screen displays correctly.

Add or change code in the package CUSTOMER_PKG in ASTCUTM1.pld or CUSTOMER_PKG2 in ASTCUTM2.pld to suit your specific needs based on the comments provided in the library.

3. Set up the label for the custom tabs in the eBusiness Center:

Use the Telesales Administrator responsibility and launch the OTS: Quick Codes form. Search for the lookup type called AST_EBC_TAB_Label or the User Name OTS: eBusiness Center Tab Labels. Change the meaning of the lookup code ASTRCALL_ASTCUTM1 (for ASTCUTM1.fmb) or ASTRCALL_ASTCUTM2 (for ASTCUTM2.fmb) to the desired name. This changes the tab name in the eBusiness center.

4. Integration into eBusiness center:

The form can be compiled and run standalone for testing purposes.

To integrate the custom tab into eBusiness center, perform the following steps:

1. Copy the forms ASTCUTM1.fmb and/or ASTCUTM2.fmb to the `$AU_TOP/forms/US` directory in the patched environment.

2. Compile the corresponding library and copy ASTCUTM1.pll and/or ASTCUTM2.pll to the `$AU_TOP/resource` directory in the patched environment.

3. Run the **adadmin** utility to compile AST forms and libraries so that the changes made to the Customer Form and Library are reflected in the eBusiness Center.

# Setting Up Forms Integration with HTML-based Applications

Set the following profile options to enable the start of JSP pages from Forms-based Oracle eBusiness Suite applications:

- **Apps Servlet Agent**: Set this profile option to the URL of the Apache server. For example: `http://ap084sun.us.oracle.com:7777/OA_HTML`

- **OTS: JSP Details from OTS**: Set this profile to yes to enable opening Oracle Marketing when user double-clicks a source code or source name in the eBusiness Center.

- **FUNCTION_SECURITY_REGION**: Set this profile at the Application level for the TeleSales application to: `ASF_FUNC_SEC_REG.` This profile setting is required if you want to be able to view the Oracle TeleSales home page.

# Setting Up Mapping Capability for Addresses in eBusiness Center

You enable agents using the eBusiness Center to obtain maps of any address entered by them for organizations.

To link the application and the mapping service, you must set up the profile option OTS: URL to Display a Map Of The Address at the site level:

For example, you can link to Yahoo Maps by entering the following URL:

```
http://maps.yahoo.com/py/maps.py?BFCat=&Pyt=Tmap&newFL=Use+Address+Below
&addr=$
ADDRESS$&csz=$CITY$%20$STATE$%20$ZIPCODE$&country=$COUNTRY$&Get%20Map=Ge
t+Map
```

If this profile is set, then the agents can double-click the concatenated Map It field and be launched to the mapping service that is the URL entered by you. Agents will see a green hyperlinked square box below the Map It field of the eBusiness Center. This is the link they use to launch the mapping service. If the profile is not set, then the address field is not hyperlinked.

# Setting Up the Universal Work Queue

The Universal Work Queue can specifically integrate with the Lead and Opportunities modules in Oracle TeleSales. Refer to the *Oracle Universal Work Queue Implementation Guide* for information about setting up the Universal Work Queue. This guide describes how the administrator can create new actions, hide actions, and set the drop down order for notes and actions.

If you plan to use the Marketing List node in the Universal Work Queue, then refer to the *Oracle Marketing Implementation Guide* for information about setting up campaign activities and target lists. You also assign the campaign activity created in Marketing to a sales agent or sales group. See Setting Up Campaign Assignments, page 4-112.

Set the following profile options:

- **IEU: Desktop: UI: Show Work Panel**: The work panel consists of an action panel where the user can take action on selected records and an information panel where notes are displayed for a selected record. The profile option can be set at the site, application, responsibility, and user levels. The default is No.

  Yes: The work panel appears for lead, opportunity, and marketing list nodes.

  No: The work panel does not appear.

- **IEU: Desktop: UI: Work-Selector Display Style**: This option determines how your work nodes are displayed. The profile option can be set at the site, application, responsibility, and user levels. The default is Hgrid.

  Hgrid: displays nodes in the left panel in an Hgrid view.

  Cascade: displays nodes in a cascading menu on top of the page.

- **IEU: Non-Media: Navigate**: This option determines whether a new application window is opened every time the user selects a new work item. Set to Yes to enable the Universal Work Queue to reuse the same application window when a user selects a new work item. Set to No if you want Universal Work Queue to open a new additional window when users select a new work item. Set to Yes to save computer resources. The profile option can be set at the site, application,

responsibility, and user levels.

- **OTS: UWQ - Auto Launch Lead and Oppty Center**: This is also a user profile. Set to Yes to open Lead Center and Opportunity Center when a new lead or opportunity is created in Universal Work Queue. The profile option can be set at the site, application, responsibility, and user levels.

- **OTS: Use Primary Address To Create Lead in UWQ**: Set to Yes to use the primary address when creating a lead.

- **OTS: Use Primary Address to Create Opportunity in UWQ**: Set to Yes to use the primary address when creating an opportunity. The profile option can be set at the site, application, responsibility, and user levels.

- **OTS: UWQ - Display Source Code and Name for Opportunity Nodes**: Controls the display for opportunities in the Universal Work Queue. Options are None, Source Code Only, and Source Code and Name. The profile option can be set at the site, application, responsibility, and user levels.

- **OTS: Marketing List All Campaigns**: Setting this profile to "No" displays only your own lists in Universal Work Queue. A setting of "Yes" displays all lists in Universal Work Queue. The profile option can be set at the site, application, responsibility, and user levels. The default is No.

- **OTS: Number of Active Saved Lists**: Agents can create their own lists using Universal Search and save them to be used in Universal Work Queue. This profile option restricts the number of active lists users can have for each of the following business objects:

  - Collateral

  - Customer Key

  - Event

  - Lead

  - Opportunity

  - Organization

  - Party Relationship

  - Person

  - Quote

  - Smart Search

- Source Code

The default value for each is 10. The user is prevented from saving a new list when the maximum number of active lists is reached.

- **OTS: Number of Records Per Saved List** Sets the maximum number of records a user can save when saving a search performed in Universal Search as a list. The default is 100. What records are saved depends upon the sort order for the search.

When a user logs into Universal Work Queue, the user is enabled to work on the type of work items to which his or her assigned responsibilities provide access unless you limit user access to certain functionality by setting values for the Universal Work Queue profile options. The following profile options control what nodes can be seen in Universal Work Queue and in what order. They can be set at all levels and each user can set these as personal profiles.

| Profile | Description |
| --- | --- |
| IEU: Queue: Inbound Email | Determines if user can view counts of inbound e-mail in UWQ. |
| IEU: Queue: Inbound Telephony | Determines if a user can work on Inbound Telephony queues in UWQ. |
| IEU: Queue: Leads | Set to Yes to allow the user to work on leads that belong to him as the owner. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No. |
| IEU: Queue: Marketing Lists - Manual Assignments | Determines if a user can work on Marketing Lists - Manual Assignments in UWQ. |
| IEU: Queue: My Team Opportunities | Set to Yes to allow the user to work on opportunities that belong to his sales team. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No. |
| IEU: Queue: My Tasks | Determines if a user can work on My Tasks in UWQ. |
| IEU: Queue: My Team Leads | Set to Yes to allow the user to work on leads that belong to his sales team. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No. |

| Profile | Description |
| --- | --- |
| IEU: Queue: Opportunities | Determines if a user can work on Opportunities in UWQ. |
| IEU: Queue: Outbound Telephony | Determines if a user can work on Outbound Telephony queues in UWQ. |
| IEU: Queue: Personal List: Contacts | Determines if a user can work on a contacts personal list. Default is Yes at all levels. |
| IEU: Queue: Personal List: Opportunities | Determines if a user can work on an opportunities personal list. Default is Yes at all levels. |
| IEU: Queue: Quotes | Determines if a user can work on Quotes in UWQ. |
| IEU: Queue: Service Requests | Determines if an user can work on Service Requests in UWQ. |
| IEU: Queue: Tasks | Determines if a user can work on Tasks in UWQ. |

## Changing the Order of Items in the Work Queue.

If you want to change the order of work queue items you can set the following profiles to a sequence of numbers that reflect the order in which you want them to be presented.

For example, if you assign IEU: Queue Order: My Team Leads to 1 and IEU: Queue Order: My Team Opportunities to 2, then all the leads with you on the sales team are listed first in the Universal Work Queue under the heading My Leads (Sales Team). All of your opportunities are listed second under the heading My Opportunities (Sales Team).

The following profiles determine the order the item appears on the work queue. Set these profiles to the sequence you want items in the work queue:

| Profile | Work Queue Item |
| --- | --- |
| IEU: Queue Order: Inbound Email | Email |
| IEU: Queue Order: Inbound Telephony | Inbound call queue |

| Profile | Work Queue Item |
|---|---|
| IEU: Queue Order: My Team Leads | My Leads (Owner): All leads you own |
| IEU: Queue Order: Marketing Lists - Manual Assignments | Marketing Lists |
| IEU: Queue Order: My Tasks | My Tasks |
| IEU: Queue Order: My Team Leads | My Leads (Sales Team) |
| IEU: Queue Order: My Team Opportunities | My Opportunities (Sales Team) |
| IEU: Queue Order: Opportunities | My Opportunities (Sales Credits) |
| IEU: Queue Order: Personal List: Contacts | Personal List - Contacts |
| IEU: Queue Order: Personal List: Opportunities | Personal List - Opportunities |
| IEU: Queue Order: Outbound Telephony | Outbound call queue |
| IEU: Queue Order: Quotes | Quotes |
| IEU: Queue Order: Service Requests | Service Request |
| IEU: Queue Order: Tasks | Tasks |

## Creating a Media Action

Use this procedure to create a media action for inbound telephony for Oracle TeleSales.

**Responsibility**

Call Center HTML Administration

**Steps**

1. From the Oracle Interaction Center Server Manager, select the UWQ Media Action tab.

2. Enter the following information for the media action.

   • In the Media Type field, select Inbound Telephony.

- In the Classification field, type in the name of the media item classification that triggers the media action (screen pop).

- In the Media Action field, select the business application that starts when a media item of the specified type with the specified classification is selected from a work queue.

3. Click **Update**.

# Setting Up Marketing Events

In Oracle Marketing the administrator has the ability to set up confirmation letters for event registration that are fulfilled automatically upon registration. The confirmation letter is fulfilled in addition to any collateral or cover letter selected in Oracle TeleSales. See to the *Oracle Marketing Implementation Guide* for more information.

Use this procedure to set up events.

## Prerequisites

❐  You must be set up as a user for Oracle Marketing.

❐  You must have the URL for Oracle Marketing.

### Steps:

1. Create events according to the *Oracle Marketing User Guide.* You can use event schedules or single events in the sales applications. Make sure of the following:

   - The event you create is active and you specify the event start date and end date.

   - You must enter a valid registration start date and end date. The registration start date cannot be earlier than today's date.

   - The Registration Required flag must be set in order to register in an event.

2. Log into Oracle applications again as a System Administrator.

3. Navigate to Profile > System.

4. Set the following profiles:

   - **OTS: Default Event Reply to Email Address:** Enter the email address you want event enrollees to use for replying to enrollment confirmation e-mails.

   - **OTS: Default Event Subject Line:** Enter the subject line for the enrollment

confirmation email.

# Setting Up Marketing Collateral

Use this procedure to set up collateral for Oracle TeleSales. This includes collateral sent with events. You can set up either physical collateral such as brochures, books, compact disks, or electronic collateral which consist of e-mails and other files you create. Physical collateral is managed through Oracle Inventory. Physical collateral kits can be set up in Marketing and sent using TeleSales. Perform collateral setup in Oracle Marketing. Note that Oracle Marketing uses the term deliverable instead of collateral, so you must follow the procedures for creating deliverables.

## Prerequisites

❐  You must complete Marketing Campaign implementation before setting up collateral.

❐  You must complete an Oracle Inventory implementation before setting up physical collateral.

❐  You must be set up as a user for Oracle Marketing.

### Steps:

1.  Set up the following system profile options:

    • AMS: Default Collateral Order Type. This profile option defaults the order type that was set up in Order Management or collateral fulfillment.

    • OTS: Default Shipping Method for Electronic Collateral. This profile sends the default fulfilment method for electronic collateral.

    • OTS: Default Shipping Method for Physical Collateral. This sets the default shipping method which can be changed by the agent sending collateral.

    • OTS: Default Cover Letter for Collateral Requests. This profile assigns a default cover letter for sending electronic collateral.

    • OTS: Default Collateral Printer Name. If you want to print collateral, then enter the network printer name.

    • AMS: Should Call To Inventory Modules To Be Made. Set to Yes

    • AMS: Should Call To Pricing Modules To Be Made. Set to Yes

- OTS: Default Collateral Reply To Email Address. This setting is required for sending electronic collateral. Enter the e-mail address you want collateral recipients to use when replying with collateral confirmation e-mail.

- OTS: Default Collateral Subject Line. This setting is required for sending electronic collateral. Enter the subject line you want collateral recipients to use when replying with collateral confirmation e-mail.

2. If you are creating physical collateral then:

   1. Set the profile AMS: Item Validation Master Organization to your inventory organization.

   2. Log into Oracle Marketing HTML interface.

   3. Create the deliverable in the Create Deliverable window of Oracle Marketing selecting the Physical radio button.

   4. After you create the deliverable, navigate to the Inventory Item and Kit side panel menu item and note down the part number from the Part Number read only field. This automatically-generated part number starts with the letters DELV.

   5. If you want to send physical collateral through order management, then set the profile option Default Collateral Order Type to default the order type that you set up to fulfill collateral orders through Oracle Order Management.

   6. Navigate to Inventory > Items >Master Items.

   7. Select the inventory organization for your collateral. You must select the inventory organization set up as the default organization in Oracle Marketing.

   8. You can also customize the inventory organization for your collateral by choosing the inventory organization in the system profile option OTS: Collateral Organization. If this profile is not set, then the inventory organization is defaulted to the OE_ORG_ID profile option. This determines what items appear in the collateral inventory items and shipping method LOVs.

      Also, if this profile is set, then when a user attempts to select event collateral that is restricted by operating unit access, the user will receive this error message:

      *The collateral associated with the selected event does not belong to your accessible Operating Unit(s). Please select a different event.*

   9. Use the Item List of Values (LOV) to enter the Item. As the LOV lists all of the items in your inventory, you can limit your search to DELIV%.

10. If the collateral is going to be shipped from multiple warehouses, then from the Tools menu choose Organization Assignment and assign the appropriate warehouses. See *Oracle Inventory User's Guide* for more information.

11. On the Main tab, use the Lists of Values (LOVs) to enter Each as the unit of measure, Finished good as the User Item Type, and Active as the status. The Both radio button is selected by default.

12. On the Inventory tab, select the Inventory Item, Stockable, and Transactable boxes.

13. On the Costing tab, select the Costing Enabled, Inventory Asset Value, and Include in Rollup boxes.

14. On the Purchasing tab, select the Purchased and Purchasable boxes.

15. On the Order Management tab, select the Customer Ordered, Customer Orders Enabled, and Shippable radio buttons and enter the default shipping organization.

16. On the Invoicing tab, select the Invoicable Item and Invoice Enabled boxes.

17. Click **Save** on the toolbar.

18. Navigate to Inventory >Transactions > Miscellaneous Transactions.

19. Use the Type LOV to enter Miscellaneous receipt.

20. Click **Transaction Lines**.

    The Miscellaneous Receipt window opens.

21. Use the LOV to enter the item.

22. Use the Sub Inventory LOV to enter Stores.

23. Enter the quantity of the item in inventory.

    > **Note:** You must enter a quantity for the item in Inventory. Entering a quantity in Oracle Marketing is not sufficient.

24. Use the Account Alias LOV to enter Miscellaneous.

25. Save your work.

3. If you are creating electronic collateral then:

1. Follow the procedures described in the *Oracle One-to-One Fulfillment Implementation Guide.* This chapter explains both how to set up the fulfillment server and how to create your electronic collateral ready for mail merge.

2. Create the deliverable in the Create Deliverable window of Oracle Marketing selecting the Electronic radio button.

3. After you create the deliverable, navigate to the Inventory Item and Kit side panel menu item and note down the part number from the Part Number read only field. This automatically-generated part number starts with the letters DELV.

> **Note:** If no part number appears, then the collateral item is not available in Oracle TeleSales.

# Setting Up Class Types

Interest Types can be used to classify organization sites in the Organization Details window and to classify opportunities in the Classification tab of the Opportunity Center. An interest type can represent any classification of products.

The Interest Type classification has three layers:

- Class Type

- Primary Class Code

- Secondary Class Code

Use the following procedure to define Class Types.

**Responsibility**

TeleSales Administrator

**Navigation**

TeleSales Administration > Sales > Sales Category > Sales Class Type

## Steps:

The Sales Class Types page opens.

1. To search for a class type:

    1. Select a type from the drop down list.

    2. Enter a description.

3. Check all applicable boxes to indicate where the classification is to be used (Account Classification, Opportunity Classification, Globally Enabled).

4. Click **Search**.

2. To create a new class type:

   1. Select the first blank Type field and enter the name of the new class type. This is a required field.

   2. Optionally, enter a description.

   3. Check all applicable boxes to indicate where the classification is to be used (Account Classification, Opportunity Classification, Globally Enabled).

   4. Select the Globally Enabled box to indicate that the classification is to be activated throughout the entire implementation.

      You can create a class type without enabling it at either the global or organization level, however, this class type will not be available for use. The intent is to be able to create class types that can be enabled at a later time.

3. Click **Update** to save your work.

## Setting Up Class Codes

For every class type you can have two levels of class codes: primary and secondary. If you are defining class types to classify your company's products, use the primary code to identify large groupings of products. For example, for a computer company you might use the primary codes computers, peripherals, connectors, printers, and so on. You might then use the secondary codes for product families such as desktops, laptops, modems, or printers.

Use the following procedure to modify and create class codes. These are only used to classify an organization site in Organization Details and to classify opportunities in the Classification tab of the Opportunity Center.

**Responsibility**

TeleSales Administrator

**Navigation**

TeleSales Administration > Sales > Sales Category > Sales Class Code

**Steps:**

The Sales Class Codes page opens.

1. To search for a Sales class type:

    1. Select a class type from the drop down list.

    2. Click **Search**.

2. To create a new primary class code:

    1. Enter the class code for the class type you want to set up. This is a required field.

    2. Enter a description.

    3. Select the Enabled box, if applicable.

3. To create a new secondary class code:

    1. Click the Primary Code link.

    2. Enter the class code.

    3. Enter a description.

    4. Select the Enabled box, if applicable.

4. Click **Update** to save your work.

# Setting Up Scripting

Follow the instructions in the *Oracle Scripting Implementation Guide* and *Oracle Scripting User Guide* to set up scripts for your agents.

- If you want the script launched automatically when a call is received and if there is a script associated with the source code, then set the following profile options:

    Set OTS: Script Launch on UWQ Delivery to Yes

    Set OTS: Script Launch on Interaction to Yes

    Set OTS: Scripting Installation to Yes

- If you want the script launched automatically when an interaction is started in eBusiness Center and if there is a script associated with the source code, then set the following profile options:

    Set OTS: Script Launch on Interaction to Yes

    Set OTS: Scripting Installationto Yes

- If you want a default script launched when there is no script associated with the

source code, then additionally set the following profile option:

Specify the name of the script in OTS: Scripting-Default Script.

- If you do not want scripts launched automatically, but want the a script available to launch even if none is associated with the selected campaign, then set a default script using the following profile option:

Specify the name of the script in OTS: Scripting-Default Script.

- You can control who can resume suspended scripts by setting the profile option OTS: Scripting-Apply Security for Suspended Scripts. If set to Yes, then only the agent who suspended the script can resume it. If set to No, then any agent can resume a suspended script.

- You can filter scripts to only show scripts in a specified language by setting the profile option OTS: Scripting Language.

## 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 works with 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 options MO: Default Operating Unit and MO: Security Profile to valid values. These profile option setting are mandatory. Stamping the user's new opportunity with the default operating unit does not limit user access to the opportunity and the stamp is not exposed to the user.

> **Note:** Whether or not you are implementing multiple organization functionality, you must set the profile option MO: Operating Unit.

New account sites and new account relationships are also stamped with the user's default operating unit if the profile option is set. This operating unit stamp is not exposed to the user, however it is displayed on the account details form if the user has access to it through responsibility. These error messages display if MO: Default Operating Unit is not set or is set incorrectly, and the user attempts to create a new account site, or create a new account relationship:

For account site:

*You will not be able to create the Account Site since your default operating unit has not been set or has been set to a value that is not valid. Please contact your System Administrator.*

For account relationship:

*You will not be able to create the Account Relationship since your default operating unit has not been set or has been set to a value that is not valid. Please contact your System Administrator.*

Also, if the profile OTS: Collateral Organization is not set, and the user attempts to select event collateral that is restricted by operating unit access, the user receives this error message: *The collateral associated with the selected event does not belong to your accessible Operating Unit(s). Please select a different event.*

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

# Setting Up Call Center and Advanced Outbound and Advanced Inbound

Your organization may have elected to implement a third-party tool to replace Oracle Advanced Inbound. If that is the case, see the implementation documentation for that tool.

For details on these implementation tasks, refer to the *Oracle Advanced Inbound Telephony Implementation Guide.*

For Setting up Oracle Advanced Outbound, refer to the *Oracle Advanced Outbound Telephony Implementation Guide.*

If you are planning to use direct telephony integration, then the following steps do not apply to you. Go instead to Setting Up Direct Telephony Integration, page 4-109.

### Steps:

1.  Install Interaction Center Server Manager.

2.  Define the Oracle Interaction Center server group. You can turn the icWorkController on or off for a particular server group. Turn it off if you are using a third party softphone or agents will use teleset only.

3.  Define and configure the Oracle Interaction Center server processes.

4.  Configure Oracle Universal Work Queue for inbound telephony.

5.  Verification using the switch simulator.

6.  Define and configure CTI middleware.

7. Map IVR data to fields in Oracle Applications.

   TeleSales can screen pop the eBusiness Center using the following numbers:

   - Account Number

   - Invoice Number

   - Event Registration Confirmation Number

   - Collateral Request Confirmation Number

   - Party Number: this is the number representing the party, not the party id.

   - Relationship Number

   - Order Number

   - Quote Number

   - Marketing Pin

   - Contract Number

   - Service Request Number

   - Service Key

8. Set up routing for inbound calls.

9. Set up classifications.

10. Set up media action and classification.

11. Install Oracle Call Center Connectors.

## Setting Up Direct Telephony Integration

Without direct telephony integration, a typical customer care inbound call requires the existence of Oracle Telephony Manager (OTM) and Universal Work Queue (UWQ) to handle agent login and the screen pop process. With direct telephony integration, the eBusiness Center form of Oracle TeleSales handles the login process, and a Java bean listens for screen pop events coming directly from an AST Java applet. Users who have telephony set up through OTM and UWQ do not need to change anything. However, the profile option Customer Care: Telephony Screen Pop Mode is available for users who want to make use of the direct telephony integration feature. This feature requires an adapter, whose purpose is to facilitate communication between the form and a third-party softphone. To build this adapter, use the information in this section and

refer to the *Oracle Telephony Adapter SDK Developers Guide* for additional details.

For direct telephony integration, this release does not support multiple interactions such as both an offline interaction and a simultaneous online interaction for an agent. Another example of an unsupported multiple interaction is a "warm transfer," the ability to transfer caller information between agents, which is a feature of Oracle Advanced Inbound.

## Design Requirements

This design of direct telephony integration requires that the following statements are true:

- IVR and telephony are set up properly.

- The data passed to Oracle TeleSales from telephony is in name: value format.

- At a given site, any one of the UWQ integrations or Direct integration works.

- Ranking of parameters that are used to query the eBusiness Center form is in the following sequence:

  AccountCode/AccountNum

  ContactNum o CustomerNum

  QuoteNum

  OrderNum

  ContractNum

  ServiceRequestNum

  CustomerID

  occtANI

## Ranking Logic

The eBusiness Center is queried based on party_id. This party_id is derived from the previous interaction key parameters that are passed to Oracle TeleSales. The first valid party_id is derived from these parameters in the order provided above. The ranking logic is such that after a valid party_id is found, the system ignores the other parameters in this order. If none of the parameters is valid, then the Universal Search window is displayed.

## Setup Steps

Here are the basic setup steps for direct telephony integration:

1. Set profile Customer Care: Telephony Screen Pop Mode to the value Direct.

2. Set profile OTS: Enable Integrated Telephony Login to the value Yes.

3. Set up Interactive Voice Response (IVR).

4. Set up telephony.

## Login Sequence for the eBusiness Center Window

Here is the login sequence for a eBusiness Center window that has been enabled for direct telephony integration:

1. An agent logs in to the CTI client softphone in an unavailable status (so that the agent does not immediately start receiving phone calls).

2. The agent logs in to Oracle Applications and opens Oracle TeleSales.

3. The agent chooses Telephony Login from the Tools menu.

4. The agent enters the extension in the Teleset Details window.

5. The eBusiness Center Refresh Utility sends the telephony login message to the CTI switch.

6. The CTI switch enables the CTI softphone.

   > **Note:** Agents can also log into Oracle Applications before logging into the CTI client. In this case, the agents must manually make themselves available on the CTI client.

## Call Flow Sequence for the eBusiness Center Window

Here is the flow for incoming calls:

1. An agent accepts a call on the CTI softphone.

2. The softphone sends an XML message with the customer information to the eBusiness Center Refresh Utility and puts itself into an unavailable mode.

3. The eBusiness Center window is refreshed based on the supplied parameters. If multiple parties match, then the application displays the matches for agents to choose. If no parties match the parameters, then the application displays a Universal Search window. The Refresh Utility puts itself into an unavailable mode.

4. When an agent ends the interaction, either by doing a call wrap up or by clicking

the End Interaction icon in the toolbar, the utility sends the end interaction message to the CTI softphone causing it to become available again.

# Setting Up Campaign Assignments

This section applies to TeleSales with Oracle Advanced Outbound or Universal Work Queue Marketing List.

In this step you assign marketing campaign activities to individual sales agents or to sales groups. The sales groups are those groups or resources you created using Oracle Resource Manager, a component of Oracle Trading Community Architecture. Marketing campaign activities are created using Oracle Marketing.

You can either assign campaign activities to individual agents or sales groups or assign agents or sales groups to individual campaign activities. Both procedures outlined below accomplish the same goal.

### Assigning Campaign Activities to Agents:

Use this procedure to assign campaign activities to agents or groups of agents.

**Responsibility**

Sales Administrator

**Navigation**

Administration > Sales > Call Center > Campaign Assignments

1.  If you want to assign campaign activities to individual agents, then under the Assign to heading:

    1.  Select the Resource radio button.

    2.  Click **Go**.

        The Resource LOV appears.

    3.  Enter the individual's last name or a partial name in the text box. You can use the % sign to substitute for missing characters.

    4.  Click **Go**.

    5.  Select the individual's name from the list.

2.  If you want to assign campaign activities to sales groups, then under the Assign to heading:

    1.  Select the Resource Group radio button.

    2.  Click **Go**.

3. Enter the group's name or partial name in the text box. You can use the % sign to substitute for missing characters.

4. Click **Go**.

5. Select the group's name from the list.

3. To assign campaign activities to the individual or group:

   1. Click **Add Campaign**.

   2. Click **Go**.

   3. Select the name of the campaign activity you want to assign.

   4. Click **Update**.

   5. Repeat this procedure for each campaign activity you want to assign.

## Assigning Agents to Campaign Activities:

Use this procedure to assign sales agents or sales groups to marketing campaign activities.

**Responsibility**

Sales Administrator

**Navigation**

Administration > Sales > Call Center > Agent Assignments

1. If you know the campaign activity name, then next to the name click **Go**.

   A list of campaign activities appears.

2. You can also search by entering the name or a partial name of the campaign activity in the Campaign Activity Name field. You can use the % sign to substitute for missing characters and click **Search**.

3. Select the campaign activity from the list and click **OK**.

4. If you want to assign an individual agent to the campaign activity, then under the Assign to heading:

   1. Click **Add Resource**.

   2. Click **Go**.

   3. In the Resources LOV, enter the individual's last name or a partial name in the

text box. You can use the % sign to substitute for missing characters.

4. Click **Go**.

5. Select the individual's name from the list.

5. If you want to assign sales groups to the campaign activity, then under the Assign to heading:

   1. Select the Resource Group radio button.

   2. Enter the group's name or partial name in the text box. You can use the % sign to substitute for missing characters.

   3. Click **Go**.

   4. Select the group's name from the list.

6. Click **Update**.

7. Repeat this procedure for each campaign activity you want to assign.

# Enabling Oracle Email Center

A Telesales Agent can click an e-mail address in Oracle TeleSales to open an e-mail addressed to the customer and send it through the Email Center. The e-mail is then recorded as an interaction. Perform the following tasks to enable Email Center.

### Steps:

1. Perform the implementation steps per Oracle Email Center documentation.

2. Set the system profile option OTS: Enable Email Center Integration to Yes.

3. For each TeleSales Agent, perform the following steps in Resources:

1. Select iCenter for Role Type.

2. Select eMail Center Agent for Roles.

# Enabling Interaction Tracking and Wrap-up

Oracle TeleSales can track customer-related interactions by agents and record the outcome of those interactions, the wrap-up.

## Interaction Overview

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

The interaction records an activity whenever an agent:

- Creates a new party of any party type.

- Creates a lead

- Ranks a lead

- Declines lead

- Creates an opportunity

- Closes an opportunity

- Enrolls customers or prospects in an event

- Cancels enrollment

- Sends collateral

- Creates a task

- Queries and views a record

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

Actions:

- Item added

- Lead ranked

- Lead declined

- Opportunity closed

- Event enrollment

- Event enrollment cancelled

- Item Sent

- Query

Action Items:

- Customer

- Lead

- Opportunity

- Event

- Collateral

- Task

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

You can set up Oracle TeleSales to track interactions automatically. Automatic tracking starts whenever an agent queries up or modifies a customer record and ends when an agent queries up a record belonging to another party or closes the form where the interaction began.

You can set up interactions to require agents to record the outcomes of their interactions with customers in a wrap-up window or merely record a default outcome.

**How the Application Tracks Interaction Activities for Party Relationships**

Interaction activities recorded for any of the party types which make up a party relationship are recorded as being part of the same interaction. For example, if an agent starts tracking an interaction with *Jim Jones: the CEO of Acme Corp.*, then any activity related to any of the following parties are treated as part of the same interaction.

- Jim Jones

- Acme Corp.

- Jim Jones: the CEO of Acme Corp.

Switching between any of these parties does not close the interaction.

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

creates three parties in the customer model: Jim Jones (party type of Person), Acme Corp. (party type of Organization), and Jim Jones CEO of Acme Corp. (party type of Party Relationship).

## Setting Up Interaction Tracking

To set up interaction tracking you must:

1. Set up the system profiles telling the application what activities you want interactions to track. See Deciding What Actions You Want Interactions to Track, page 4-117.

2. If desired, set up automatic interaction tracking. Setting Up Oracle TeleSales to Track Interactions Automatically, page 4-120.

3. If you are implementing Oracle Advanced Inbound or Oracle Advanced Outbound and want agents to be able to see their call statistics in the Wrap Up window, then perform the implementation steps in the *Oracle Interaction Center Intelligence Implementation Guide.*

4. If you want agents to record the outcomes of their interactions on the wrap-up window, then:

   1. You must create the categories of outcomes, results, and reasons the agents will use for their call wrap-up. See Creating Outcomes, Results, and Reasons for Call Wrap-Up, page 4-122.

   2. Optionally, you can restrict different outcomes to different campaign activities. This way agents working on different marketing campaigns can have access to a different list of outcomes. See Assigning Outcomes to Campaign Activities, page 4-123.

## Deciding the Actions You Want Interactions to Track

You must set up the following profile options which control the activities interactions to be tracked. This applies to both manual and automatic interaction tracking.

- **OTS: Interactions-Generate Collateral Activity**: Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to collateral.

  No: Disables interaction tracking for the creation of collateral orders.

- **OTS: Interactions-Generate Customer Activity**: Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to customer records.

No: Disables tracking of activities related to customer records.

- **OTS: Lead and Opportunity Center Party Relationship Interaction**: Default setting: No.

  This profile enables the capture of interactions in the Lead and Opportunity Centers at the party relationship level.

  No: Only organization level interactions are created.

  Yes: Party relationship level interactions can be created.

- **OTS: Interactions-Generate Event Activity**: Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to events.

  No: Disables tracking of activities related to events.

- **OTS: Interactions-Generate Lead Activity**: Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to leads.

  No: Disables tracking of activities related to leads.

- **OTS: Interactions-Generate Opportunity Activity**: Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to opportunities.

  No: Disables tracking of activities related to opportunities.

- **OTS: Interactions-Generate Query Activity**: Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Records queries as activities. The profile *OTS: Interactions-Start On Query* determines if an interaction starts upon query. If it is set to No, then an interaction must already be started before the query in order for the query to be recorded.

  No: Disables tracking of queries.

- **OTS: Interactions-Generate Service Request Activity**: Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Tracks activities related to service requests.

  No: Disables tracking of activities related to service requests.

- **OTS: Interactions-Generate Task Activity**: Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

Yes: Records the creation of new tasks.

No: Disables the recording of task creation.

- **OTS: Interactions-Default Outcome**: Default setting: Maintenance

  This profile determines the default value of the Outcome field in the wrap-up window.

  This is also the value the application uses for outcomes of interactions that are ended automatically. The application uses this value if there is no outcome associated with the campaign activity for this interaction. If there is a campaign associated with the interaction, then the application uses the outcome for that campaign activity.

  If the default value for the profile option is removed, then the application functions as if the value is *Outcome with outcome id = 1 (No Answer).*

- **OTS: Interactions-Default Action**: Default setting: Interact with the Item

  Users must perform at least one activity for the interaction to end. If user doesn't perform any activity but ends the interaction anyway, then the application uses the default action set in this profile and the default action item from the profile OTS: Interaction -Default Action Item.

  If the default value for the profile option is removed, then the application functions as if the value is *Query.*

- **OTS: Interactions-Default Action Item**: Default: Customer

  The application uses the default action item set in this profile together with the default action set in the profile OTS: Interaction -Default Action whenever the user does not perform an action required to wrap up an interaction.

  If the default value for the profile option is removed, then the application functions as if the value is the module name where the interaction is started. For example, if an interaction is started in opportunity center, then it is *Opportunity.*

- **OTS: Interactions-Record Media Item ID**: Default setting: Yes (If the default setting is removed, then the application operates as if the profile is set to Yes.)

  Interactions track different types of communications with customers including e-mail and phone calls placed using Oracle inbound and outbound telephony applications. The record includes a unique identifier for the communication. This profile determines if that unique identifier is recorded or not. This identifier is never displayed for the user.

  A setting of Yes records the identifier. A setting of No does not record the identifier.

- **OTS: Max Interactions Displayed**: Default setting: 10 (If the default setting is removed, then the application operates as if the profile is set to 10.)

Determines how many interactions to display in the overview tab.

- **OTS: Number of Months to View Notes and Interactions**: Default setting: 1 (If the default setting is removed, then the application operates as if the profile is set to 1.)

  This is the number of months of notes or interactions to view.

- **OTS: Generate Query Activity**: Default setting: No (If the default setting is removed, then the application operates as if the profile is set to No.)

  Yes: Records the account number with any recorded interaction.

  No: Does not record the account number for an interaction.

## Setting Up Automatic Interaction Tracking

To track interactions automatically, you must set up the following additional system profiles:

- **OTS: Interactions-Enable Automatic Start:** The default setting No (if the default setting is removed, then the application operates as if the profile is set to No). A Yes setting for this profile option enables automatic interaction tracking within Oracle TeleSales. A setting of No limits agents to starting interactions manually.

- **OTS: Interactions-Start on Query:** The default setting No (if the default setting is removed, then the application operates as if the profile is set to No). A setting of Yes starts an interaction whenever the user displays a new record from a different party. For example, if the user is working on an opportunity for AT&T Corp. and opens up a lead from Acme Corp., then the application closes the first interaction and opens up a new one for Acme Corp. If both the opportunity and lead come from AT&T, then no new interaction is started.

  A setting of No starts a new interaction only when the user updates or deletes information in a record or creates a new record for a new party. The user working on an opportunity for AT&T Corp.has to update the lead from Acme Corp. before the application starts a new interaction for Acme. Merely viewing the lead will not close the AT&T interaction.

- **OTS: Interactions-Enable Auto Wrapup:** The default setting No (if the default setting is removed, then the application operates as if the profile is set to No). When this profile is set to No, the wrap-up window appears automatically prompting users to enter the outcomes and reasons for the activity.

  When this profile is set to Yes, then the interaction ends automatically without the users seeing the wrap-up window.

  The interaction ends when:

  - The user starts work on a record from a different party.

Whether this happens on update or query depends on the setting of OTS: Interactions -Start on Query, as described above.

- The user closes the window where the interaction was started.

  For example, if a user starts an interaction while viewing an opportunity in the Opportunity Tab of the eBusiness Center and then opens that same opportunity in the Opportunity Center, then the interaction does not end when the user closes the Opportunity Center. It ends only when the user closes the eBusiness Center.

  > **Note:** The wrap-up screen appears automatically only when users close the form using the close button at the top right hand side of the form. If they close the form using the close button on the toolbar or by choosing Close Form from the File menu, then the interaction is closed automatically without opening the wrap-up window.

- **OTS: Interactions-Enable Change Activity:** The default setting No (if the default setting is removed, then the application operates as if the profile is set to No). Set to Yes to allow allows user to change system recorded activities in the wrap-up window.

**Enabling Automatic Interaction Tracking for Opportunities:**
This example illustrates the use of these profile settings.

For example, if you want to enable automatic interaction tracking for all agent activities relating to opportunities and the tracking to start whenever an agent updates a record. You want the tracking to happen in the background, without the agent having to perform any extra data entry.

You must set the following profile options to the values indicated:

- **OTS: Interactions-Enable Automatic Start:** Setting this profile to Yes enables the automatic tracking.

- **OTS: Interactions-Generate Opportunity Activity:** Setting this profile to Yes enables the tracking of activities related to Opportunities.

- **OTS: Interactions-Start on Query:** Setting this profile to No means that interaction tracking starts only when a record is updated for the first time.

- **OTS: Interactions-Enable Auto Wrapup:** Setting this profile to Yes means that the interaction ends automatically without agents having to make entries in the wrap-up window.

The interaction ends automatically when the agent closes the window where the interaction was first started or changes the object the interaction relates to. For example,

if a user opens up the eBusiness Center and from the Opportunity tab then opens the Opportunity Center, then the opportunity interaction ends when the user starts a new opportunity in the Opportunity Center.

Because the application must record at least one activity for an interaction to end, you must set up the default activity which is recorded if an agent closes a window without performing any of the activities. To set up the default activity, you must set two related profiles OTS: Interactions Default Action and OTS: Interactions Default Action Item.

## Setting up Multiple Simultaneous Interactions

It is possible to track more than one interaction at one time. Each center can track only one interaction at a time, but you can open additional centers and start interactions in each. For example, you can open two Opportunity Centers and one eBusiness Center and start interactions in all three.

**Forms Navigation**

Profiles > System

To track multiple interactions simultaneously, you must set up the following additional system profiles:

- **OTS: Interactions - Maximum multiple interactions**

  Default setting: 1

  Set the maximum number of simultaneous interactions. If you are using Oracle Collections, then set to 1.

- **OTS: Interactions - Prompt for Wrapup**

  Default setting: Yes

  If this profile is set to Yes, then when the user starts a second interaction while a first interaction is already started the user is prompted with "The current [eBusiness/Opportunity/Lead] Center is currently tracking interaction for another party. Would you like to wrap up the interaction?" When the user selects Yes, either auto wrap up proceeds or the wrap up window appears (based on profile setups) and then the next interaction begins in that center. If the user selects No, then the first interaction continues and a new center opens with the next interaction.

## Creating Outcomes, Results, and Reasons for Call Wrap-Up

If you want agents to record the outcomes of interactions with customers using the wrap-up window, then you must populate the different lists of values the agents will use for that purpose. This means setting up the different outcomes, results, and reasons.

You also define valid combinations of outcome, result, and reason for wrap-up. The options that appear in the LOVs in the Wrap-Up window depend on these settings. The combinations can be defined for interaction and activity level. You can also specify

whether an outcome requires a result, and a result requires a reason. The end date deactivates the outcome, result, and reason in LOVs in the Wrap-Up window.

See the *Oracle Customer Interaction History Implementation Guide* for details.

## Assigning Outcomes to Campaign Activities

If you assign outcomes to marketing source codes, then agents who are working with customers classified by different source codes can have different outcome classifications available to them to wrap up calls. For example, you can use Leave message as a possible outcome for a customer satisfaction campaign, but not for a sales campaign.

Although sales agents see all marketing activities as source codes, you must assign the outcomes only to the marketing activity called a campaign activity. Campaign activities must be created in Oracle Marketing.

## Creating Default Wrap Ups

You can create default wrap ups including campaign codes, outcomes, results, and reasons. Then create Action-Activity Type pairs and assign a default wrap up to each pair. See the *Oracle Customer Interaction History Implementation Guide* for details.

A user wrapping up an interaction can accept the default outcome, result, and reason or change them as needed.

## Batch Processing

The collateral history in Oracle TeleSales requires that you periodically run the concurrent program Interaction History Bulk Process to update the history. See the *Oracle Customer Interaction History Implementation Guide* for details.

# Enabling Web Directory Assistance

Use this procedure to enable web directory assistance for agents.

**Responsibility**

Sales Administrator

**Navigation**

Administration > Sales > Call Center > Web Assistance

**Steps:**

1. Click **Create Web Assistance**.

2. Using another browser window, navigate to the web directory assistance service you want to use.

3. Perform a search for any individual. For example, for John Doe in California.

   Keep the page with the results open. You will refer to it for the rest of this procedure.

   For example, navigate to www.superpages.com, select the People Pages tab, and search for John Doe in California.

   The search returns a page with the following URL:

   ```
   http://wpg2.superpages.com/wp/results.phtml?SRC=&STYPE=WS&PS=15&PI=1
   &WF=John&WL=Doe&T=&S=CA&search=Find&pow=0&rtd=wpg1.superpages.com
   ```

4. In the Proxy Host field, enter the name of your organization's proxy server.

5. In the Port field, enter the port number for the proxy server.

6. In the Search URL field, enter the part of the URL before the question mark (?).

   In the SuperPages.com example, you copy and paste the following:
   `http://wpg2.superpages.com/wp/results.phtml`

7. In the Header Constant field, enter the part of the CGI portion of the URL header that remains constant when you perform different searches.

   > **Note:** You might need to perform additional searches to determine what portion of the URL remains constant.

   > In the SuperPages.com example this is:
   > `SRC=&STYPE=WS&PS=15&PI=1.`

8. In the Trailer Constant field, enter the constant part of the URL after the search terms.

   In the SuperPages.com example this is:
   `&search=Find&pow=0&rtd=wpg1.superpages.com.`

9. Enter the switch separator. The switch separator is always the ampersand (&).

10. Enter the URL separator. The URL separator is always the question mark (?).

11. Click **Update**.

12. Click **Detail** for the web assistance you created.

13. Click **CGI Switches**.

14. Create each switch to include in the search. The switches are the CGI script variables used for your search criteria. Each switch is followed by an equals (=) sign. In the SuperPages.com example these are: WF, WL, T, and S. For each switch:

1. Click **Create**.

2. Enter the switch in the Switch Code field. The entry is case sensitive.

3. Enter a number in the Sort Order field indicating the order this switch appears in the URL.

4. Enter plus (+) for the data separator.

5. Select Y next to the search criteria related to this switch. For SuperPages.com WF is used for first name, WL for last name, T for city, and S for state.

6. Set the Enable field to Y. Any disabled switch has a corresponding disabled field on the Directory Assistance page.

7. If user entry for this switch is required by the web assistance service, then select Y for the Required field. Look on the search web page to find out what fields are required. In the SuperPages.com example last name is the required field.

8. Click **Update**.

   The Web Assistance Details page displays the new switch.

15. After testing your settings, set Enabled to Y.

   > **Note:** You can enable only one service at a time.

16. Select yes or no for the directory assistance flag. Only one web directory can be used for directory assistance.

17. Click **Update** to save your changes.

## Setting Up Relationship Plan

Oracle TeleSales uses the relationship plan feature in Oracle TeleService. Relationship plans are available for the party type of organization only. Follow the implementation steps in the *Oracle TeleService Implementation Guide* if you want to implement this feature.

To enable the relationship plan, set the profile option OTS: Relationship Plans - Enable Relationship Plans to Yes.

## Setting Up the Dashboard

Follow the instructions in the *Oracle TeleService Implementation Guide* to set up the dashboard.

# Setting Up the At A Glance Window

The At A Glance window displays a customer's recent activities. The user can launch an action from the summary of information.

## Identify Policies

This is a required step. The information in the window comes from materialized views that are periodically updated. Identify if any policies exist in the following tables. See the topic "Introduction to Fine-Grained Access Control" in the "Implementing Application Security Policies" chapter of the *Oracle 9i Application Developer's Guide - Fundamentals Release 2 (9.2)* for information about security policies.

### Fine-Grained Access Control

Fine-grained access control enables you to build applications that enforce security policies at a low level of granularity. You can use it, for example, to restrict a customer who is accessing an Oracle server to see only his own account, a physician to see only the records of her own patients, or a manager to see only the records of employees who work for him.

When you use fine-grained access control, you create security policy functions attached to the table or view on which you have based your application. Then, when a user enters a DML statement (SELECT, INSERT, UPDATE, or DELETE) on that object, Oracle dynamically modifies the user's statement--transparently to the user--so that the statement implements the correct access control.

### Security Policy

Security policy defines data access. Means you can use to enforce security policies include, but not are not limited to, privileges, roles, the virtual private database feature, and network authentication and authorization.

We are concerned only about Table-based Security Policies for the tables used in the materialized views for the At a Glance feature. Following is a list of tables used in the materialized views for At a Glance that might have table-based security policy functions set up for fine-grained access control:

- ASO_QUOTE_HEADERS_ALL

- ASO_QUOTE_STATUSES_B

- ASO_QUOTE_STATUSES_TL

- AS_INTERESTS_ALL

- AS_INTEREST_CODES_B

- AS_INTEREST_CODES_TL

- AS_INTEREST_TYPES_ALL

- AS_INTEREST_TYPES_B

- AS_INTEREST_TYPES_TL

- AS_LEADS_ALL

- AS_SALES_LEADS

- AS_SALES_LEAD_RANKS_TL

- AS_SALES_STAGES_ALL_TL

- AS_STATUSES_B

- AS_STATUSES_TL

- FND_APPLICATION

- FND_APPLICATION_TL

- FND_LOOKUP_VALUES

- FND_USER

- HZ_CUST_ACCOUNTS

- HZ_PARTIES

- HZ_RELATIONSHIPS

- JTF_OBJECTS_B

- JTF_OBJECTS_TL

- JTF_RS_RESOURCE_EXTNS

- JTF_RS_SALESREPS

- JTF_TASKS_B

- JTF_TASKS_TL

- JTF_TASK_PRIORITIES_TL

- JTF_TASK_STATUSES_B

- JTF_TASK_STATUSES_TL

- JTF_TASK_TYPES_TL

- OE_SALES_CREDIT_TYPES

If policies exist, then perform the following steps:

1. Identify the tables.

2. Set the profile option OTS: At a Glance - Execute User Callouts for Data Refresh to Yes.

3. Customize the MView_Refresh_Pre and MView_Refresh_Post procedures (package body) within the package AST_MVIEW_REFRESH_CUHK.

In order for the materialized view to work correctly, any fine grain access control procedure in effect for the query must return a null policy when the materialized view is being created or refreshed, otherwise error message *ORA-30372 fine grain access policy conflicts with materialized view* displays.

There are five materialized views based on more than twenty tables owned by other products. Since there is no way to control which policy is applied on the tables, the callout AST_MVIEW_REFRESH_CUHK (astchmvs.pls) is added in the create and refresh materialized view logic. If there is any table policy that causes the ORA-30372 error when creating or refreshing the materialized views, you can create your own package body for AST_MVIEW_REFRESH_CUHK to make that policy return NULL or disable the policy in AST_MVIEW_REFRESH_CUHK.Mview_Refresh_Pre, and to rollback the change in AST_MVIEW_REFRESH_CUHK.Mview_Refresh_Post.

Package AST_MVIEW_REFRESH_CUHK is defined as:

```
PACKAGE AST_MVIEW_REFRESH_CUHK AS
PROCEDURE MView_Refresh_Pre(
   p_mview_name   IN VARCHAR2,
   x_return_status         OUT NOCOPY VARCHAR2,
   x_msg_data              OUT NOCOPY VARCHAR2
);
PROCEDURE MView_Refresh_Post(
   p_mview_name   IN VARCHAR2,
   x_return_status         OUT NOCOPY VARCHAR2,
   x_msg_data              OUT NOCOPY VARCHAR2
);
END AST_MVIEW_REFRESH_CUHK;
```

The callouts are used only when the profile option OTS: At a Glance - Execute User Callouts For Data Refresh is set to Yes. MView_Refresh_Pre is called before creating or refreshing each materialized view, and MView_Refresh_Pre is called after creating or refreshing each materialized view. For callouts, only package specification is supplied, so you must implement your own package body for AST_MVIEW_REFRESH_CUHK

before setting the above profile to Yes.

Following is an example of the package body for AST_MVIEW_REFRESH_CUHK:

```
CREATE OR REPLACE PACKAGE BODY AST_MVIEW_REFRESH_CUHK AS
PROCEDURE MView_Refresh_Pre(
   p_mview_name   IN VARCHAR2,
   x_return_status       OUT NOCOPY VARCHAR2,
   x_msg_data            OUT NOCOPY VARCHAR2
) IS
BEGIN
x_return_status := 'S';
x_msg_data := 'Success';
if(p_mview_name = 'AST_QUOTES_MV') then
hz_common_pub.disable_cont_source_security;
end if;
EXCEPTION
when OTHERS then
x_return_status := 'E';
x_msg_data := sqlerrm;
END;

PROCEDURE MView_Refresh_Post(
   p_mview_name   IN VARCHAR2,
   x_return_status       OUT NOCOPY VARCHAR2,
   x_msg_data            OUT NOCOPY VARCHAR2
) IS
BEGIN
x_return_status := 'S';
x_msg_data := 'Success';
if(p_mview_name = 'AST_QUOTES_MV') then
hz_common_pub.enable_cont_source_security;
end if;
EXCEPTION
when OTHERS then
x_return_status := 'E';
x_msg_data := sqlerrm;
END;


END AST_MVIEW_REFRESH_CUHK;
```

## Customize the Menu

This is an optional step. You can customize what appears in the At A Glance window by customizing the existing OTS: At a Glance Display Menu or creating your own menus.

Your created menus can have only the seeded functions for the appropriate business objects. Following is a list of the seeded functions:

| Function Name | User Function Name |
|---|---|
| AST_INTERESTS_MV | At a Glance – Product Interests |

| Function Name | User Function Name |
|---|---|
| AST_OPPORTUNITIES_MV | At a Glance – Opportunities |
| AST_QUOTES_MV | At a Glance – Quotes |
| AST_LEADS_MV | At a Glance – Sales Leads |
| AST_TASKS_MV | At a Glance – Tasks |

The profile option OTS: At a Glance Display Menu assigns what menu is applied to the window for different users. This profile option can be set at the site, application, responsibility and user levels. The default site value is the menu set in the profile option OTS: At a Glance Display Menu.

## Run Concurrent Program

This is a required step.

1. Set the system profile option OTS: At a Glance - Number of Months of Data to Show to 3 or 6 months. Default is 3.

2. Determine what business objects were used in your menus.

3. Run the concurrent program OTS: At a Glance - Refresh Business Objects.

   Parameters: Each business object determined in step 2.

4. Schedule this concurrent program (or set of concurrent programs) to run periodically. The frequency determines the timeliness and accuracy of the information that appears in the At a Glance window. The At a Glance window displays no information while the concurrent program is running.

## Customize the Criteria

This step is optional. You can change the nodes in the summary section which also changes the option in the drop down View lists. Follow the procedure for setting up the dashboard in the *Oracle TeleService Implementation Guide.* Use only the following mapping in the dashboard setup. Only the materialized views listed below should be used in the profile variable queries. Also, dashboard profile variables/checks can be created only for the following dashboard categories.

| Dashboard Category | Materialized View Name | Business Object |
|---|---|---|
| INTERESTS | AST_INTERESTS_MV | Product Interests |
| OPPORTUNITIES | AST_OPPORTUNITIES_MV | Opportunities |
| QUOTES | AST_QUOTES_MV | Quotes |
| LEADS | AST_LEADS_MV | Sales Leads |
| TASKS | AST_TASKS_MV | Tasks |

The profile option OTS: At a Glance - Enable Dashboard Data Refresh at Form Startup controls how the count is displayed in the summary section.

Set to Yes: Runs the Customer Profile Engine concurrent program to refresh the summary section for the queried party every time the At a Glance window is opened by any user. (The window opens more slowly when set to Yes.)

Set to No: You need to add the Customer Profile Engine concurrent program with the following parameters to the schedule to periodically refresh the count information in the summary section. Be sure it runs after the concurrent program OTS: At a Glance - Refresh Business Objects is run.

Parameters: The dashboard groups are your parameters. If you did not customize. then select the following three seeded dashboard groups:

- OTS: At a Glance Organization Group

- OTS: At a Glance Person Group

- OTS: At a Glance Relationship Group

*Customer Profile Engine* is a concurrent program that is part of the TeleService dashboard setup. Refer to the *Oracle TeleService Implementation Guide* for more details on setting up this concurrent request.

## Set up Window Title

This step is optional.

By default, the window title shows the party name followed by the primary phone number, city and country name. Your administrators can create a custom query for a dashboard profile variable with code to set the window title according to their needs. The only bind variable enabled is party_id and it should be part of the query as ':party_id'. The total length of the window title (including the party name which is displayed always before any customization) must not exceed 250 characters

As part of the dashboard setup create a profile variable with the following variable code:

AST_AT_A_GLANCE_WINDOW_TITLE

## Set the Title for the Business Objects

This step is optional. You can change the titles for each business object that appears in the window by changing the meaning for the following lookup codes for lookup type **OTS: At a Glance Business Objects:**

| Lookup Code | Current Meaning |
| --- | --- |
| AST_INTERESTS_MV | Product Interests |
| AST_OPPORTUNITIES_MV | Opportunities |
| AST_QUOTES_MV | Quotes |
| AST_LEADS_MV | Sales Leads |
| AST_TASKS_MV | Tasks |

## Customize the Action Drop Down Menu

This step is optional. You can change the text for the Action drop down menu by changing the meaning for the following lookup codes for lookup type OTS: At a Glance Actions:

| Lookup Code | Current Meaning |
| --- | --- |
| AST_RC_ALL | Launch eBusiness Center |
| AST_EBC_SLD | Create Lead |
| AST_EBC_OPP | Create Opportunity |
| AST_EBC_TSK | Create Task |
| AST_EBC_QTO | Create Quote |
| AST_CU_ORD | Create Order |

| Lookup Code | Current Meaning |
| --- | --- |
| AST_EBC_SR | Create Service Request |
| AST_NT_TAB | Create Note |

## Setting Up Web Collaboration

If you want users to be able to join or start a meeting from the eBusiness Center, Opportunity Center, or Lead Center, then set up your web collaboration software. The Web Collaborate toolbar and menu item are enabled only when both of the following profiles are set up. The Start Page for the web collaboration is necessary to enable web collaboration.

- **OTS: Enable Web Collaboration:**The default setting is No. Set to Yes. The option "Web Collaborate" will appear on the user's Action menu.

- **OTS: URL for Web Collaborate Start Page:**The default setting is None. Enter the URL that becomes the start page when a user starts a new meeting. For example, `http://imeeting.oracle.com` or `http://www.webex.com/meeting.`

## Setting Up Opportunity Forecasting

Oracle TeleSales enables users to track an overall forecast total for an opportunity, as well as manage the amounts (Best, Forecast and Worst) at the product line level. Also, users can capture forecast amounts for each product line that enable agents to receive sales credits at the revenue level or at the non-revenue level, depending on their role in the sale.

Users can add or modify the forecast total amount for an opportunity at the opportunity header level. Also, they can modify the Best, Forecast and Worst amounts that are displayed at the product line level for an opportunity. The Best, Forecast, and Worst amounts are initially calculated based on profile option settings. However, when users enter the forecast amount at the opportunity header level and save the changes, the Best, Forecast, and Worst numbers are recalculated based on that amount. Also, users can manually override the amounts for Best, Forecast, and Worst.

**How Best, Forecast and Worst Values are Calculated**

By default , this calculation is controlled by the ASN: Forecast Defaulting Type profile option. Opportunity product line forecast default amounts are calculated using weighted pipeline or win probability range. By default, Oracle TeleSales uses weighted pipeline to determine forecast default amounts.

If the weighted pipeline is used to calculate forecast amounts, it is used as shown in the

table below:

**Weighted 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 table below:

**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 | Pipeline Amount | Pipeline Amount | Pipeline Amount |
| Not Won | | | |
| 80% < = Win Probability | | | |
| Forecastable | Pipeline Amount | Pipeline Amount | Pipeline Amount |
| Won | | | |
| Win Probability is not applicable in this case | | | |
| Not Forecastable | Blank and not editable | Blank and not editable | Blank and not editable |
| Win Probability is not applicable in this case | | | |

Note that any manual updates that users make to the Best, Forecast, and Worst amounts override the values that result from any defaulting that has been set through profile options.

1. To set up opportunity forecasting, set the following profile options:

    • ASN: Forecast Defaulting Type

    • ASN: Default Non-Revenue Credit Type

    • ASN: Default Forecast Category

    • ASN: Forecast Sales Credit Type

    See the *Oracle Sales Implementation Guide* for details on these profile options.

# Integrating with Oracle Order Management

The integration with Oracle Order Management provides the ability to create new orders, view an individual order, and view a list of orders for a customer in the eBusiness Center.

### Viewing and Creating Orders in an Order Form:

1. Set the following profile option to determine the form the orders appear in. The profile can be set at all levels.

    OM: Sales Orders Form Preference

    Set to one of the following:

- Sales Orders: the existing form

- Quick Sales Order: the new form

  Default: Sales Orders

2. Add the sales order form you selected in the profile option to the TeleSales Agent Menu or the TeleSales Manager Menu or both.

   - For the existing form (Sales Orders), select the User Function Name *Sales Orders: External Users* The Function Name is *ONT_OEX_OEORD_EXTERNAL*.

   - For the new quick entry form (Quick Sales Order), select the User Function Name *Quick Order Entry: External Users* The Function Name is *ONT_OEXOETEL_EXTERNAL*.

     You can add both forms to the menu. For example User A and User B have the same responsibility and therefore see the same menu, but User A's user level profile option is set for Sales Orders and User B's user level profile option is set for Quick Sales Order.

### Viewing Orders on the Order Tab of the eBusiness Center:

Set the following system profile options to view orders in the Order tab.

- OTS: Order History - Default value for the Filter

  Sets the Order tab default filter. Values are Order Status, Order Type, Order Source, or null.

- OTS: Order History - Number of months to Display Orders

  Determines the default from, to date range for the Order tab. It is the number of months before the current date.

### Setting the Default Primary Address for Sales Orders:

Set the OTS: Sales Order Default Address Source system profile option to set the default primary address for sales orders. Values are Oracle TeleSales or Order Management. The default is Oracle TeleSales.

# Integrating with Oracle Contracts Modules

A user can view the details for a contract from the Contract tab in the eBusiness Center only if the menu *Define Coverage Template* is added to the TeleSales Agent Menu.

# Setting Up Business Event Notification

Business events are used by Oracle TeleSales to notify users about changes to customer, opportunity, and lead information. These events are available for you to write a subscription function to raise a Work Flow notification for any of the customer and opportunity changes. When information changes in the system, users are notified using workflow in the Oracle Work Flow Business Event System.

The set up process for business events functionality in Oracle TeleSales requires the System Administrator to:

- Identify the business events

- Create a subscription function for the events

- Set up a subscription for notification of those events

- Check to confirm the concurrent program "Workflow Agent Listener" is running in concurrent mode. (see appendix for information on concurrent programs)

## How Business Events are Raised

In Oracle TeleSales, business events are triggered from the user interface for Opportunity and Customer Sales Team modules. No events are raised if the Opportunity or Sales Team API are invoked through means other than the TeleSales user interface. These events are not raised from the API because of multiple API calls and multiple updates within an API that cause multiple redundant events to be raised for a given user interface action.

A business event is raised when a user interface screen is submitted (for example, Opportunity Update) in four steps:

1. Before the start of the business logic for the UI screen, a data snapshot is put onto the AS_EVENT_DATA table after generating a new event key. This is done for all events that could be raised submitting the screen. For example, before Opportunity Update a Snapshot of AS_LEADS_ALL and AS_ACCESSES_ALL is taken for the LEAD_ID to be updated since either the Opportunity header or the Sales Team can change through online TAP upon Opportunity update. The OBJECT_STATE is marked as OLD.

   The above snapshot is taken only if there are enabled user subscriptions to the corresponding event.

2. For each data snapshot taken in the first step, a data snapshot is taken after the business logic is completed. Then, an asynchronous seeded event with phase 100 is raised with the corresponding key. Note that this is a seeded internal event and not for user subscription.

3. There is a seeded subscription function for each asynchronous internal event raised in the previous step. This function compares the old and new snapshots and raises the corresponding user event if the snapshots are different. Since this function is called asynchronously the synchronous user subscriptions corresponding to the user event raised are also asynchronously run with respect to the user interface.

   If there is no difference between the old and new snapshots then no user event is raised and the event data in AS_EVENT_DATA corresponding to the event key is deleted.

4. If a user event was raised in the previous step, after all the user subscribed functions finish execution, the seeded subscription to the user event AS_BUSINESS_EVENT_PVT. Event_data_delete at phase 99 is called which deletes the event data in AS_EVENT_DATA corresponding to the event key.

For the asynchronous event raised in step three to be processed, the concurrent program "Workflow Agent Listener" should be running on the WF_DEFERRED queue periodically (For example, the next request is scheduled one minute after the completion of the current one). If the concurrent program is not visible you might have to enable it or add it to your security group.

## Identifying Business Events

The event name (for example, oracle.apps.as.opportunity.update_salesteam) and the description are necessary for writing the subscription function and also for creating the subscription by the System Administrator.

The available business events are:

- Opportunity header is updated (oracle.apps.as.opportunity.update_header)

- Opportunity sales team is updated (oracle.apps.as.opportunity.update_salesteam)

- Opportunity status is updated to "closed" (oracle.apps.as.opportunity.update_closedStatus) This event is raised in addition to the header update event.

- Opportunity status is updated to "lost" (oracle.apps.as.opportunity.update_lostStatus) This event is raised in addition to the header update and Opportunity closed event.

- Customer sales team is updated (oracle.apps.as.customer.update_salesteam)

- Contact point phone number is added for customer (oracle.apps.ar.hz.ContactPoint.create)

- Contact point phone number is updated (oracle.apps.ar.hz.ContactPoint.update)

- Contact point email address is added for customer (oracle.apps.ar.hz.ContactPoint.create)

- Contact point email address is updated (oracle.apps.ar.hz.ContactPoint.update)

- Customer relationship is created (oracle.apps.ar.hz.Relationship.create)

- Customer relationship is updated (oracle.apps.ar.hz.Relationship.update)

- Organization is created (oracle.apps.ar.hz.Organization.create)

- Organization details are updated (oracle.apps.ar.hz.Organization.update)

- Person is created (oracle.apps.ar.hz.Person.create)

- Person details are updated (oracle.apps.ar.hz.Person.update)

- Address is created for customer (oracle.apps.ar.hz.Location.create)

- Address details are updated (oracle.apps.ar.hz.Location.update)

- Forecast submitted (oracle.apps.asf.forecast.submitted) Event raised when a forecast is submitted by a sales person. If subscribed to, immediate manager is notified.

- Forecast is resubmitted (oracle.apps.asf.forecast.changed) Event raised when a forecast is resubmitted. If subscribed to, immediate manager is notified with previous and current forecast numbers.

## Creating a Subscription Function

Writing subscription functions are an important step in setting up business events notification. This section gives the details required for writing a subscription function, including an example. The System Administrator needs only the name of the subscription function, however the details are required for an implementation of the subscription function for the required notification.

For further details refer to the *Oracle XML Gateway User's Guide* .

### Event Parameters

The following table shows the parameters that are passed to a subscribing function when an event is raised, in addition to the event name and event key. The information about the old event and new event data are captured in the table AS_EVENT_DATA.

| Event Name | Parameters | Description |
|---|---|---|
| oracle.apps.as.opportunity.update_header | LEAD_ID | Lead ID of opportunity |
| oracle.apps.as.opportunity.update_wonStatus | | |
| oracle.apps.as.opportunity.update_lostStatus | | |
| oracle.apps.as.opportunity.update_closedStatus | | |
| oracle.apps.as.opportunity.update_salesteam | | |
| | USER_ID | Logged in User ID |
| | RESP_ID | Resp ID |
| | RESP_APPL_ID | Application ID |
| | SECURITY_GROUP_ID | Security Group ID |
| | ORG_ID | Organization ID |
| oracle.apps.as.customer.update_salesteam | CUSTOMER_ID | Customer ID whose sales team has changed |
| | USER_ID | Logged in User ID |
| | RESP_ID | Resp ID |
| | RESP_APPL_ID | Application ID |
| | SECURITY_GROUP_ID | Security Group ID |
| | ORG_ID | Organization ID |

## AS_EVENT_DATA Table

The AS_EVENT_DATA table is a generic temporary table used to capture old and new event data for Opportunity and Customer Sales Team events.

When a business event is raised, the subscribing function receives the event name and

an event key which identifies the event. For Opportunity and Customer Sales Team events, the event data is captured in the AS_EVENT_DATA table with the event_key. The column labeled OBJECT_STATE identifies whether the data is old or new in the table.

For opportunity header update, close, and win/loss events, there are two entries for each event key, one entry for the old event and one entry for the new event data. For opportunity and customer sales team update events, there is one entry for each sales team member in the old and new sales team.

Fields in the old and new records are mapped to the generic Number, Date, and Character fields. This enables the subscribing function to query the AS_EVENT_DATA table using the event_key and object_state (OLD/NEW) columns to retrieve the old and new event data for the corresponding event.

The following table summarizes the important fields of the AS_EVENT_DATA table.

| Column Name | Data type | Length | Optional | Comment |
|---|---|---|---|---|
| EVENT_KEY | VARCHAR2 | 240 | NOT NULL | Unique identifier for the event raised. |
| OBJECT_STATE | VARCHAR2 | 3 | NOT NULL | Indicates if the parameter contains existing, new, or replacement values. OLD values currently exist. NEW values create initial values or replace existing values. |
| CHAR01 To CHAR80 | VARCHAR2 | 520 | NULL | Value of the parameter only if the data type is VARCHAR2. |
| NUM01 To NUM30 | NUMBER | | NULL | Value of the parameter only if the data type is NUM. |

| Column Name | Data type | Length | Optional | Comment |
|---|---|---|---|---|
| DATE01 To DATE15 | DATE | | NULL | Value of the parameter only if the data type is DATE. |

Subscription to sales business events should not delete the entries in the AS_EVENT_DATA table. Entries are deleted by a seeded subscription to the function AS_BUSINESS_EVENT_PVT.Event_data_delete.

## Event Data Mapping

The table below shows the event data mapping from the original table to the AS_EVENT_DATA table.

| Events | Record Columns | AS_EVENT_DATA columns |
|---|---|---|
| oracle.apps.as.opportunity.update_header<br><br>oracle.apps.as.opportunity.update_wonStatus<br><br>oracle.apps.as.opportunity.update_lostStatus<br><br>oracle.apps.as.opportunity.update_closedStatus | LEAD_ID | NUM01 |
| The mapping defined is from AS_LEADS_ALL to AS_EVENT_DATA | CUSTOMER_ID | NUM02 |
| | ADDRESS_ID | NUM03 |
| | OWNER_SALESFORCE_ID | NUM04 |
| | OWNER_SALES_GROUP_ID | NUM05 |
| | SALES_STAGE_ID | NUM06 |
| | WIN_PROBABILITY | NUM07 |

| Events | Record Columns | AS_EVENT_DATA columns |
|---|---|---|
| | CUSTOMER_BUDGET | NUM08 |
| | SALES_METHODOLOGY_ID | NUM09 |
| | TOTAL_AMOUNT | NUM10 |
| | LAST_UPDATED_BY | NUM11 |
| | CREATED_BY | NUM12 |
| | CLOSE_COMPETITOR_ID | NUM13 |
| | SOURCE_PROMOTION_ID | NUM14 |
| | END_USER_CUSTOMER_ID | NUM15 |
| | END_USER_ADDRESS_ID | NUM16 |
| | ORG_ID | NUM17 |
| | PRICE_LIST_ID | NUM18 |
| | INCUMBENT_PARTNER_RESOURCE_ID | NUM19 |
| | INCUMBENT_PARTNER_PARTY_ID | NUM20 |
| | OFFER_ID | NUM21 |
| | LAST_UPDATE_DATE | DATE01 |
| | CREATION_DATE | DATE02 |
| | DECISION_DATE | DATE03 |
| | LEAD_NUMBER | CHAR01 |
| | STATUS | CHAR02 |

| Events | Record Columns | AS_EVENT_DATA columns |
|---|---|---|
| | ORIG_SYSTEM_REFERENCE | CHAR03 |
| | CHANNEL_CODE | CHAR04 |
| | CURRENCY_CODE | CHAR05 |
| | CLOSE_REASON | CHAR06 |
| | CLOSE_COMPETITOR_COD E | CHAR07 |
| | CLOSE_COMPETITOR | CHAR08 |
| | CLOSE_COMMENT | CHAR9 |
| | DESCRIPTION | CHAR10 |
| | PARENT_PROJECT | CHAR11 |
| | AUTO_ASSIGNMENT_TYPE | CHAR12 |
| | PRM_ASSIGNMENT_TYPE | CHAR13 |
| | DECISION_TIMEFRAME_C ODE | CHAR14 |
| | ATTRIBUTE_CATEGORY | CHAR15 |
| | ATTRIBUTE1 | CHAR16 |
| | ATTRIBUTE2 | CHAR17 |
| | ATTRIBUTE3 | CHAR18 |
| | ATTRIBUTE4 | CHAR19 |
| | ATTRIBUTE5 | CHAR20 |
| | ATTRIBUTE6 | CHAR21 |

| Events | Record Columns | AS_EVENT_DATA columns |
|---|---|---|
| | ATTRIBUTE7 | CHAR22 |
| | ATTRIBUTE8 | CHAR23 |
| | ATTRIBUTE9 | CHAR24 |
| | ATTRIBUTE10 | CHAR25 |
| | ATTRIBUTE11 | CHAR26 |
| | ATTRIBUTE12 | CHAR27 |
| | ATTRIBUTE13 | CHAR28 |
| | ATTRIBUTE14 | CHAR29 |
| | ATTRIBUTE15 | CHAR30 |
| | VEHICLE_RESPONSE_CODE | CHAR31 |
| | BUDGET_STATUS_CODE | CHAR32 |
| | PRM_EXEC_SPONSOR_FLAG | CHAR33 |
| | PRM_PRJ_LEAD_IN_PLACE_FLAG | CHAR34 |
| | PRM_IND_CLASSIFICATION_CODE | CHAR35 |
| | PRM_LEAD_TYPE | CHAR36 |
| | FREEZE_FLAG | CHAR37 |
| oracle.apps.as.opportunity.update_salesteam | SALESFORCE_ID | NUM01 |

| Events | Record Columns | AS_EVENT_DATA columns |
|---|---|---|
| The mapping defined is from AS_ACCESSES_ALL to AS_EVENT_DATA | SALES_GROUP_ID | NUM02 |
| | ACCESS_ID | NUM03 |
| | LEAD_ID | NUM04 |
| oracle.apps.as.customer.update_salesteam | SALESFORCE_ID | NUM01 |
| The mapping defined is from AS_ACCESSES_ALL to AS_EVENT_DATA | SALES_GROUP_ID | NUM02 |
| | ACCESS_ID | NUM03 |
| | CUSTOMER_ID | NUM04 |

### Event Subscription Example

The following code example is for a subscription function which can be used for any of the Opportunity or Customer Sales Team events. It captures the event data and parameters to the same AS_EVENT_DATA table before deletion by the delete subscription. However, the copied event data has to be deleted manually. To subscribe to an event using this function enter <Package Name>.Data_capture for the Rule function.

```
-- This function is for subscribing, for testing/debugging of business
events,
-- to business events raised by Opportunity and customer sales team
modules
-- which log data to as_event_data table. It copies the event_data to
new rows
-- in the same as_event_data table so that the debug data can be seen
after it
-- is automatically deleted. It creates a new event_key like
'debug<sequence>',
-- The first rows contain the event parameters one by one. The parameter
name is
-- stored in CHAR01 and value in CHAR02. Two pseudo parameters
EVENT_NAME and
-- EVENT_KEY are added. The subsequent rows contain as_event_data
corresponding
-- to the event key received. It is the users responsibility to delete
these
-- debug rows from the as_event_data table.
FUNCTION Data_capture
 (p_subscription_guid  IN RAW,
  p_event              IN OUT NOCOPY WF_EVENT_T)
RETURN VARCHAR2
IS
 l_api_name     CONSTANT VARCHAR2(30) := 'Data_capture';
 l_index        NUMBER;
-- The Below methods are how you can get the event name and the event
key.
 l_event_name   VARCHAR2(240) := p_event.GetEventName();
 l_key          VARCHAR2(240) := p_event.GetEventKey();
 l_new_key      VARCHAR2(240);
 l_param        WF_PARAMETER_T;
-- Get the parameter list from which we can get the event parameters.
 l_parameters   WF_PARAMETER_LIST_T := p_event.GetParameterList();
 l_debug        BOOLEAN :=
FND_MSG_PUB.Check_Msg_Level(FND_MSG_PUB.G_MSG_LVL_DEBUG_LOW);
BEGIN
    SAVEPOINT Data_capture;


-- Debug Message
  IF l_debug THEN
     AS_UTILITY_PVT.Debug_Message(FND_MSG_PUB.G_MSG_LVL_DEBUG_LOW,
                 'Private API: ' || l_api_name || ' start');
     AS_UTILITY_PVT.Debug_Message(FND_MSG_PUB.G_MSG_LVL_DEBUG_LOW,
                 'Event Name = ' || l_event_name || ', key = ' ||
l_key);
    END IF;

    SELECT 'debug' || AS_BUSINESS_EVENT_S.nextval INTO l_new_key FROM
DUAL;
```

```
        -- Get the event parameters one by one and store them in the
AS_EVENT_DATA
            -- Table
        FOR l_index IN 1..l_parameters.last LOOP
            l_param := l_parameters(l_index);
            insert into AS_EVENT_DATA (
                EVENT_DATA_ID,
                EVENT_KEY, OBJECT_STATE, CHAR01, CHAR02,
                LAST_UPDATE_DATE, CREATION_DATE, CREATED_BY,
LAST_UPDATED_BY,
                LAST_UPDATE_LOGIN
            )
            values (
                AS_EVENT_DATA_S.nextval,
                SYSDATE, SYSDATE, FND_GLOBAL.USER_ID, FND_GLOBAL.USER_ID,
                l_new_key, 'AAA', l_param.GetName(), l_param.GetValue(),
                FND_GLOBAL.CONC_LOGIN_ID
            );
            IF l_debug THEN

AS_UTILITY_PVT.Debug_Message(FND_MSG_PUB.G_MSG_LVL_DEBUG_LOW,
                    l_param.GetName() || ' : ' || l_param.GetValue()) ;
            END IF;
        END LOOP;


    -- Store the Event Name
        insert into AS_EVENT_DATA (
            EVENT_DATA_ID,
            EVENT_KEY, OBJECT_STATE, CHAR01, CHAR02,
            LAST_UPDATE_DATE, CREATION_DATE, CREATED_BY, LAST_UPDATED_BY,
            LAST_UPDATE_LOGIN
        )
        values (
            AS_EVENT_DATA_S.nextval,
            l_new_key, 'AAA', 'EVENT_NAME', l_event_name,
            SYSDATE, SYSDATE, FND_GLOBAL.USER_ID, FND_GLOBAL.USER_ID,
            FND_GLOBAL.CONC_LOGIN_ID
        );


    -- Store the Event Key
        insert into AS_EVENT_DATA (
            EVENT_DATA_ID,
            EVENT_KEY, OBJECT_STATE, CHAR01, CHAR02,
            LAST_UPDATE_DATE, CREATION_DATE, CREATED_BY, LAST_UPDATED_BY,
            LAST_UPDATE_LOGIN
        )
        values (
            AS_EVENT_DATA_S.nextval,
            l_new_key, 'AAA', 'EVENT_KEY', l_key,
            SYSDATE, SYSDATE, FND_GLOBAL.USER_ID, FND_GLOBAL.USER_ID,
            FND_GLOBAL.CONC_LOGIN_ID
        );


    -- Copy the Event data to the new key before it is deleted
        Copy_Event_Data(l_key, l_new_key);
```

```
-- Debug Message
    IF l_debug THEN
        AS_UTILITY_PVT.Debug_Message(FND_MSG_PUB.G_MSG_LVL_DEBUG_LOW,
                               'Private API: ' || l_api_name || ' end');
    END IF;


RETURN 'SUCCESS';


EXCEPTION


WHEN NO_DATA_FOUND THEN
    FND_MESSAGE.Set_Name('AS', 'Error number ' || to_char(SQLCODE));
    FND_MSG_PUB.ADD;


WF_CORE.CONTEXT('AS_BUSINESS_EVENT_TEST_PVT', 'DATA_CAPTURE',
p_event.getEventName(), p_subscription_guid);
    WF_EVENT.setErrorInfo(p_event, 'WARNING');


RETURN 'WARNING';


WHEN OTHERS  THEN
    ROLLBACK TO Data_capture;


FND_MESSAGE.Set_Name('AS', 'Error number ' || to_char(SQLCODE));
    FND_MSG_PUB.ADD;


WF_CORE.CONTEXT('AS_BUSINESS_EVENT_TEST_PVT', 'DATA_CAPTURE',
p_event.getEventName(), p_subscription_guid);
    WF_EVENT.setErrorInfo(p_event, 'ERROR');


RETURN 'ERROR';
END Data_capture;
```

```
            -- Copies the event data to a new key
            PROCEDURE Copy_Event_Data(
                p_old_event_key IN VARCHAR2,
                p_new_event_key IN VARCHAR2
            ) IS
            BEGIN
                insert into AS_EVENT_DATA (
                    EVENT_DATA_ID,
                    EVENT_KEY, OBJECT_STATE,
                    LAST_UPDATE_DATE, CREATION_DATE, CREATED_BY, LAST_UPDATED_BY,
                    LAST_UPDATE_LOGIN,
                    CHAR01, CHAR02, CHAR03, CHAR04, CHAR05, CHAR06, CHAR07, CHAR08,
                    CHAR09, CHAR10, CHAR11, CHAR12, CHAR13, CHAR14, CHAR15, CHAR16,
                    CHAR17, CHAR18, CHAR19, CHAR20, CHAR21, CHAR22, CHAR23, CHAR24,
                    CHAR25, CHAR26, CHAR27, CHAR28, CHAR29, CHAR30, CHAR31, CHAR32,
                    CHAR33, CHAR34, CHAR35, CHAR36, CHAR37, CHAR38, CHAR39, CHAR40,
                    CHAR41, CHAR42, CHAR43, CHAR44, CHAR45, CHAR46, CHAR47, CHAR48,
                    CHAR49, CHAR50, CHAR51, CHAR52, CHAR53, CHAR54, CHAR55, CHAR56,
                    CHAR57, CHAR58, CHAR59, CHAR60, CHAR61, CHAR62, CHAR63, CHAR64,
                    CHAR65, CHAR66, CHAR67, CHAR68, CHAR69, CHAR70, CHAR71, CHAR72,
                    CHAR73, CHAR74, CHAR75, CHAR76, CHAR77, CHAR78, CHAR79, CHAR80,
                    NUM01, NUM02, NUM03, NUM04, NUM05, NUM06, NUM07, NUM08, NUM09,
                    NUM10, NUM11, NUM12, NUM13, NUM14, NUM15, NUM16, NUM17, NUM18,
                    NUM19, NUM20, NUM21, NUM22, NUM23, NUM24, NUM25, NUM26, NUM27,
                    NUM28, NUM29, NUM30,
                    DATE01, DATE02, DATE03, DATE04, DATE05, DATE06, DATE07, DATE08,
                    DATE09, DATE10, DATE11, DATE12, DATE13, DATE14, DATE15
                )
                select
                    AS_EVENT_DATA_S.nextval,
                    p_new_event_key, OBJECT_STATE,
                    SYSDATE, SYSDATE, CREATED_BY, LAST_UPDATED_BY,
                    LAST_UPDATE_LOGIN,
                    CHAR01, CHAR02, CHAR03, CHAR04, CHAR05, CHAR06, CHAR07, CHAR08,
                    CHAR09, CHAR10, CHAR11, CHAR12, CHAR13, CHAR14, CHAR15, CHAR16,
                    CHAR17, CHAR18, CHAR19, CHAR20, CHAR21, CHAR22, CHAR23, CHAR24,
                    CHAR25, CHAR26, CHAR27, CHAR28, CHAR29, CHAR30, CHAR31, CHAR32,
                    CHAR33, CHAR34, CHAR35, CHAR36, CHAR37, CHAR38, CHAR39, CHAR40,
                    CHAR41, CHAR42, CHAR43, CHAR44, CHAR45, CHAR46, CHAR47, CHAR48,
                    CHAR49, CHAR50, CHAR51, CHAR52, CHAR53, CHAR54, CHAR55, CHAR56,
                    CHAR57, CHAR58, CHAR59, CHAR60, CHAR61, CHAR62, CHAR63, CHAR64,
                    CHAR65, CHAR66, CHAR67, CHAR68, CHAR69, CHAR70, CHAR71, CHAR72,
                    CHAR73, CHAR74, CHAR75, CHAR76, CHAR77, CHAR78, CHAR79, CHAR80,
                    NUM01, NUM02, NUM03, NUM04, NUM05, NUM06, NUM07, NUM08, NUM09,
                    NUM10, NUM11, NUM12, NUM13, NUM14, NUM15, NUM16, NUM17, NUM18,
                    NUM19, NUM20, NUM21, NUM22, NUM23, NUM24, NUM25, NUM26, NUM27,
                    NUM28, NUM29, NUM30,
                    DATE01, DATE02, DATE03, DATE04, DATE05, DATE06, DATE07, DATE08,
                    DATE09, DATE10, DATE11, DATE12, DATE13, DATE14, DATE15
                from AS_EVENT_DATA where event_key = p_old_event_key;
            END Copy_Event_Data;
```

## Subscribing to an Event

A System Administrator subscribes to events for those who want notification of specific
business events as previously identified.

**Steps**

1.  Navigate to the Oracle Forms application.

2.  Select Work Flow Administrator Web Applications Responsibility.

3.  Click **Add Event Subscriptions**.

4.  Click **Add Subscriptions**.

5.  Enter the following fields:

    -   System: your local system, host machine, or database instance

    -   Source Type: Local

    -   Event Filter: the event name for which you want to create a subscription

    -   Phase: 1-98

    -   Status: Enabled

    -   Rule Data: Key

    -   Rule Function: Subscription function which receives information about the event. Refer to "Oracle Workflow Business Event System and Oracle XML Gateway Part II" and to (section).

6.  Click Submit.

## Summary of Seeded (Internal) Events and Subscriptions

The following table summarizes the internal seeded events and subscriptions.

| User Event | Seeded Event for Raising the User Event (not for user subscription) | Seeded Subscription | Phase |
|---|---|---|---|
| oracle.apps.as.opportunity.update_header<br><br>oracle.apps.as.opportunity.update_wonStatus<br><br>oracle.apps.as.opportunity.update_lostStatus<br><br>oracle.apps.as.opportunity.update_closedStatus | oracle.apps.as.opportunity.int_update_header | AS_BUSINESS_EVENT_PVT.Raise_update_oppty_event | 100 |
| oracle.apps.as.opportunity.update_salesteam<br><br>oracle.apps.as.customer.update_salesteam | oracle.apps.as.opportunity.int_update_salesteam | AS_BUSINESS_EVENT_PVT.Raise_upd_STeam_evnt | 100 |
| All user events above | N/A | AS_BUSINESS_EVENT_PVT.Event_data_delete | 99 |

# Using Diagnostics

This topic covers the diagnostic scripts that can be used by System Administrators to detect set up issues:

**Responsibility**

System Administrator

**Navigation**

Administration Console > Diagnostics > Advanced > Select TeleSales

## Related Topics

To get a report listing all the patches that have been applied to your application, refer to the "*Reports > Patch Search*" section of the *Oracle Applications Maintenance Utilities* documentation.

## Overview of TeleSales Diagnostics

For Oracle TeleSales there are seven groups of diagnostic tests. These diagnostic scripts

alert a System Administrator about issues that might have occurred during set up or implementation.

- General, page 4-153

- Customer, page 4-153

- Opportunity, page 4-154

- Scripting, page 4-157

- At-A-Glance, page 4-157

- Interaction Center, page 4-158

## General

For the following scripts, click Run Test, then click View Report.

**Profile Overview**

For TeleSales, the script checks all TeleSales and Sales profiles and values.

**Profile Query**

This query searches for a profile setting by profile name. You can search for profiles for any application.

**Concurrent Programs**

This script displays the date and time that all concurrent programs for TeleSales and Sales were run and whether the programs completed successfully.

## Customer

**Security Overview**

For TeleSales, enter the user name and responsibility to find the security overview of the user. Based on the input information the following items are checked:

- For TeleSales, the profiles OTS: Default User Role and OTS: Default User Sales Group are checked.

- Start and end date for all sales roles associated with the user.

- Start and end date for all sales groups associated with the user.

- Resource category, resource name, start date active, and end date active for the resource linked to the user id.

- All profile values associated with a given user and applicable to customer module

security.

Checks the following security profiles:

- Bypass Group Validation

- OS: Always Add Creator to Customer Sales Team

- OS: Create Contact Relationship Privilege

- OS: Create Person Privilege

- OS: Create Organization Privilege

- OS: Customer Access Privilege

- OS: Enable Customer LOV Security

- OS: Enable Real Time Customer Assignment

- OS: Manager Update Access

- OS: Default Value for Sales Team Keep Flag

- OS: Sales Admin Update Access

- OS: View Competitor Party Detail

- OS: View Partner Party Detail

**Check Security**

This script provides information about whether a user has view and update privileges for a particular customer.

# Opportunity

**Profile Options**

Checks the settings for the following profiles:

- OS: Address Required for Opportunity

- OS: Auto-relate Opportunity Note to Customer

- OS: Auto-relate Opportunity Note to Primary Contact

- OS: Compensation Sales Credit Type

- OS: Create Tasks Flag

- OS: Default Close Date Days

- OS: Default Opportunity Sales Stage

- OS: Default Opportunity Status

- OS: Default Opportunity Win Probability

- OS: Default Opportunity Sales Channel

- OS: Default Vehicle Response Code for Opportunity

- OS: Defaulting Primary Customer Address to Opportunity

- OS: Enable Real Time Opportunity Assignment

- OS: Enable Tracking Opportunity History Data

- OS: Enable Tracking Purchase Line History Data

- OS: Enable Tracking Sales Credits History Data

- OS: Forecast Sales Credit Type

- OS: Generate Opportunity System Notes

- OS: Inventory Category Integration

- OS: Linking Opportunity to Lead

- OS: Maximum Number of Days Allowed to Close an Opportunity

- OS: Opportunity Access Privilege

- OS: Opportunity Sales Team Default Role Type

- OS: Opportunity Probability Link

- OS: Opportunity Sales Credit Enforced Sales Team Definition

- OS: Privilege to Change Opportunity Owner

- OS: Regenerate Methodology Tasks

- OS: Sales Methodology

- OS: Default Value for Sales Team Keep Flag

- OS: Source Code Required for Opportunity

- OS: Time Frame for Opportunity Logs

- OTS: Default Tab in Opportunity Center

- OTS: Interactions-Generate Opportunity Activity

- OTS: Opportunity History Expanded Display

- OTS: UWQ-Display Source Code and Name for Opportunity Nodes

- OTS: Use Primary Address to Create Opportunity in UWQ

**Create**

This script checks to see that the user can create an opportunity successfully and if the user is assigned correctly to the sales team based on the profile setting. The script also reports the default values of the profile setting obtained or derived as part of script execution.

**Lead to Opportunity**

This script checks to confirm that a lead can be converted to an opportunity successfully.

**Security Overview**

For TeleSales, enter the user name and responsibility to find the security overview of the user. Based on the input information the following items are checked:

- For TeleSales, the profiles OTS: Default User Role and OTS: Default User Sales Group are checked.

- Start and end date for all sales *roles* associated with the user.

- Start and end date for all sales *groups* associated with the user.

- All profile values associated with a given user and applicable to opportunity module security.

Checks the following security profiles:
- OS: Enable Customer LOV Security

- OS: Enable Real Time Opportunity Assignment

- OS: Manager Update Access

- OS: Opportunity Access Privilege

- OS: Opportunity Sales Credit Enforce Sales Team Definition

- OS: Opportunity Sales Team Default Role Type

- OS: Privilege to Change Opportunity Owner

- OS: Sales Admin Update Access

- OS: Default Value for Sales Team Keep Flag

- OS: View Competitor Party Detail

- OS: View Partner Party Detail

**Check Security**

This script provides information about whether a user has view and update privileges for a particular opportunity.

## Scripting

This script lists all set up profiles related to Scripting.

**Profiles**

All profiles related to the scripting module are displayed:

- OTS: Scripting Installation

- OTS: Scripting-Apply Security for Suspended Scripts

- OTS: Scripting-Default Script

- OTS: Script Language

- OTS: Script Launch on UWQ Delivery

- OTS: Script Launch on Interaction

## At-A-Glance

**Setup**

This script includes a check for concurrent program for Materialized View Refresh, Dashboard Setup, and Security policy on tables.

- Checks the time, parameters, and success of the concurrent program for the Materialized View.

- Displays all profiles:

- • OTS: At a Glance - Number of Months of Data to Show

- • OTS: At a Glance Display Menu

- • OTS: At a Glance Dashboard HGrid Expanded Display

- • OTS: At a Glance - Execute User Callouts For Data Refresh

- • OTS: At a Glance - Enable Dashboard Data Refresh at Form Startup

- • Checks to make sure the Dashboard is set up correctly. If errors exist, they are displayed in the report output.

- • Lists all the materialized views related to At-A-Glance with their refresh time.

- • Checks for any security policy that exists on the base table on which a refresh script is based.

## Interaction Center

**UWQ, CTI and Interaction**

This script lists all profiles related to Interaction Center, CTI, Universal Work Queue.

All profiles and their values are displayed:

- • OTS: UWQ - Auto Launch Lead and Oppty Center

- • OTS: Interactions-Default Action

- • OTS: Interactions-Default Action Item

- • OTS: Interactions-Default Outcome

- • OTS: Interactions-Enable Automatic Start

- • OTS: Interactions-Enable Auto Wrapup

- • OTS: Interactions-Generate Collateral Activity

- • OTS: Interactions-Generate Customer Activity

- • OTS: Interactions-Generate Event Activity

- • OTS: Interactions-Generate Lead Activity

- • OTS: Interactions-Generate Opportunity Activity

- OTS: Interactions-Generate Query Activity

- OTS: Interactions-Generate Service Request Activity

- OTS: Interactions-Prompt for Wrapup

# A

# System Profile Options

This appendix covers the following topics:

- Setting System Profile Options
- Table of System Profile Options

## Setting System Profile Options

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*.

Use this procedure to set or change profile options.

**Responsibility**

Sales Administrator

**Navigation**

Oracle Sales Setup > System Profiles

## Table of System Profile Options

The following table lists by name and in alphabetical order the system profiles used by the applications. The table includes the following columns from left to right:

- **Profile Name**: Name of the profile option.

- **Category**: Lists the category of the profile option.

- **Description**: Explains what the profile option does.

- **Level**: Level at which this profile option can be set. A = Application, S = Site, R = Responsibility, U = User.

• **Default**: Lists the seeded default for the profile, if any.

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| AMS: Default Collateral Order Type | Collateral UI | Defaults the order type that was set up in Order Management or collateral fulfillment. | SARU | N/A |
| ASN: Default Non-Revenue Credit Type | Opportunities, Sales Forecast | Determines the default credit type used in the non-revenue table for non-revenue forecasting.<br><br>The default values for this profile can be set by the user through the Sales Default Preferences. | SARU | Values are based on Sales Credit types defined in Order Management. |
| ASN: Forecast Defaulting Type | Opportunities, Sales Forecast | Determines the defaulting logic for forecast values in the opportunity. Valid values are Pipeline and Win Probability.<br><br>See Setting Up Forecast Defaults, page 4-43 for more details. | S | Pipeline |
| Bypass Group Validation | Security | Setting this profile enables the user to navigate to the Lead and Opportunity pages. However, for a sales user this profile should always be set to No because create/update process on lead/opportunity always requires sales force information. | AR | N/A |
| Client Timezone | Tasks UI | Sets the default time zone for tasks. | SU | N/A |
| Customer Care: Start Menu in Quick Menu | Application Integration | Set the value to TeleSales Quick Menu to enable the Quick Menu for TeleSales. All applications using Quick Menu share this profile option. | SARU | N/A |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| Customer Care: Telephony Screen Pop Mode | Application Integration | Provides options to toggle between a telephony solution that uses UWQ and one that uses direct integration. | SARU | UWQ |
| Default Status | Tasks UI | Determines the default status for new tasks. | SARU | New |
| FND: Message Level Threshold | Debug | Sets message level threshold. | SARU | N/A |
| HZ: Change Party Name | TCA Settings | Determines if the customer name and Tax ID can be updated. | SRU | No |
| HZ: Display Certification Level | TCA Settings | Determines whether the Certification Level displays for a Partner or Preferred Partner, and for the Customer Name (Organization) LOV. If set to Yes, displays the column in the results of the search using the Partner or Preferred Partner LOV, as well as the Customer LOV. | S | No |
| HZ: Duplicate Allowed | TCA Settings | Determine whether duplicate entry into the Registry is allowed or not. If you set the profile option to Yes, records with duplicates that exceed the override threshold as defined in the match rule can still be saved. The No default prevents such records from being saved. | SARU | No |
| HZ: Enable Duplicate Prevention at Party Creation | TCA Settings | If set to Yes, enables the duplicate prevention match rules to identify possible duplicate objects being created. | SAR | Disabled |
| HZ: Enable DQM Party Search | Search | Determines whether DQM is enabled for organization and person searches. Set this profile to Yes only if you provide a match rule for other TCA profiles. Enables Customer Smart Search for Oracle TeleSales. | SAR | No |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| HZ: Generate Party Number | TCA Settings | If not set to Yes, you cannot manually create party numbers. You will receive the following error, "X Error Column Party Number must have a value". | SARU | N/A |
| HZ: Generate Party Site Number | TCA Settings | Specify whether or not TCA automatically generates a party site number when the relevant API is used or called from a user interface to create a party of type Organization or Person. If the profile option is set to Yes or left blank, then users cannot enter the party site number when creating the party. If set to No, users must enter the number. | SARU | N/A |
| HZ: Match Rule for Organization Advanced Search | Search | Specify the seeded or user-defined match rule for determining the search criteria and results for the organization advanced search. The profile option defaults to the seeded match rule HZ_ORG_ADV_SEARCH_RULE. | SAR | HZ_ORG_ADV_SEARCH_RULE |
| HZ: Match Rule for Organization Duplicate Prevention | Customer Settings | Specify the seeded or user-defined match rule for identifying potential duplicates of the organization that the user is creating. Use match rules with the Search type. The profile option defaults to the seeded match rule SAMPLE: SEARCH. | SAR | SAMPLE: SEARCH |
| HZ: Match Rule for Organization Simple Search | Search | Specify the seeded or user-defined match rule for determining the search criteria and results for the organization simple search. The profile option defaults to the seeded match rule HZ_ORG_SIMPLE_SEARCH_RULE. | SAR | HZ_ORG_SIMPLE_SEARCH_RULE |
| HZ: Match Rule for Person Advanced Search | Search | and results for the person advanced search. Do not use a match rule that has the Organization Name attribute. The profile option defaults to the seeded match rule HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE. | SAR | HZ_PERSON_ADVANCED_SEARCH_MATCH_RULE |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| HZ: Match Rule for Person Duplicate Prevention | Customer Settings | Specify the seeded or user-defined match rule for identifying potential duplicates of the person that the user is creating. Use match rules with the Search type. The profile option defaults to the seeded match rule SAMPLE: SEARCH. | SAR | SAMPLE: SEARCH |
| HZ: Match Rule for Person Simple Search | Search | Specify the seeded or user-defined match rule for determining the search criteria and results for the person simple search. Do not use a match rule that has the Organization Name attribute. The profile option defaults to the seeded match rule HZ_PERSON_SIMPLE_SEARCH_RULE. | SAR | HZ_PERSON_SIMPLE_SEARCH_RULE |
| HZ: Raise API Events | TCA Settings | This profile option controls Granular (V2) and Business Object business events from Trading Community Architecture Public APIs. The values are:<br><br>• All Events Enabled<br><br>• All Events Disabled<br><br>• Only Business Object Events Enabled<br><br>• Only Granular (V2) Events Enabled | SARU | Only Granular (V2) Events Enabled |
| IEU: Desktop: UI: Show Work Panel | Miscellaneous UWQ Settings | The work panel consists of an action panel where the user can take action on selected records and an information panel where notes are displayed for a selected record. If set to Yes, then the work panel appears for lead, opportunity, and marketing list nodes. If set to No, then the work panel does not appear. | SARU | No |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| IEU: Desktop: UI: Work-Selector Display Style | Miscellaneous UWQ Settings | This option determines how your work nodes are displayed. Hgrid: displays nodes in the left panel in an Hgrid view. Cascade: displays nodes in a cascading menu on top of the page. | SARU | Hgrid |
| IEU: Non-Media: Navigate | Miscellaneous UWQ Settings | Set to Yes to tell UWQ to reuse the same application window when you select a new work item. Set to No if you want UWQ to open a new additional window when you select a new work item. Set to Yes to save your computer resources. Can be set at the site, application, responsibility, and user levels. | SARU | No |
| IEU: Queue: Leads | Enable UWQ Objects | Set to Yes to allow the user to work on leads that belong to him as the owner. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No. | SARU | Null |
| IEU: Queue: Marketing Lists | Enable UWQ Objects | Set to Yes to allow the user to work on non-media marketing lists within his sales territory. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No. | SARU | Null |
| IEU: Queue: My Team Leads | Enable UWQ Objects | Set to Yes to allow the user to work on leads that belong to his sales team. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No. | SARU | Null |
| IEU: Queue: My Team Opportunities | Enable UWQ Objects | Set to Yes to allow the user to work on opportunities that belong to his sales team. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No. | SARU | Null |
| IEU: Queue: Opportunities | Enable UWQ Objects | Set to Yes to allow the user to work on opportunities that belong to him as the owner. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No. | SARU | Null |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| IEU: Queue: Personal List: Contacts | Enable UWQ Objects | Set to Yes to allow the user to work on personal contact lists created and saved through Universal Search. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No. | SARU | Yes |
| IEU: Queue: Personal List: Opportunities | Enable UWQ Objects | Set to Yes to allow the user to work on personal opportunity lists created and saved through Universal Search. Set to No to make the node unavailable in UWQ. If it is not set, it functions as No. | SARU | Yes |
| IEU: Queue: Quotes | Enable UWQ Objects | Set to Yes to make this category available. | SARU | Null |
| IEU: Queue Order: Leads | UWQ Sort Order | Enter a number that designates the order of appearance for owned leads in the work queue (in relation to the other Queue Order profiles.) | SARU | Null |
| IEU: Queue Order: Marketing Lists | UWQ Sort Order | Enter a number that designates the order of appearance for marketing lists in the work queue (in relation to the other Queue Order profiles.) | SARU | Null |
| IEU: Queue Order: My Team Leads | UWQ Sort Order | Enter a number that designates the order of appearance for my team leads in the work queue (in relation to the other Queue Order profiles.) | SARU | Null |
| IEU: Queue Order: My Team Opportunities | UWQ Sort Order | Enter a number that designates the order of appearance for my team opportunities in the work queue (in relation to the other Queue Order profiles.) | SARU | Null |
| IEU: Queue Order: Opportunities | UWQ Sort Order | Enter a number that designates the order of appearance for owned opportunities in the work queue (in relation to the other Queue Order profiles.) | SARU | Null |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| IEU: Queue Order: Personal List: Contacts | UWQ Sort Order | Enter a number that designates the order of appearance for personal contact lists in the work queue (in relation to the other Queue Order profiles.) | SARU | Null |
| IEU: Queue Order: Personal List: Opportunities | UWQ Sort Order | Enter a number that designates the order of appearance for personal opportunity lists in the work queue (in relation to the other Queue Order profiles.) | SARU | Null |
| IEU: Queue Order: Quotes | UWQ Sort Order | Determines the order of appearance for the queue. | SARU | Null |
| MO: Default Operating Unit | Miscellaneous Functional | Determines the default operating unit. See the *Oracle Applications Multiple Organizations Implementation Guide* 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. | ARU | N/A |
| MO: Operating Unit | Miscellaneous Functional | Determines the operating unit users 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 *Oracle Applications Multiple Organizations Implementation Guide* for details. | SARU | N/A |
| MO: Security Profile | Miscellaneous Functional | Determines the list of operating units that the user can access. See the *Oracle Applications Multiple Organizations Implementation Guide* for details. | SARU | N/A |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| Notes: Default Note Status | Miscellaneous UI | Sets the status for notes. | SARU | Public |
| OS: Activate Sales Interoperability | Compatibility | Facilitates interoperability between Oracle TeleSales and Oracle Sales. | S | Yes |
| OS: Address Required for Opportunity | Miscellaneous Opportunity Settings | Determines the address required for an opportunity. | S | No |
| OS: Address Required for Organization | Customer Settings | Sets the address required for an Organization. | S | No |
| OS: Address Required for Person | Customer Settings | Sets the address required for a Person. | S | No |
| OS: Address Required for Sales Lead | Leads | Sets the address required for a Sales Lead. | S | No |
| OS: Allow Updating Frozen Opportunities | Miscellaneous Opportunity Settings | Enables the update of frozen opportunities. | SARU | Yes |
| OS: Always Add Creator to Customer Sales Team | Customer Settings | If set to Yes, then the user who creates the customer is always added to the customer sales team. | SU | No |
| OS: Auto Convert Lead to Opportunity | Miscellaneous Opportunity Settings | Enables the automatic conversion of leads to opportunities. | S | Yes |
| OS: Auto-relate Lead note to Customer | Notes | Determine relating of lead note to customer. | SARU | Yes |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OS: Auto-relate Lead note to Primary Contact | Opportunity Notes | Determine relating of lead note to primary contact. | SARU | No |
| OS: Auto-relate Opportunity Note to Customer | Opportunity Notes | Relate a newly created opportunity note to a customer. | SARU | Yes |
| OS: Auto-relate Opportunity Note to Primary Contact | Opportunity Notes | Relate a newly created opportunity note to its primary contact automatically. | SARU | No |
| OS: Auto-relate Relationship note to Object | Notes | Relate a newly created relationship note to its object automatically. | SARU | Yes |
| OS: Auto-relate Relationship note to Subject | Notes | Relate a newly created relationship note to its subject automatically. | SARU | Yes |
| OS: Create Contact Relationship Privilege | Security | If set to Yes, the user, site, or responsibility can create a contact. If set to No, the user, site, or responsibility cannot create a contact. | SRU | Yes at site level |
| OS: Create Organization Privilege | Security | If set to Yes, the user, site, or responsibility can create an organization. If set to No, the user, site, or responsibility cannot create an organization. | SRU | Yes at site level |
| OS: Create Person Privilege | Security | If set to Yes, the user, site, or responsibility can create a person. If set to No, the user, site, or responsibility cannot create a person. | SRU | Yes at site level |
| OS: Create Tasks Flag | Tasks | Flag to indicate if tasks need to be created automatically. | SA | Yes |

| Profile Name | Category | Description | Level | Default |
| --- | --- | --- | --- | --- |
| OS: Customer Access Privilege | Security | Determines customer access.<br><br>**Full:** The user can view and update all customers. Generally, this access is given to super users only.<br><br>**Prospecting:** Users can view all customers but can update customer information only if they are on the sales team.<br><br>**Sales Team:** Users can view and modify customer information when they are on the sales team. | SARU | Full |
| OS: Daily Conversion Type | Sales Generic | Currency conversion type used as the daily rate for currency conversions in the opportunity pipeline. The List of Values in this profile option come from GL: Daily Conversion Types. | S | Corporate |
| OS: Date Mapping Type | Sales Generic | Sets the date mapping type. | S | Start Date of a Period |
| OS: Default Address Style | Customer UI | Sets the default address style. | SA | United States Address Style |
| OS: Default Close Date Days | Miscellaneous Opportunity Settings | Sets the default close date for an opportunity. | SARU | 150 |
| OS: Default Opportunity Sales Stage | Opportunity UI | Determines the default sales stage for a new opportunity. | SARU | Stage 1 |
| OS: Default Opportunity Status | Opportunity UI | Determines the default status for a new opportunity. | SARU | Preliminary |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OS: Default Opportunity Win Probability | Opportunity UI | Determines the default win probability for a new opportunity. | SARU | 10-Prospecting (Qualified) |
| OS: Default Period Type for Currency Conversion | Opportunity UI, Leads UI, Forecast UI | Determines the default period type for currency conversion. | S | Quarter |
| OS: Default Primary Organization Address for New Relationships | Customer Settings | When this profile is set to "Yes", the primary address of the organization automatically defaults as the relationship primary address when a new relationship is created. | SA | No |
| OS: Default Sales Channel | Opportunity UI | Default sales channel for new opportunities | SARU | Direct |
| OS: Default Value for Sales Team Keep Flag | Opportunity Sales Team | Sets the default keep flag for sales team creator. | S | Yes |
| OS: Default Vehicle Response Code for Opportunity | Opportunity UI | Determines the default Vehicle Response Code for an opportunity. | SARU | User |
| OS: Default Win/Loss Status | Opportunity UI | Determines the default win or loss status for an opportunity. | SARU | None |
| OS: Defaulting Primary Address of Customer for Lead | Leads | Determines the primary address of customer for lead. | SARU | No |
| OS: Defaulting Primary Customer Address to Opportunity | Miscellaneous Opportunity Settings | Enables defaulting of primary customer address to opportunity. | S | No |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OS: Degree of Parallelism | Deployment | Determines the degree of parallelism for concurrent program. | S | 4 |
| OS: Enable Customer LOV Security | Security | Setting this profile to 'Yes' restricts users to creating opportunities and leads only for those customers which they can view.<br><br>Setting this profile to 'No' allows all users to create opportunities and sales leads for any customers. The users can update the opportunities and sales leads they have created. | SA | No |
| OS: Enable Real Time Customer Assignment | Assignment | Enables assignment of customers in real time, whenever an agent updates a record. This is required for online territory assignment. | S | No |
| OS: Enable Real Time Denormalization for Customer Classification | Customer Settings | If set to Yes, enables real time denormalization of data entered or updated into the as_hz_class_code_denorm table. | S | Yes |
| OS: Enable Real Time Lead Assignment | Assignment | Enables assignment of leads in real time, whenever an agent updates a record. This is required for online territory assignment. | S | Yes |
| OS: Enable Real Time Opportunity Assignment | Assignment | Enables assignment of opportunities in real time, whenever an agent updates a record. This is required for online territory assignment. | S | No |
| OS: Enable Tracking Opportunity History Data | Opportunity Data Tracking | Set at the site level. If set to Yes, enables the history tracking of updates made to opportunity header information. If set to No (the default), will not track header updates for opportunity. | S | No |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OS: Enable Tracking Purchase Line History Data | Opportunity Data Tracking | Set to Yes to record when the line information or an opportunity is updated. Information does not yet display in Opportunity History. | S | No |
| OS: Enable Tracking Sales Credits History Data | Opportunity Data Tracking | Set to Yes to record when the sales credit information or an opportunity is updated. Information does not yet display in Opportunity History. | S | No |
| OS: Forecast Calendar | Miscellaneous Opportunity Settings | Sets the name of the calendar you are using to manage your forecasts. | S | N/A |
| OS: Forecast Sales Credit Type | Miscellaneous Opportunity Settings | Determines the forecast credit type for opportunity sales credits. | SARU | N/A |
| OS: Generate Opportunity System Notes | Opportunity Notes | Determines whether or not notes are automatically generated whenever the opportunity is modified. | S | Yes |
| OS: Hash Area Size for TAP | Assignment | If the value is set, TAP sets the value of the database parameter hash_area_size with this value. Consult your DBA to set this value. Note: The value should be an integer value. The value set here is limited to the TAP program (the database setting for the rest of the application is not changed by this setting). | S | N/A |
| OS: Lead New State Transition | Leads | Set to yes to prevent changing the status of a lead after it is converted to an opportunity. | S | Yes |
| OS: Lead to Opportunity Move Sales Team | Miscellaneous Opportunity Settings | Enables the lead to opportunity move of sales team. | S | No |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OS: Linking Opportunity to Lead | Miscellaneous Opportunity Settings | There are three settings for this profile:<br><br>Allow with prompt-If selected, allows the user to create a link to a lead either through the "Create Opportunity" function or through the Leads link on the Opportunity detail page.<br><br>Allowed-If selected, allows the user to create a link to a lead through the Leads link on the Opportunity detail page.<br><br>Not allowed-If selected, does not allow users to create links to leads. | SARU | Allowed with Prompt |
| OS: Manager Update Access | Security | This profile option sets the level of access for sales team members with the role of Manager to update information for their subordinates in the sales organization.<br><br>This system profile applies only to individuals granted the Sales Team access privilege in OS: Opportunity Access Privilege.<br><br>This profile has three possible settings<br><br>**Update data**: Update.<br><br>**Inherit data**: Inherit access privilege from subordinate.<br><br>**View data**: View data only. | SRU | View Data |
| OS: Match Rule for Contact Advanced Search | Search | Sets the match rule for contact advanced search. | SAR | N/A |
| OS: Match Rule for Contact Simple Search | Search | Sets the match rule for contact simple search. | SAR | N/A |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OS: Maximum Number of Days Allowed to Close an Opportunity | Miscellaneous Opportunity Settings | Sets the maximum number of days allowed to close an opportunity. | S | N/A |
| OS: Maximum Roll Days for Converting Amount | Sales Generic | Maximum roll days for converting currency amounts if no daily conversion rate exists. | S | N/A |
| OS: Move Opportunities | Sales Generic | Move Opportunities | S | Open |
| OS: Number of Child Account Workers for TAP | Assignment | Determines the maximum number of parallel workers (of Generate Access Records) spawned to process Account records. Maximum allowed is 10. | S | 2 |
| OS: Number of Child Opportunity Workers for TAP | Assignment | Determines the maximum number of parallel workers (of Generate Access Records) spawned to process Opportunity records. Maximum allowed is 10. | S | 2 |
| OS: Number of Child Lead Workers for TAP | Assignment | Determines the maximum number of parallel workers (of Generate Access Records) spawned to process Lead records. Maximum allowed is 10. | S | 2 |
| OS: Number of Child Proposal Workers for TAP | Assignment | 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 | Assignment | Determines the maximum number of parallel workers (of Generate Access Records) spawned to process quote records. Maximum allowed is 10. | S | 2 |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OS: Opportunity Access Privilege | Security | **Global Full:** Users can view and update all opportunities whether they are on the sales team or not. Generally, this access is given to super users only.<br><br>**Org Full** (Full by Organization)**:** Users can view and update all opportunities whether or not they are on the sales team. They can view and update all opportunities for all operating units to which they have access based on security profile settings.<br><br>**Prospecting:** Users can view all opportunities but they can make changes only when they are on the sales team. Users can create opportunities for a customer only when they are on that opportunity's sales team.<br><br>**Sales Team:** Users can view opportunities only when they are on the sales team. When the opportunity creator selects the Full Access checkbox on the Sales Team tab for a team member, that team member can update the opportunity. Otherwise the record is view only. | SRU | Global Full |
| OS: Opportunity Probability Link | Miscellaneous Opportunity Settings | Determines whether a warning or error is given if the win probability amount does not fall within the sales stages probabilities. | S | Warning |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OS: Opportunity Sales Credit Enforce Sales Team Definition | Opportunity Sales Team | Set to *Yes* to keep the person who added an opportunity line item on the sales team for that opportunity even if they are not on the team per territory definitions. If set to *No*, then when the Territory Assignment Program is run the salesperson is removed from the sales team if he doesn't fit the territory definition, even though he created the opportunity line item. Setting the *Keep* flag for the person for that opportunity prevents his removal from the sales team when this profile is set to No. | SARU | Yes |
| OS: Opportunity Sales Team Default Role Type | Opportunity UI | Determines the Opportunity Sales Team default role type. | SRU | N/A |
| OS: Perform Address Validation | Customer Settings | If the profile is set to "Yes", then the parameters set up in Oracle Accounts Receivables validates the addresses. | SA | Yes |
| OS: Preferred Reporting Currency | Opportunities | Preferred currency for denorm programs. | SARU | US Dollar |
| OS: Privilege to Change Lead Owner | Security | Determines privilege to change the lead owner. Users can change only the leads they own. | SRU | No |
| OS: Privilege to Change Opportunity Owner | Security, Opportunity Sales Team | Determines privilege to change the opportunity owner. | SARU | No |
| OS: Regenerate Methodology Tasks | Tasks | Regenerate tasks for sales methodologies that have the Create Tasks for All Stages flag set to No when the sales stage changes. | S | No |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OS: Relate Account to Tasks and Notes | Tasks | Set this profile to relate the account when present in the caller information section of the eBusiness Center added as a Reference or Related To for Tasks and Notes that are created. | SAR | No |
| OS: Sales Admin Update Access | Security | An employee with the Administrator role (as defined in the Resource Manager) can access the same records as the manager of the group they are assigned to. Groups are also set up in Resource Manager. The access can be of three types: **Update data**: The administrator can update the same data as the manager of the group. **Inherit data**: Administrators inherit the access privileges of the group manager. This means they can update the same customers and opportunities as the manager's subordinates. **View Data**: Administrators can only view the data created by the manager's subordinates. | SRU | View Data |
| OS: Sales Lead Access Privilege | Security | Determines the access to leads. | SRU | Full |
| OS: Sales Methodology | Opportunity UI | Determines the default sales methodology for an opportunity. | SARU | Blue Print |
| OS: Sort Area Size for TAP | Assignment | If the value is set, TAP sets the value of the database parameter sort_area_size with this value. Consult your DBA to set this value. Note: The value should be an integer value. The value set here is limited to the TAP program (the database setting for the rest of the application is not changed by this setting). Also, if the value of this profile is not set, then TAP does not alter the database settings. | S | N/A |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OS: Source Code Mandatory for Leads | Leads | Set the source code for mandatory leads. | S | No |
| OS: Source Code Required for Opportunity | Miscellaneous Opportunity Settings | Determines the source code required for opportunity. | S | No |
| OS: Territory Minimum Number of Records for Parallel Processing | Sales Generic | Determines the minimum number of records required to spawn multiple parallel workers for each transaction type. | S | 100 |
| OS: Time Frame for Opportunity Logs | Opportunity Data Tracking | Limits the number update records recorded to one in the specified time frame for Opportunity History. Options are None (no restrictions), Year, Quarter, Month, Week, Day, Hour, and Min. | S | None |
| OS: View Competitor Party Detail | Security | When set to 'No', then user cannot view the Opportunity's Competitor that he does not have the view access. If profile is set 'Yes' then user can view the Opportunity's competitor organization detail even he does not have view privileges. | S | Yes |
| OS: View Partner Party Detail | Security | When set to 'No', then user cannot view the Opportunity's Partner that he does not have the view access. If profile is set 'Yes' then user can view the Opportunity's partner organization detail even he does not have view privileges. | S | Yes |
| OTS: Application ID for TCA V2 API Input Parameter | TCA Settings | Defines application ID. | SARU | N/A |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Associate Relationship Location To Organization | Customer Settings | When you create a location information for a relationship, if this profile is set to Yes the same location information is also linked to the Organization of the relationship. If set to No, this will not occur. Oracle recommends you set this to No to minimize the number of addresses for the organization. | SARU | No |
| OTS: At a Glance Dashboard HGrid Expanded Display | At a Glance Settings | Determines whether the summary section hierarchy opens expanded (Yes) or collapsed (No) | SARU | Yes |
| OTS: At a Glance Display Menu | At a Glance Settings | Determines what objects appear in the At a Glance window. System Administrator can create menus and set this profile for different users. Select the menu name. | SARU | OTS: At a Glance Display Menu |
| OTS: At a Glance - Enable Dashboard Data Refresh at Form Startup | At a Glance Settings | If set to Yes, then runs the Customer Profile Engine concurrent program every time the At a Glance window is opened by any user. (The window opens more slowly when set to Yes.) If set to No, then you need to add the Customer Profile Engine concurrent program to the schedule. | S | No |
| OTS: At a Glance - Execute User Callouts For Data Refresh | At a Glance Settings | Set to Yes to use custom callouts for data refresh. | S | No |
| OTS: At a Glance - Number of Months of Data to Show | At a Glance Settings | You can set for 3 or 6 months. This controls the number of months of information the concurrent program OTS: At a Glance - Refresh Business Objects pulls. It also controls the time period for the notes displayed. | S | 3 |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Collateral Organization | Customer Settings | Optional. Set the inventory organization from which to obtain the collateral inventory items and shipping methods for the LOVs on the Collateral tab of the eBusiness Center. If not set, the organization used is the one set in OE_ORG_ID profile option.<br><br>If this profile is set, then when a user attempts to select event collateral that is restricted by operating unit access, the user receives this error message:<br><br>*The collateral associated with the selected event does not belong to your accessible Operating Unit(s). Please select a different event.* | SARU | N/A |
| OTS: Contact Role | Contacts UI | Sets the default contact role the contact created in the caller information section of eBusiness Center. | SAR | Contact |
| OTS: Customer - Display Inactive Records For Party List Of Values | Customer Settings | Set to Yes to display inactive as well as active customers in the Organization, First Name, and Last Name LOVs. Set to No to display only active records. | SARU | No |
| OTS: Customer-Include Address Style In Concatenated Format | Customer UI | Setting this profile option includes the address style in the concatenated global address format in the eBusiness Center. | SARU | N/A |
| OTS: Debug | Debug | Use to debug Oracle TeleSales. | SARU | No |
| OTS: Default Collateral Printer Name | Deployment | Determines the default printer for all collateral requests. | SARU | N/A |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Default Collateral Reply to Email Address | Collateral UI | Enter the email address you want collateral recipients to use when replying with collateral confirmation e-mail. Required for electronic collateral to work. | SARU | N/A |
| OTS: Default Collateral Subject Line | Collateral UI | Enter the subject line you want collateral recipients to use when replying with collateral confirmation e-mail. Required for electronic collateral to work. | SARU | N/A |
| OTS: Default Country | Customer UI | Sets the default country used for address creation. | SARU | US |
| OTS: Default Cover Letter for Collateral Requests | Collateral UI | Used to populate the cover letter item once a collateral is selected from the list of values. | SARU | N/A |
| OTS: Default Event Reply to Email Address | Miscellaneous UI | Enter the email address you want event enrollees to use when replying to enrollment confirmation e-mail. | SARU | N/A |
| OTS: Default Event Subject Line | Miscellaneous UI | Enter the subject line for the enrollment confirmation email. | SARU | N/A |
| OTS: Default Note Type | Miscellaneous UI | Defines the default type for a new note in the note tab in eBusiness Center, Lead Center, and Opportunity Center. | SARU | User Generated Note |
| OTS: Default Party Type | Customer UI | Sets the default party type for the caller information section of the eBusiness Center. Available values are: Person Organization Party Relationship | SARU | Party Relationship |
| OTS: Default Person Title | Customer UI | Sets the default title for a person. | SARU | N/A |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Default Phone Line Type | Customer UI | Sets the default phone line type. | SARU | Telephone |
| OTS: Default Relationship | Customer UI | The default relationship between parties. | SARU | Organization Contacts |
| OTS: Default Shipping Method for Electronic Collateral | Collateral UI | Defines the shipping method for electronic collateral. Populates the default shipping method for each recipient. | SARU | E-mail |
| OTS: Default Shipping Method for Physical Collateral | Collateral UI | Defines the default shipping method for physical collateral. Populates the default shipping method for each recipient. | SARU | N/A |
| OTS: Default Site Usage | Customer UI | Defines the default type for the identifying address when created from the eBusiness Center header while creating a new party. For example: Bill to, Ship to. | SARU | N/A |
| OTS: Default Tab in eBusiness Center | Customer UI | Determines which tab is active when the user launches the eBusiness Center. | SARU | eBC Overview Tab |
| OTS: Default Tab in Opportunity Center | Opportunity UI | Determines which tab is active when the user launches the Opportunity Center. The default tab is Purchase Interest. | SARU | Opportunity Center Purchase Tab |
| OTS: Default Tab in Sales Lead Center | Leads UI | Determines which tab is active when the user launches the Lead Center. The default tab is Purchase Interest. | SARU | Lead Center Purchase Interest Tab |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Default Task Date Type | Tasks UI | Sets the default date type in the Task tab for the eBusiness Center, Lead Center, and Opportunity Center. | SARU | N/A |
| OTS: Default Universal Search Tab | Search UI | Sets the Default Universal Search Tab. | SARU | Quick Search |
| OTS: Default Universal Search Type | Search UI | Sets the Default Universal Search Type. | SARU | Party Relationship |
| OTS: Default User Role | User UI | Determines the user's default role in Oracle TeleSales. | SARU | N/A |
| OTS: Default User Sales Group | User UI | Determines the user's default sales group in Oracle TeleSales. | SARU | N/A |
| OTS: Display Customer Profile | Customer Settings | A setting of *Yes* enables the customer profile area of the eBusiness Center. A setting of *No* means the fields are disabled. | SARU | No |
| OTS: Display Interaction History in Expanded Mode | Interaction History | Determines whether to display Interaction History in expanded mode or not. | SARU | No |
| OTS: Dump UWQ Params | Debug | Setting this profile dumps the parameters from UWQ into the Oracle TeleSales log file. This is used for debug purposes only. | SARU | No |
| OTS: Enable Dialing from eBusiness Center | Miscellaneous Functional | Yes enables dialing the soft phone by double-clicking the phone number. Oracle Advanced Inbound must be implemented. | SARU | No |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Enable Email Center Integration | Application Integration | If set to Yes, then Oracle eMail Center is implemented, and the agent is assigned the eMail Center role, the agent can click an e-mail address to open an e-mail addressed to the customer and send it using the eMail Center. If set to No, then the agent's default e-mail client opens. Profile can be set at site, application, and responsibility levels. It is not a user profile. | SAR | No |
| OTS: Enable Integrated Telephony Login | Application Integration | If set to Yes, then the choices Telephony Login and Telephony Logout appear on the Tools menu of the eBusiness Center form. If the profile is not set, it functions as No. Based on the value of the profile Customer Care: Telephony Screen Pop Mode, the Oracle Telesales profile value is validated. | SARU | Null |
| OTS: Enable SQL Tracing | Debug | To enable or disable SQL tracing. This is for debug purpose only. | SARU | No |
| OTS: Enable Web Collaboration | Application Integration | Set to Yes to be able to start an web collaboration from the Action menu. | SAR | No |
| OTS: Honor Interactions Profiles When CTI is Enabled | Integration History | Enable start of Interaction History in CTI mode | S | N/A |
| OTS: Identifying Address | Customer Settings | A *Yes* setting sets the address displayed in the header to be the identifying (primary) address for the party. | SARU | Yes |
| OTS: Interactions-Default Action | Interaction History | Creates a default interaction activity. When this profile is not set, the interaction is handled the same as Query. | SARU | Collaboration |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Interactions-Default Action Item | Interaction History | The application uses the default action item set in this profile together with the default action set in the profile OTS: Interaction -Default Action whenever the user does not perform an action required to wrap up an interaction.<br><br>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is the module name where the interaction is started. For example, if an interaction is started in opportunity center, then it is Opportunity. | SARU | Customer |
| OTS: Interactions-Default Outcome | Interaction History | This profile determines the default value of the Outcome field in the wrap-up window. If this profile is not set, then the outcome is handled as No Answer.<br><br>This is also the value the application uses for outcomes of interactions that are ended automatically. The application uses this value if there is no outcome associated with the campaign activity for this interaction. If there is a campaign associated with the interaction, then the application uses the outcome for that campaign activity.<br><br>If the default value for the profile option is removed, then the application functions as if the value is Outcome with outcome id = 1 (No Answer). | SARU | Not Available |
| OTS Interactions-Enable Auto Wrap-Up | Interaction History | When set to Yes, an interaction wraps up automatically without the display of the wrapup window. | SARU | No |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS Interactions-Enable Automatic Start | Interaction History | Enables automatic interaction tracking within Oracle TeleSales. A setting of No limits agents to starting interactions manually. | SARU | No |
| OTS Interactions-Enable Change Activity | Interaction History | Enables change of action and action item of system generated activities. | SAR | No |
| OTS: Interactions-Generate Collateral Activity | Interaction History | Enables the generation of collateral related activity through interaction history. | SARU | No |
| OTS: Interactions-Generate Customer Activity | Interaction History | Enables the generation of customer related activity through interaction history. | SARU | No |
| OTS: Interactions-Generate Event Activity | Interaction History | Enables the generation of event related activity through interaction history. | SARU | No |
| OTS: Interactions-Generate Lead Activity | Interaction History | Enables the generation of lead activity through interaction history. | SARU | No |
| OTS: Interactions-Generate Opportunity Activity | Interaction History | Enables the generation of opportunity activity through interaction history. | SARU | No |
| OTS: Interactions-Generate Query Activity | Interaction History | Enables the generation of query activity through interaction history. | SARU | No |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Interactions - Generate Service Request Activity | Interaction History | Enables the generation of service request activity through interaction history. | SARU | No |
| OTS: Interactions-Generate Task Activity | Interaction History | Enables the generation of task activity for interaction. | SARU | No |
| OTS: Interactions - Maximum Multiple Interactions | Interaction History | Controls the total number of simultaneous interactions that can be tracked | SARU | 1 |
| OTS: Interactions - Prompt for Wrapup | Interaction History | Set to yes if you want users to be prompted to close the current interaction when they start another simultaneous interaction. | SARU | Yes |
| OTS: Interactions-Record Media Item ID | Interaction History | Enables the recording of media item ID in interactions and activities. | SARU | Yes |
| OTS: Interactions-Start On Query | Interaction History | When interaction is enabled, setting this profile to Yes, starts an interaction when a record is queried. | SARU | No |
| OTS: JSP Details from OTS | Application Integration | By setting the profile, the user can allow JSP details in the TeleSales Application. If not set it is defaulted to No. The profile needs to be set to Yes to use the Sales Tools or view the source code from Marketing. | SAR | N/A |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Lead and Opportunity Center Party Relationship Interaction | Miscellaneous UWQ Settings | Enables the capture of interactions in the Lead and Opportunity Centers at the party relationship level.<br><br>If this profile is set to No, only organization level interactions are created. If this profile is set to Yes, then party relationship level interactions can be created. | S | No |
| OTS: Marketing List All Campaigns | Miscellaneous UWQ Settings | Determines whether all or only assigned campaigns are displayed in the Marketing List node in the UWQ. | SARU | No |
| OTS: Match DNIS FOR Source Code | Miscellaneous UWQ Settings | Set Yes for UWQ to search source codes by DNIS. | SARU | No |
| OTS: Max Interactions Displayed | Interaction History | Determines the maximum number of interactions to display in the overview tab.<br><br>The default is set at the system level. Option can be set at system, application, responsibility, and user levels. If the default value for the profile option is removed, then the application functions as if the value is 10. | SARU | 10 |
| OTS: Minimum Number of Characters for Lookup | Search UI | Improves search performance by forcing agents to use a minimum number of characters for their searches. The recommended number to specify is three. | SARU | None |
| OTS: Number of Active Saved Lists | Search | Agents can create their own lists using Universal Search and save them to be used in Universal Work Queue. This profile option restricts the number of active lists users can have for each of the following business objects: Collateral, Customer Key, Event, Lead, Opportunity, Organization, Party Relationship, Person, Quote, Smart Search, and Source Code. | SARU | 10 |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Number of Months to View Notes and Interactions | Notes | Default value for months of notes/interactions to view.<br><br>If the default value for the profile option is removed, then the application functions as if the value is 1. | SARU | 1 |
| OTS: Number of Records Per Saved List | Search | Sets the maximum number of records a user can save when saving a search performed in Universal Search as a list. What records are saved depends upon the sort order for the search. | SARU | 100 |
| OTS: Opportunity History Expanded Display | Opportunity UI | Set to Yes to display the Opportunity History log with all nodes expanded. Set to No to display in collapsed format. | SARU | Yes |
| OTS: Order History - Default value for the Filter | Orders | Sets the Order tab Filter By value. Valid values are Order Status, Order Type, Order Source, or null. | SARU | N/A |
| OTS: Order History - Number of Months to Display Orders | Orders | Determines the number of months to default for querying orders in the eBusiness Center. | SARU | N/A |
| OTS: Order Source Code | Orders | Enables ordering of collateral through order capture. | SARU | TeleSales Collateral |
| OTS: Primary Contact Role Flag | Contacts UI | Decides whether a role type is automatically flagged as primary or not in the Org Contact Roles window. | SAR | Yes |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Relate Account to Tasks and Notes | Notes<br><br>Tasks | Set to Yes to automatically add the account displayed in the eBusiness Center header as related to or referencing the task being created. Profile can be set at the site, application, and responsibility levels. | SAR | No |
| OTS: Relationship Plans - Enable Relationship Plans | Application Integration | Set to Yes to enable the relationship plans popup window from Oracle TeleService. | SARU | N/A |
| OTS: Sales Order Default Address Source | Orders | Determines the bill-to and ship-to party sites. | SR | Oracle TeleSales |
| OTS: Script Language | Scripting | Select the language to be used for scripts. If profile is not set, then the language is AMERICAN. | SARU | AMERICAN |
| OTS: Script Launch on Interaction | Scripting | Enables launch of scripting at the start of interaction. | SARU | N/A |
| OTS: Script Launch on UWQ Delivery | Scripting, Miscellaneous UWQ Settings | Enables launch of scripting at UWQ delivery. | SARU | N/A |
| OTS: Scripting-Apply Security for Suspended Scripts | Security | Determines if users can view and resume scripts that are suspended by other users. If set to Yes, then a user can only resume a script he suspended. If set to No, then a user can resume any script. | SARU | No |
| OTS: Scripting-Default Script | Scripting | Sets up a default script that is automatically started during call delivery. | SARU | N/A |
| OTS: Scripting Installation | Scripting | Enables the running of Oracle Scripting Embedded in Oracle Forms if scripting is installed. | SARU | No |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: Show Campaign and Offer Names Instead of Codes | Opportunity UI, Leads UI | If set to yes, displays the campaign and offer name instead of the campaign code. | SARU | No |
| OTS: Task Details-Query Task By | Tasks | Set to Source to display tasks based on the origin of the task. Set to Reference to display any tasks related to the customer. | SARU | Source |
| OTS: URL to Display a Map of the Address | Deployment | Set a URL to display a map of the address in the Address Tab of eBusiness Center | SARU | N/A |
| OTS: URL Web Collaborate Start Page | Deployment | Set to the URL that must be used for the web page for web collaboration. | SAR | N/A |
| OTS: Use Primary Address to Create Lead in UWQ | Miscellaneous UWQ Settings | Defines the primary address for a new lead. | SARU | N/A |
| OTS: Use Primary Address to Create Opportunity in UWQ | Miscellaneous UWQ Settings | Defines the primary address for a new opportunity. | SARU | N/A |
| OTS: UWQ - Auto Launch Lead and Oppty Center | Miscellaneous UWQ Settings | Enables the launch of the Lead Center and Opportunity Center from the UWQ. | SARU | N/A |
| OTS: UWQ Default Source Code | Miscellaneous UWQ Settings | Defines the Source Code to be used during Advanced Inbound Screen Pop | SARU | N/A |

| Profile Name | Category | Description | Level | Default |
|---|---|---|---|---|
| OTS: UWQ - Display Source Code and Name for Opportunity Nodes | Opportunity UI | Controls the display for opportunities in the UWQ. Valid values are None, Source Code Only, and Source Code and Name. | SARU | None |
| OTS: Validation Level for Sales Leads | Debug | Sets validation level for Sales Leads module used for debugging. | S | 90 |
| Task Manager: Default Assignee Status | Tasks UI | Sets the default task status in the Task Assignment window | SARU | Accepted |
| Task Manager: Default Priority | Tasks UI | Sets the default task priority in the Task tab of the eBusiness Center | SARU | Medium |
| Task Manager: Default Task Status | Tasks UI | Sets the default task status in the Task tab of the eBusiness Center | SARU | Open |
| Task Manager: Default Task Type | Tasks UI | Sets the default task type in the Task tab of the eBusiness Center | SARU | Meeting |
| Task Manager: Owner Type for Task | Tasks | Sets the owner type for a task. | SARU | N/A |

# B

# Concurrent Programs

This appendix covers the following topics:

- Table of Concurrent Programs

## Table of Concurrent Programs

The following table lists in alphabetical order the concurrent programs used by Oracle TeleSales. The table includes the following columns from left to right:

- **Mandatory:** Is the program mandatory for the function?

- **Concurrent Program Name:** Name of the concurrent program.

- **Description:** Explains what the concurrent program does.

| Mandatory | Concurrent Program Name or Group | Description |
|---|---|---|
| No | Assign Territory Accesses | This concurrent program assigns new territory access to sales force employees. The program prepares database tables for parallel processing.<br><br>Set the following profile options to 100000000 or more.<br><br>OS: Sort Area Size for TAP<br><br>OS: Hash Area Size for TAP<br><br>Run this program after completing the setups in Setting Up Territory Management, and after the JTF Concurrent program "Generate Territory Package" has run.<br><br>Parameters:<br><br>Run Mode (New/Total)<br><br>Lead Status: (All/Open/Closed)<br><br>Previous Request ID for restart mode only. |
| No | Autocreate Opportunity from Sales lead | Creates opportunities from existing sales leads. This program should be run after the Import Sales Leads program.<br><br>Parameters:<br><br>Debug Mode<br><br>Trace Mode |
| No | Calculate Party Totals | Calculates customer order information gathered in Oracle Order Management. It calculates the last ordered date and the lifetime value or a customer. The lifetime value is a sum of all orders in Order Management. |

| Mandatory | Concurrent Program Name or Group | Description |
|---|---|---|
| No | Drop Temp Tables for Home Page Materialized Views | This program cleans up all the Temp tables that were created during the Initial Load or Opportunity and Leads Reports bin jobs. It does not require any parameters. |
| | Flatten Employee Hierarchy | This concurrent program is ONLY meant to populate data in resource manager internal tables in order to expedite data display in "Organization" link for Employee hierarchy. |
| | | Schedule: For about 100,000 employees, this program takes about 2-3 minutes to run. It can be scheduled as a nightly process. |
| | Flatten Group Hierarchy | This program is used to denormalize the Resource Group hierarchy structure into a flat structure for fast and easy data access. |
| | | Schedule: For about 4000 groups, and average of 10 level hierarchy structure, this program takes about 10-15 minutes. It can be scheduled as a nightly process. |
| No | Generate Access Records | This is a child program of Assign Territory Accesses and does not need to be run separately. |
| | Generate Keys for Fuzzy Match | This program, available by logging in under the Receivable Manager responsibility, generates the keys for customer records already in the database. This program must be run before you import leads for the first time and anytime you change the lead import system profile options listed above, but you need not run it every time you import leads. The application generates keys for imported leads automatically |

| Mandatory | Concurrent Program Name or Group | Description |
| --- | --- | --- |
| No | Generate Self-Service Territories | Generates the physical territories for named account and geographic self-service territories. When it successfully completes, you must also run Synchronize Territory Assignment Rules. |
| No | Generate Territory Details | This request set runs Generate Self-Service Territories and Synchronize Territory Assignment Rules. |
| No | Synchronize Territory Assignment Rules | To build the territory assignment rules. Otherwise, your territories will not reflect the changes and will not work correctly when Assignment Manager assigns resources. |
| | | Builds the API that returns the winning territories and resources attached to the winning territories, which are defined in territory setup. |
| | Initial Build group-members tables for home bin | Should be run initially. Helps to improve the performance of forecast page when displayed in a home page bin. A materialized view called AS_GROUP_MV is created for faster lookup of group name or group member id. |
| Yes | Initial Build of Forecast Summary Tables | This program builds the materialized view used for forecasting. This program must be run initially before users can forecast. Run after Refresh AS_PERIOD_DAYS, Refresh of AS_PERIOD_RATES, and Refresh of AS_SALES_CREDITS_DENORM. |

| Mandatory | Concurrent Program Name or Group | Description |
|---|---|---|
| Yes | Initial Build of Opportunity and Lead Bins | Used for the Opportunity and New Leads home page bins and reports. This program must be run initially before users can set up opportunity and new leads bins and reports. This program loads the opportunity and leads materialized view with sales credit information. A new parameter: "Next Extent Size" has been added. You can choose the value of the next extent to be allocated for all tables and indexes created. Possible values for the parameter are: Small (1M), Medium (5M), Large (10M) |
|  |  | **Notes:** |
|  |  | This program must be run anytime the as_sales_credit_denorm is rebuilt or when values such as sales stages and statuses have changed. You should also run when Refresh AS_PERIOD_DAYS is run. |
|  |  | This program must be run: |
|  |  | Initially before users can set up Opportunity and Leads bins, charts, and reports. |
|  |  | Every time the as_sales_credit_denorm, JTF groups denorm or as_period_days is rebuilt or completely refreshed. |
|  |  | When values such as sales stages or statuses have been changed. |
|  |  | When snapshot logs and indices on base materialized views need to be re-created. |
|  |  | When reporting hierarchy or group usages are changed. |

| Mandatory | Concurrent Program Name or Group | Description |
|---|---|---|
| | Initial Build of Sales Home Page Data (request group) | This is a grouping of concurrent programs. Includes, Initial Build of Opportunity and Lead Bins, Initial Load for Lead Reports, and Initial Load for Opportunity Reports. |
| No | Initial Load of Opportunity Log Tables | This program 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 record in the log tables. The following profile options need to be set 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. |

| Mandatory | Concurrent Program Name or Group | Description |
|---|---|---|
| Yes | Initial Load for Lead Reports | This program is used to build Leads bins and reports. This should also be run following Refresh of Leads Bins Data so that you can see the latest values in leads reports.<br><br>**Notes:**<br><br>Users will not see leads in the bins and reports that were created after the last refresh of the summary tables.<br><br>This program should be run every time the concurrent program number 1 is run.<br><br>Prerequisite:<br><br>The prerequisites to running this program are: Initial Build of Opportunity and Leads Bins, the first time for complete refresh, and Refresh of Lead Bins Data, for incremental refresh.<br><br>If this job fails, run "Drop temp tables for Home Page MVs" to cleanup TEMP tables and then rerun Initial Load for Leads Reports. |
| Yes | Initial Load for Opportunities Reports | This program is used to build opportunity bins and reports. This should also be run following Refresh of Opportunity Bins Data so that you can see the latest values in opportunity reports. |
| No | Load Interest Types and Codes to Inventory Categories (Load Categories) | This concurrent program creates inventory categories under the inventory category set "Oracle Sales and Marketing" for each combination of interest types and codes. In order to use this concurrent program, the OS: Inventory Category Integration profile value must be set to Yes. |

| Mandatory | Concurrent Program Name or Group | Description |
|---|---|---|
| (obsolete) | Opportunity Exchange - Get Opportunities | (obsolete) This program polls the LETS server and retrieve the relevant partner opportunity details. This program should be run at regular intervals by users with Opportunity Exchange privileges. |
| (obsolete) | Opportunity Exchange - Push Opportunities | (obsolete) This program sends the information to the LETS server to be picked up by the partners. This program should be run at regular intervals by users with Opportunity Exchange privileges. |
| No | OTS: Load Sales Lead Interface Table from Flat File | Use this program to import 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. |
| Yes | Periodically Purge ASF_RECORD_VIEW_HISTORY | This table memorizes which records a user has visited. In order to prevent the table from growing too large, the program should be run as least once a week. If you are running on a database whose table space is a problem, run this program daily. |
|  | Pipeline Movement | This program moves sales teams and sales credits, and updates the opportunity owner when moving the pipeline from one sales representative to another. |

| Mandatory | Concurrent Program Name or Group | Description |
|---|---|---|
| Yes | Purge Deleted Lists | This program should be scheduled to run periodically. The time interval between any two schedules for this program should be at least the number of days specified for ASF_LIST_MIN_PURGE_AGE_IN_DAYS profile for maximum effectiveness. The program does not take any parameters.<br><br>A value of 10 is set for this profile (ASF_LIST_MIN_PURGE_AGE_IN_DAYS) and the concurrent program can be scheduled to run every 14 days if the profile has not been modified. These are suggested values for the profile and for periodically scheduling the concurrent program. They can be altered depending on the number of lists that are created or deleted within a short time period. |
| No | Refresh AS_PERIOD_DAYS table | This program must be run before you can run the Refresh of as_sales_credits_denorm (in complete mode), Initial Build of Opportunity Bins, Refresh Multi-Currency Conversion Rates, and the Build Materialized View for Forecast Main Page. This sequence of programs must be rerun if the GL period definitions are changed.<br><br>If this program is run, then the following programs must also be run: Refresh of AS_SALES_CREDITS_DENORM (Complete), Refresh of Forecast Summary Tables, Initial build of Opportunity Bins Data |

| Mandatory | Concurrent Program Name or Group | Description |
|---|---|---|
| | Refresh group-members tables for home bin | Should be run whenever there is a change in the sales hierarchy (and if "my home page report" is being used). These programs improve the performance of forecast page when displayed in a home page bin. A materialized view called AS_GROUP_MV is created for faster lookup of group name or group member id. |
| | Refresh Multi-Currency Conversion Rates (AS_PERIOD_RATES) | Refreshes the multi-currency conversion rates in setting multiple currency. These are pre-requisites for this program: Set up currency conversion rates, Set up reporting currencies, Set up period type/ conversion type mappings, Run concurrent program Refresh AS_PERIOD_DAYS table. |
| Yes | Refresh of as_sales_credits_denorm | Used for opportunity reports and forecasting functionality. This program must be run before user can run opportunity reports and perform forecasting functions. Parameters: Refresh Mode = complete refresh (Use this mode when running for the first time or doing a complete refresh). Incremental Refresh = Run in this mode for an incremental refresh |
| | Refresh of Forecast Summary Tables | This program is used to refresh the materialized view used for forecasting. This program should be run periodically. |

| Mandatory | Concurrent Program Name or Group | Description |
|---|---|---|
| No | Refresh of Leads Bin Data | This program is used to run an incremental refresh of the materialized view used for the Leads bins and reports. This program should be scheduled to run periodically.<br><br>**Note:** Users will not see leads in the bins, reports, or charts that were created after the last refresh of the base materialized view. |
| No | Refresh of Opportunity Status Aging Summary Table | Refreshes the summary data for opportunities that have been created or updated since the last refresh time.<br><br>This concurrent program was created to extract status log data from AS_LEADS_LOG, calculate the summary data from the log data, and refresh AS_LOG_STATUS_SUMMARY table with the summary data. |
| No | Refresh of Opportunity Bins Data | This program is used to run an incremental refresh of the materialized view used for the opportunity bins and reports. This program should be scheduled to run periodically.<br><br>**Note:** Users will not see opportunities in bins created after the last refresh of "refresh sales credit".<br><br>Users will not see opportunities in the bins, reports, or charts that were created after the last refresh of the base materialized view. |
|  | Refresh of Sales Home Page Data (request group) | This is a grouping of concurrent programs. Includes, Initial Load for Lead Reports, Initial Load for Opportunity Reports, Refresh of Lead Bins Data, and Refresh of Opportunity Bins Data. |

| Mandatory | Concurrent Program Name or Group | Description |
|---|---|---|
| | Setup Checking for Oracle Sales application | This program validates Sales Setups and produces an error log that the system administrator can use to diagnose invalid setups. Parameters:<br><br>Upgrade - Yes/No |

# C

# Lookups

This appendix covers the following topics:

- Levels of Modification
- Table of Lookups

## Levels of Modification

This appendix provides a table of the lookups used for Oracle TeleSales. The levels of modification are:

- **System (S)**: You can only change the wording of a list of values (LOV) choices the user sees on the screen. No deletions or additions are allowed.

- **Extensible (E)**: You can change both the wording of the LOV choices and add new choices for the user.

- **User (U)**: You can change the lookup completely by deleting and adding LOV choices.

For information on viewing and modifying lookups, refer to the *Oracle Applications System Administrator's Guide*.

## Table of Lookups

The following table lists lookups, their values or defaults, the areas they affect, and the access level.

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| | ASF_CHART_SERIES_COUNT | | Number of series to show in a chart. | U |
| | ASF_CHART_VALUE_TYPES | | Value type for Y axis in charts (Count/Amount). | U |
| | ASF_MODULE_FUNCTION_ATTR | | Lookup for default login page features. | U |
| | ASF_LIST_QUERY_FILTERS | Detail (Title, Gender, Sales Group) | Contact list filters | |
| | | Relationship (Person to Organization, Person to Person, Department Type, Job Title Type, Role) | | |
| | | Address (Country) | | |
| | | Customer Classification (Class Category) | | |
| | BUDGET_STATUS | APPROVED (Approved) | Leads budget status | |
| | | NOT_APPROVED (Not approved) | | |
| | | PENDING (Pending) | | |
| | CLOSE_REASON | A (Availability) | Leads close reason | |
| | | C (Competition) | | |
| | | F (Function) | | |
| | | P (Price) | | |
| | | S (Service) | | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| | DECISION_TIMEFRAME | 1-3 MONTHS | Leads time frame | |
| | | 3-6 MONTHS | | |
| | | 6-12 MONTHS | | |
| | | MORE THAN 1 YEAR | | |
| | | WITHIN 1 MONTH | | |
| | | WITHIN 1 WEEK | | |
| | LEAD_CONTACT_ROLE | DECISION_MAKER (Decision maker) | Leads contact role | |
| | | END_USER (End user) | | |
| | LINK_TYPE | | Lookup for tools administration page. | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| | OPP_LOG_TIMEFRAME | YEAR Logs are created. But no more than one Update log record will exist within the same year time frame. | Opportunity | |
| | | QUARTER Logs are created. But no more than on Update log record will exist within the same quarter time frame. | | |
| | | MONTH Logs are created. But no more than on Update log record will exist within the same month time frame. | | |
| | | WEEK Logs are created. But no more than on Update log record will exist within the same week time frame. | | |
| | | DAY Logs are created. But no more than on Update log record will exist within the same day time frame. | | |
| | | HOUR Logs are created. But no more than on Update log record will exist within the same hour time frame. | | |
| | | MINUTE Logs are created. But no more than on Update log record will exist within the same minute time frame. | | |
| | | NONE Logs are created without time frame restriction. | | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| | PARTY_RELATIONS_TYPE | BENEFACTOR_OF (Benefactor of) | Leads relationship type | |
| | | BOARD_MEMBER_OF (Board member of) | | |
| | | CONTACT_OF (Contact of) | | |
| | | CUSTOMER_OF (Customer of) | | |
| | | EMPLOYEE_OF (Employee of) | | |
| | | STOCK_HOLDER_OF (Stock holder of) | | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| | PARTY_RELATIONS_TYPE<br><br>(continued) | MEMBER_OF (Member) | | |
| | | MOTHER_OF (Mother) | | |
| | | OWNED_BY (Owned) | | |
| | | PARENT_OF (Parent) | | |
| | | PARTNER_OF (Partner) | | |
| | | PAYFROM_OF (Alternate party to pay for a buyer) | | |
| | | PAYTO_OF (Alternate payee name for the seller) | | |
| | | PUBLISHER (Publisher) | | |
| | | REFERENCE_FOR (Reference) | | |
| | | _OF (Relative) | | |
| | | REPAIR_DEPOT_PROVIDER_FOR (Repair depot provider) | | |
| | | REPORTS_TO (Reports to) | | |
| | | SELLER_FOR (Seller) | | |
| | | SELLER_TO (Seller to) | | |
| | | SHIPTO_OF (Alternate shipping party for the buyer) | | |
| | | SIBLING_OF (Sibling) | | |
| | | SISTER_OF (Sister) | | |
| | | SON_OF (Son) | | |
| | | SPOUSE_OF (Spouse) | | |
| | | STOCK_HOLDER_OF (Stockholder) | | |
| | | STUDENT_OF (Student) | | |
| | | SUBSIDIARY_OF (Subsidiary) | | |
| | | THIRD_PARTY_OF (Third party) | | |
| | | UNCLE_OF (Uncle) | | |

| App. | Lookup Type | Values | Affects | Level |
|---|---|---|---|---|
| | | VAD_OF (VAD of) | | |
| | | VAR_OF (VAR of) | | |
| | | VENDOR_OF (Vendor) | | |
| | RANK_ID | 1 (Cold lead) | Lead rank | |
| | | 2 (Low lead) | | |
| | | 3 (Medium lead) | | |
| | | 4 (Hot lead) | | |
| | REJECT_REASON _CODE | ASSIGN_ERROR (Assign error) | Leads decline reason | |
| | | DUPLICATE (Duplicate) | | |
| | | VACATION (Vacation) | | |
| | SALES_CHANNEL | DIRECT (Direct) | Sales Channel | S |
| | | INDIRECT (Indirect) | | |
| | STATUS_CODE | NEW (new) | Lead status | |
| | | UNQUALIFIED (unqualified) | | |
| | | QUALIFIED (qualified) | | |
| | | ACCEPTED (accepted) | | |
| | | LOSS (loss) | | |
| | | DEAD_LEAD (dead lead) | | |
| | | DECLINED (declined) | | |
| | | CONVERTED_TO_OPPORTU NITY (lead converted to opportunity) | | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
|  | VEHICLE_RESPONSE_CODE | EMAIL | Lead response channel |  |
|  |  | FAX |  |  |
|  |  | LETTER |  |  |
|  |  | PHONE |  |  |
|  |  | USER |  |  |
|  |  | VOICE_MESSAGES |  |  |
|  |  | WEB |  |  |
|  | RELATIONSHIP_TYPE | ALL (seeded value) | Accounts |  |
|  | TAX_CODE |  | Accounts |  |
|  | PAYMENT_TERM |  | Accounts |  |
| AMS | AMS_EVENT_PAYMENT_STATUS |  | Events |  |
| AR | ACCOUNT_STATUS |  | Accounts |  |
| AR | ACCT_ROLE_TYPE |  | Accounts |  |
| AR | ADDRESS_LABEL |  | eBusiness Center |  |
| AR | CODE_STATUS |  | Persons, organizations, Accounts |  |
| AR | COMMUNICATION_TYPE |  | Persons, organizations |  |

| App. | Lookup Type | Values | Affects | Level |
|---|---|---|---|---|
| AR | CONTACT_ROLE_TYPE | ADMINISTRATIVE_CONTACT_FOR (Administrative Contact For) | Persons, organizations | E |
| | | BILL_PRESENTMENT_ADMIN (Bill Presentment System Administrator) | | |
| | | BILL_PRESENTMENT_CSR (Bill Presentment System Customer Service Representative) | | |
| | | BILL_PRESENTMENT_ORG_REP (Bill Presentment System Organization Representative) | | |
| | | BILL_PRESENTMENT_SITE_ADMIN (Bill Presentment System Site Administrator) | | |
| | | BILL_TO (Bill To) | | |
| | | BUYING_CONTACT_FOR (Buying Contact For) | | |
| | | CEO_OF (CEO) | | |
| | | CFO_OF (CFO) | | |
| | | CIO_OF (CIO) | | |
| | | CONTACT (Contact) | | |
| | | CORR (Correspondence) | | |
| | | DEPT_HEAD (Department Head) | | |
| | | DUN (Dunning) | | |
| | | EXECUTIVE (Executive) | | |
| | | KEY_DECISION_MAKER_FOR (Key Decision Maker) | | |
| | | LEGAL (Legal) | | |
| | | LEGAL_CONTACT_FOR (Legal Contact For) | | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AR | CONTACT_ROLE_TYPE (continued) | MARKET (Market) | | |
| | | MIDDLE_MANAGER (Middle Manager) | | |
| | | PRIMARY_CONTACT_FOR (Primary Contact For) | | |
| | | RECEIVING_CONTACT_FOR (Receiving Contact For) | | |
| | | SHIPPING_CONTACT_FOR (Shipping Contact For) | | |
| | | SHIP_TO (Ship To) | | |
| | | STMTS (Statement) | | |
| | | STOCK_HOLDER_OF (Stock Holder) | | |
| | | TECHNICAL_CONTACT_FOR (Technical Contact For) | | |
| AR | CONTACT_TITLE | DR (Dr.) | Persons, organizations | E |
| | | MISS (Miss) | | |
| | | MR (Mr.) | | |
| | | MRS (Mrs.) | | |
| | | MS (Ms.) | | |
| | | SIR (Sir) | | |
| AR | CONTACT_TYPE | | Persons, organizations, events, collateral | |
| AR | COUNTRY | | eBusiness Center, persons, organizations, leads, opportunities, events lookup, scripting | |
| AR | CREDIT_RATING | | Persons, Organizations | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AR | CUSTOMER_CATE GORY | CUSTOMER (Customer) PROSPECT (Prospect) | Accounts. persons, organizations | E |
| AR | CUSTOMER_TYPE | | eBusiness Center | |
| AR | DAY | | eBusiness Center, persons, organizations, accounts, leads, opportunities, events, collateral, lookup, Universal Work Queue | |
| AR | DECISION_FACTO R_TYPE | | Accounts, Opportunity Contacts | |
| AR | DECISION_PRIORI TY_TYPE | | Accounts | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AR | DEPARTMENT_TYPE | ACCOUNTING | Persons, organizations, lookup | U |
| | | ADMINISTRATION | | |
| | | CUSTOMER SERVICE | | |
| | | DISTRIBUTION/LOGISTICS | | |
| | | ENGINEERING | | |
| | | FACILITIES | | |
| | | HUMAN RESOURCES | | |
| | | INFORMATION TECHNOLOGY | | |
| | | LEGAL | | |
| | | MANUFACTURING | | |
| | | MARKETING | | |
| | | MERCHANDISING | | |
| | | OPERATIONS | | |
| | | PURCHASING | | |
| | | QUALITY ASSURANCE | | |
| | | R&D (Research & Development) | | |
| | | RISK ANALYSIS | | |
| | | SALES | | |
| | | TRAINING | | |
| AR | FOLLOW_UP | | Opportunities, Universal Work Queue | |
| AR | FORM_NAME | | eBusiness Center, persons, organizations, leads, quotes/orders, Universal Work Queue | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AR | INTEREST_TYPE | ENTERTAINMENT | Leads, opportunities, lookup | E |
| | | HOBBIES | | |
| | | PREFERENCES | | |
| | | SPORTS | | |
| | | TRAITS | | |
| AR | JOB_TITLE_CODE | | Persons, Organizations | |
| AR | LANGUAGE | ENG (English) | Persons, organizations, opportunities, events, lookup, scripting | E |
| | | FRE (French) | | |
| | | GER (German) | | |
| | | ITA (Italian) | | |
| | | SPA (Spanish) | | |
| AR | MONTH | | Lookup | |
| AR | NOTE_TYPE | | eBusiness Center, leads, opportunities, events | |
| AR | OWNER_TABLE_ NAME | | Persons, organizations, opportunities, lookup | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AR | PARTY_RELATIONS_TYPE | ADVERTISER (Advertiser) | Persons, Organizations | |
| | | AFFILIATE_TO (Affiliate) | | |
| | | AGREEMENT_SIGNER_OF (Party that signs agreement on behalf of another party) | | |
| | | ASSOCIATE_OF (Associate of) | | |
| | | AUNT (Aunt) | | |
| | | BENEFACTOR_OF (Benefactor of) | | |
| | | BENEFICIARY (Beneficiary) | | |
| | | BILLER_AT (When an organization is registered biller) | | |
| | | BILLER_FOR (Biller For) | | |
| | | BILLTO_OF (Alternate billing party for the buyer) | | |
| | | BILL_CONSOLIDATOR_AT (Bill consolidator at) | | |
| | | BILL_CONSOLIDATOR_FOR (Bill Consolidator for) | | |
| | | BILL_PRESENTER_FOR (Bill Presenter at) | | |
| | | BILL_PUBLISHER_AT (Bill publisher at) | | |
| | | BILL_PUBLISHER_FOR (Bill publisher for) | | |
| | | BOARD_MEMBER_OF (Board Member) | | |
| | | BROTHER_OF (Brother) | | |
| | | BUSINESS_PARTNER_FOR (Business partner | | |
| | | CEO_OF (CEO) | | |
| | | CFO_OF (CFO) | | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| | | CHANNEL_FOR (Channel) | | |
| | | CHILD_OF (child of) | | |
| | | CIO (CIO) | | |
| | | COMPETITOR_OF (Competitor) | | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AR | PARTY_RELATIONS_TYPE | CONSULTANT_FOR (Consultant) | | |
| | (continued) | CONTACT_OF (Contact) | | |
| | | CONTAINS_MEMBER (Contains member) | | |
| | | COUSIN_OF (Cousin) | | |
| | | CUSTOMER_OF (Customer) | | |
| | | DAUGHTER_OF (Daughter) | | |
| | | DEPENDENT_OF (Dependent) | | |
| | | DIVISION_OF | | |
| | | DOMESTIC_PARTNER_OF (Domestic Partner) | | |
| | | DOMESTIC_SUBSIDIARY_OF (Domestic subsidiary of) | | |
| | | DOMESTIC_ULTIMATE_OF (Domestic Ultimate of) | | |
| | | EMPLOYEE_OF (Employee) | | |
| | | EMPLOYER_OF (Employer) | | |
| | | FATHER_OF (Father of) | | |
| | | FIELD_SERVICE_PROVIDER_FOR (Field Service provider) | | |
| | | GENERAL_EMPLOYEE_OF (General Employee) | | |
| | | GLOBAL_SUBSIDIARY_OF (Global subsidiary of) | | |
| | | GLOBAL_ULTIMATE_OF (Global Ultimate of) | | |
| | | GUARANTOR_FOR (Guarantor) | | |
| | | GUARDIAN_OF (Guardian) | | |
| | | HEADQUARTERS_OF | | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| | | (Headquarters of) | | |
| | | KEY_DECISION_MAKER_FOR (Key decision maker) | | |
| | | LEGAL_COUNSEL_FOR (Legal counsel for) | | |
| | | MANAGER_OF (Manager_of) | | |

| App. | Lookup Type | Values | Affects | Level |
|---|---|---|---|---|
| AR | PARTY_SITE_USE_CODE | ACK (Acknowledgments) | Persons, Organizations | |
| | | ADMINISTERED_BY (Administered By) | | |
| | | BILL_TO (Bill To) | | |
| | | BOL (Bills of Lading) | | |
| | | BUSINESS (Business) | | |
| | | CM (Credit Memos) | | |
| | | COLLATERAL_MAIL_TO (Collateral Mail To) | | |
| | | CORR (Correspondence) | | |
| | | CUSTOMER_REGION (Customer Region) | | |
| | | DELIVER_TO (Deliver To) | | |
| | | DRAWEE (Drawee) | | |
| | | DUN (Dunning) | | |
| | | GENERAL_MAIL_TO (General Mail) | | |
| | | HEADQUARTERS_FOR (Headquarters for) | | |
| | | HOME (Home) | | |
| | | INCORPORATED_TO (Incorporated) | | |
| | | INSTALL_AT (Install At) | | |
| | | INV (Invoice) | | |
| | | ISSUED_BY (Issued By) | | |
| | | KEY_SITE (Key Site) | | |
| | | LEGAL (Legal) | | |
| | | LEGAL_ADDRESS_OF (Legal Address) | | |
| | | LEGAL_RESIDENCE_OF (Legal Residence) | | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| | | MARKET (Market) | | |
| | | MARK_FOR (Mark For) | | |
| | | NOT_ALLOWED_INTO (Not Allowed Into) | | |
| | | OFFER_TO (Offer to) | | |
| AR | PARTY_SITE_USE_CODE (continued) | OTHER (Other) | | |
| | | PAYMENT_WILL_BE_MADE_BY (Be Made By) | | |
| | | PAY_TO (Pay To) | | |
| | | REPLY_TO (Reply To) | | |
| | | REPORT_TO (Report To) | | |
| | | RESIDES_AT (Resides At) | | |
| | | SHIP_FROM (Ship From) | | |
| | | SHIP TO (SHIP_TO) | | |
| | | SOLD_TO (Sold To) | | |
| | | STMTS (Statements) | | |
| | | STORE (Store) | | |
| | | SUPPORT_SITE (Support Site) | | |
| | | WORKS_AT (Works At) | | |
| | | WORK_PERFORMED_AT (Work Performed At) | | |
| AR | PARTY_TYPE | | eBusiness Center, persons, organizations, accounts, leads, opportunities, quotes/orders, events, collateral | |
| AR | PAYMENT_TYPE | | Events | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AR | PHONE_LINE_TYPE | FAX (Fax) | Persons, organizations, opportunities | E |
| | | GEN (General) | | |
| | | IW (Inbound watts) | | |
| | | OW (Outbound watts) | | |
| | | VM (Voice mail) | | |
| | | ASSISTANT (Assistant) | | |
| | | HOME (Home) | | |
| | | MOBILE (Mobile) | | |
| | | OFFICE (Office) | | |
| | | PAGER (Pager) | | |
| AR | PREFERENCES | | eBusiness Center | |
| AR | REASON | | Persons, organizations, leads, opportunities, events, Universal Work Queue | |
| AR | REFERENCE | | eBusiness Center | |
| AR | REFERENCE | | Persons, organizations, accounts, leads, opportunities, lookup, Universal Work Queue | |
| AR | RELATIONSHIP_TYPE | | Persons, organizations, lookup | |
| AR | REMIT | | Persons, organizations | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AR | RESPONSIBILITY | APC (Accounts Payable Clerk) | Persons, organizations, Universal Work Queue | E |
| | | APS (Accounts Payable Supervisor) | | |
| | | ARC (Accounts Receivable) | | |
| | | ARS (Accounts Recievable Supervisor) | | |
| | | CFO (Chief Financial Officer) | | |
| | | COLCT (Collections) | | |
| | | COLCTSUP (Collections Supervisor) | | |
| | | CONTRLR (Controller) | | |
| | | GLC (General Ledger Clerk) | | |
| | | GLS (General Ledger Supervisor) | | |
| | | SOC (Sales Operation Clerk) | | |
| | | SOS (Sales Operations Supervisor) | | |
| | | TRSUR (Treasurer) | | |
| AR | ROLE_LEVEL | | Persons, organizations | |
| AR | SELECT_TYPE | | Persons, organizations | |
| AR | SITE_USE_CODE | | Persons, Organizations | |
| AR | STATE | AK | eBusiness Center, persons, organizations, accounts, leads, opportunities, collateral, lookup, scripting, Universal Work Queue | |
| | | AL | | |
| AR | SUBJECT_TABLE | | Persons, organizations | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AS | ACCESS_PRIVILEGE | F (Full unrestricted access) <br><br> P (Prospecting Access) <br><br> T. (Sales Team Access) | Access privilege for employee | S |
| AS | ASTATA_RUN_MODE | New (Run program in new mode) <br><br> Restart (Run program after new mode stopped) <br><br> Total (Run program in total mode to refresh all access records) | Run mode for Territory Assignment concurrent program | S |
| AS | AUTO_ASSIGNMENT_TYPE | Both <br><br> None <br><br> PRM <br><br> TAP | Automatic assignment type | S |
| AS | BUDGET_AMOUNT | | Leads, lookup | |
| AS | BUDGET_STATUS | | Leads, lookup | |
| AS | CLOSE_REASON | | Leads, opportunities | |
| AS | CLOSE_REASON | A (Availability) <br><br> C (Competition) <br><br> F (Function) <br><br> P (Price) <br><br> S (Service) | Opportunity close reason | E |
| AS | CONTACT_RANK_ON OPPORTUNITY | DECISION_MAKER <br><br> END_USER | Opportunity contact rank | U |
| AS | DECISION_TIMEFRAME | | Leads | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AS | FLAG | N (No) | Flag | S |
| | | Y (Yes) | | |
| AS | INTEREST USE | COMPANY_CLASSIFICATION (Customer Classification) | Interest use | S |
| | | CONTACT_INTEREST (Contact Interest) | | |
| | | LEAD_CLASSIFICATION (Lead or Opportunity Classification) | | |
| AS | INTEREST_USE | | Opportunities | |
| AS | ISSUE | | eBusiness Center, leads, opportunities | |
| AS | LEAD_CONTACT_ROLE | | Leads | |
| AS | LEAD_SOURCE | | Leads, opportunities | |
| AS | MC_DATE_MAPPING_TYPE | E (End date of a period) | Date mapping type | U |
| | | S (Start date of a period) | | |
| AS | METHODOLOGY_TYPE | OOP (Object Oriented) | Opportunity methodology type | E |
| AS | OPP_ACCESS_PRIVILEGE | F (Full Unrestricted Access) | Opportunity access privilege | S |
| | | O (Full Access by Operating Unit) | | |
| | | P (Prospecting Access) | | |
| | | T (Sales Team Access) | | |
| AS | OPP_PROBABILITY_LINK | Error (New value is not acceptable) | Opportunity probability links | S |
| | | Warning (Warn user about error) | | |

| App. | Lookup Type | Values | Affects | Level |
|---|---|---|---|---|
| AS | PLAN_ELEMENT_ MAPPING | PCODE (Map quota to primary interest code) | Sales categories mapping with sales quotas (Oracle Incentive Compensation) | S |
| | | SCODE (Map quota to secondary interest code | | |
| | | TYPE (Map quota to interest type) | | |
| AS | PRM_LEAD_TYPE | | Opportunities | |
| AS | REJECT_REASON_ CODE | ASSIGN_ERROR | Leads | |
| | | DUPLICATE | | |
| | | VACATION | | |
| AS | ROLE_TYPE | | Persons, Organizations, accounts, lookup | |
| AS | ROLE_TYPE | AM (Account Manager) | Role type | U |
| | | PS (Product Specialist) | | |
| AS | SALESFORCE_REL ATIONSHIP | | Opportunities | |
| AS | SCD_REFRESH_M ODE | 1 (Complete refresh) | Sales Credit Denorm refresh mode | U |
| | | 2 (Incremental refresh) | | |
| AS | SCD_RUN_MODE | 1 (Complete) | Sales Credit Denorm run mode | E |
| | | 2 (Update) | | |
| AS | UPDATE_ACCESS | | eBusiness Center | |
| AS | UPDATE_ACCESS | I (Inherit data) | Update access | S |
| | | R (View data) | | |
| | | U (Update subordinate's data) | | |
| AS | VEHICLE_RESPO NSE_CODE | | Leads | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AS | VEHICLE_RESPONSE_CODE | | Opportunities | |
| AS | VEHICLE_RESPONSE_CODE | | Lookup | |
| ASF | ASF_CHART_COLOR_PALETTE | #99cccc | Charts | S |
| | | #336699 | | |
| | | #cccc33 | | |
| | | #ccff99 | | |
| | | #339966 | | |
| | | #9999ff | | |
| | | #996633 | | |
| | | #99cc33 | | |
| | | #0066cc | | |
| | | #ffcc00 | | |
| | | #009999 | | |
| | | #999999 | | |
| | | #cccc66 | | |
| | | #666699 | | |
| | | #ccccff | | |
| ASO | ASO_ITEM_TYPE | | Accounts | |
| ASO | ASO_QUOTE_RELATED_OBJECTS | | Quotes/Orders | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| AST | AST_SEARCH_VIEW_BY_LIST | CAMPAIGN | Universal Search | S |
| | | COLLATERAL | | |
| | | CUSTOMERKEY | | |
| | | EVENT | | |
| | | LEAD | | |
| | | OPPORTUNITY | | |
| | | QUOTE | | |
| HZ | HZ_TYPE_OF_SCHOOL | | Person Details in TeleSales | E |
| JTF | ACTION_TYPE | ADD | Events, Universal Work Queue | |
| | | ANSWER | | |
| | | CREATE_FSR | | |
| | | DEL | | |
| | | INQ | | |
| | | INTERACT | | |
| | | RECONCILE | | |
| | | SENT | | |
| | | TRANSFER | | |
| | | UPD | | |
| | | UPDATE_FSR | | |
| | | UPSELL | | |
| | | WAIT | | |
| | | XSELL | | |
| JTF | ROLE_TYPE | | Sales Team | |

| App. | Lookup Type | Values | Affects | Level |
|------|-------------|--------|---------|-------|
| OTS | Quick Find Types | Account Number | eBusiness Center: Quick Find field | User |
| | | Service Request Number | | |
| | | Service Key | | |
| | | Telephone Number | | |
| | | Organization number | | |
| | | Person number | | |
| | | Relationship number | | |
| | | Tax ID | | |
| | | Quote number | | |
| | | Order number | | |
| | | Contract number | | |

# Index