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PeopleSoft

PeopleSoft CRM 9.2: Sales

June 2020

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Contents

Preface

Understanding the PeopleSoft Online Help and PeopleBooks

The PeopleSoft Online Help is a website that enables you to view all help content for PeopleSoft applications and PeopleTools. The help provides standard navigation and full-text searching, as well as context-sensitive online help for PeopleSoft users.

Hosted PeopleSoft Online Help

You can access the hosted PeopleSoft Online Help on the Oracle Help Center. The hosted PeopleSoft Online Help is updated on a regular schedule, ensuring that you have access to the most current documentation. This reduces the need to view separate documentation posts for application maintenance on My Oracle Support. The hosted PeopleSoft Online Help is available in English only.

To configure the context-sensitive help for your PeopleSoft applications to use the Oracle Help Center, see Configuring Context-Sensitive Help Using the Hosted Online Help Website.

Locally Installed Help

If you're setting up an on-premise PeopleSoft environment, and your organization has firewall restrictions that prevent you from using the hosted PeopleSoft Online Help, you can install the online help locally. See Configuring Context-Sensitive Help Using a Locally Installed Online Help Website.

Downloadable PeopleBook PDF Files

You can access downloadable PDF versions of the help content in the traditional PeopleBook format on the Oracle Help Center. The content in the PeopleBook PDFs is the same as the content in the PeopleSoft Online Help, but it has a different structure and it does not include the interactive navigation features that are available in the online help.

Common Help Documentation

Common help documentation contains information that applies to multiple applications. The two main types of common help are:

- Application Fundamentals
- Using PeopleSoft Applications

Most product families provide a set of application fundamentals help topics that discuss essential information about the setup and design of your system. This information applies to many or all applications in the PeopleSoft product family. Whether you are implementing a single application, some combination of applications within the product family, or the entire product family, you should be familiar with the contents of the appropriate application fundamentals help. They provide the starting points for fundamental implementation tasks.

In addition, the *PeopleTools: Applications User's Guide* introduces you to the various elements of the PeopleSoft Pure Internet Architecture. It also explains how to use the navigational hierarchy, components, and pages to perform basic functions as you navigate through the system. While your application or implementation may differ, the topics in this user's guide provide general information about using PeopleSoft applications.

Field and Control Definitions

PeopleSoft documentation includes definitions for most fields and controls that appear on application pages. These definitions describe how to use a field or control, where populated values come from, the effects of selecting certain values, and so on. If a field or control is not defined, then it either requires no additional explanation or is documented in a common elements section earlier in the documentation. For example, the Date field rarely requires additional explanation and may not be defined in the documentation for some pages.

Typographical Conventions

The following table describes the typographical conventions that are used in the online help.

Typographical Convention	***Description***
Key+Key	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For Alt+W, hold down the Alt key while you press the W key.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.
⇒	This continuation character has been inserted at the end of a line of code that has been wrapped at the page margin. The code should be viewed or entered as a single, continuous line of code without the continuation character.

ISO Country and Currency Codes

PeopleSoft Online Help topics use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

ISO country codes may appear as country identifiers, and ISO currency codes may appear as currency identifiers in your PeopleSoft documentation. Reference to an ISO country code in your documentation does not imply that your application includes every ISO country code. The following example is a country-specific heading: "(FRA) Hiring an Employee."

The PeopleSoft Currency Code table (CURRENCY_CD_TBL) contains sample currency code data. The Currency Code table is based on ISO Standard 4217, "Codes for the representation of currencies," and also relies on ISO country codes in the Country table (COUNTRY_TBL). The navigation to the pages where you maintain currency code and country information depends on which PeopleSoft applications you are using. To access the pages for maintaining the Currency Code and Country tables, consult the online help for your applications for more information.

Region and Industry Identifiers

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

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

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in the PeopleSoft Online Help:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Translations and Embedded Help

PeopleSoft 9.2 software applications include translated embedded help. With the 9.2 release, PeopleSoft aligns with the other Oracle applications by focusing our translation efforts on embedded help. We are not planning to translate our traditional online help and PeopleBooks documentation. Instead we offer very direct translated help at crucial spots within our application through our embedded help widgets. Additionally, we have a one-to-one mapping of application and help translations, meaning that the software and embedded help translation footprint is identical—something we were never able to accomplish in the past.

Using and Managing the PeopleSoft Online Help

Select About This Help in the left navigation panel on any page in the PeopleSoft Online Help to see information on the following topics:

- Using the PeopleSoft Online Help
- Managing Hosted online help
- Managing locally installed PeopleSoft Online Help

PeopleSoft CRM Related Links

Oracle Help Center

PeopleSoft Online Help Home

PeopleSoft Information Portal

My Oracle Support

PeopleSoft Training from Oracle University

PeopleSoft Video Feature Overviews on YouTube

PeopleSoft Business Process Maps (Microsoft Visio format)

PeopleSoft Spotlight Series

Contact Us

Send your suggestions to psoft-infodev_us@oracle.com. Please include the applications update image or PeopleTools release that you're using.

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Chapter 1

Getting Started with PeopleSoft Sales

PeopleSoft Sales Overview

To drive profitable revenue growth, you need to align your sales strategy with customer needs and corporate objectives. This strategy must be supported by the territory and incentive structure, and requires real-time visibility across multiple channels to optimize your sales processes in response to market changes. You also need to ensure that your sales force has the right capabilities and tools to execute the strategic plan. PeopleSoft Sales enables you to:

- Leverage the right channels, resources, and offerings to differentiate your business from others and prevail over the competition.
- Motivate and track sales performance using metrics-driven planning and compensation tools.
- Increase operational efficiency by integrating sales processes across the enterprise.
- Extend your sales reach through different channels.
- Maximize sales productivity and build profitable, loyal customer relationships.

PeopleSoft Sales enables you to enter, assign, and track sales leads and opportunities. After you have entered sales opportunities into your database, you can view the opportunity pipeline and generate forecasts to manage your sales efforts successfully.

With this application, you can:

- Define a territory tree that represents the sales organization.
- Create or import sales leads.
- Convert a lead to an opportunity.
- Create sales opportunities.
- Assign a lead or opportunity to a sales representative by using the territory tree.
- Include opportunities in sales forecasts.
- Roll up forecasts in the territory tree.

PeopleSoft Sales Integrations

PeopleSoft Sales integrates with these PeopleSoft applications:

- PeopleSoft Order Capture.

- PeopleSoft Marketing.
- PeopleSoft Online Marketing.

We discuss integration considerations in the implementation topics in this product documentation.

Supplemental information about third-party application integrations is located on the Oracle website.

PeopleSoft Sales Incentive Management

The Incentive Management solution addresses the definitive goals of mature incentive management software, which are to capture and calculate incentive pay data, to administer compensation information that can be communicated to incentive plan participants in a timely and accurate manner, and to adjust compensation information as needed before final payout. This solution supports global incentive management needs regardless of your organization's size.

Sales Incentive Management is the first product category offering within the Incentive Management solution and is designed to meet the needs of incentive management for sales organizations. This product category is built upon the Incentive Management (EIM) foundation and consists of the High Tech and Industrial market template and the Banking and Capital Markets market template.

See *PeopleSoft Sales Incentive Management 8.9 PeopleBook*

See *PeopleSoft Sales Incentive Management for Banking and Capital Markets 8.9 PeopleBook*

See *PeopleSoft Sales Incentive Management for High Tech and Industrial 8.9 PeopleBook*

PeopleSoft Sales Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding product documentation.

PeopleSoft Sales also provides component interfaces for loading data from an existing system into PeopleSoft Sales tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the components that have component interfaces:

Component	***Component Interface***	***Reference***
Industry RSF_INDUSTRY	RSF_INDUSTRY_SCI	See "Defining Industries" (PeopleSoft CRM 9.2: Business Object Management).
Territory Node RSF_TERRITORY	RSF_TERRITORY_SCI	See Territory Definitions Page.
Sales Users RSF_SUSER	RSF_SUSER_SCI	See Setting Up Sales Users.

Component	Component Interface	Reference
Sales Team RSF_TEAM	RSF_TEAM_SCI	See Setting Up Sales Teams.
Account Auto-assignment Options for Lead and Opportunity RSF_ASGN_OPTIONS	RSF_ASGN_OPTIONS_CI	See Setting Up Account-Based Assignment Options.

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft CRM 9.1 Application Fundamentals PeopleBook* with information about where to find the most current version of each.

See *PeopleTools: Component Interfaces* and *PeopleTools: Setup Manager* product documentation.

Chapter 2

Navigating in PeopleSoft Sales

Navigating in PeopleSoft Sales

PeopleSoft Sales provides custom functional area navigation pages that contain groupings of folders that support a specific business process, task, or user role.

Note: In addition to PeopleSoft Sales custom navigation pages, PeopleSoft provides menu navigation, standard navigation pages, and PeopleSoft Navigator.

Related Links

Application Fundamentals

Pages Used to Navigate in PeopleSoft Sales

This table lists the custom navigation pages that are used to navigate in PeopleSoft Sales.

Sales Center

The Sales Center custom navigation pages are geared to the person in your organization who is focused on performing various sales related activities.

Page Name	***Usage***
Sales Center Page	Access primary Sales Center menus.
Calendars, Tasks, Call Reports Page	Review and update tasks, events that are recorded on the monthly calendar and call reports. Add or update call reports. Access the My Calendar, My Tasks, Add Call Report, and Search Call Reports pages.
Contacts Page	View and manage your hot contacts. Access the My Contacts, Add Person, Search Person, and My Accounts pages.
Leads Page	Create new leads, find and manage existing leads that return based on search criteria. Access the Add Lead and Search Leads pages.

Page Name	***Usage***
Opportunities Page	Create new opportunities, find and manage existing opportunities that return based on search criteria. View forecast pipeline for opportunities. Access the Add Opportunity, Search Opportunities, and Review Pipeline pages.
Forecasts Page	Adjust and analyze revenue projections from alternative perspectives. Access the Search My Forecasts, Search Rollup Forecasts, and Lock Forecast pages.
Salesforce Page	Adjust and redistribute leads, opportunities, tasks, and territories to accommodate changes in your team and organization. Access the Reassign Sales Activities, Search Reassignments, Reorganize Territories, and Search Reorganizations pages.

Chapter 3

Setting Up Business Units for PeopleSoft Sales

Understanding Business Units in PeopleSoft Sales

Business units are used across PeopleSoft product lines to define an organization for reporting purposes. Business units in PeopleSoft Sales might be defined by geographic location, product line, fulfillment center, or some other organization-specific guideline. The Sales business unit also provides a mechanism for defining defaults and processing controls used when creating leads and opportunities.

Related Links

"Understanding Business Units in PeopleSoft CRM" (PeopleSoft CRM 9.2: Application Fundamentals)

Setting Up Business Units for PeopleSoft Sales

To set up business units for PeopleSoft Sales, use the Sales Definition (RSF_BUS_UNIT_TBL) component.

This topic discusses how to create business unit definitions for PeopleSoft Sales.

Page Used to Set Up Business Units for PeopleSoft Sales

Page Name	***Definition Name***	***Usage***
Sales Definition Page	RSF_BUS_UNIT_TBL	Create business unit definitions for PeopleSoft Sales.

Sales Definition Page

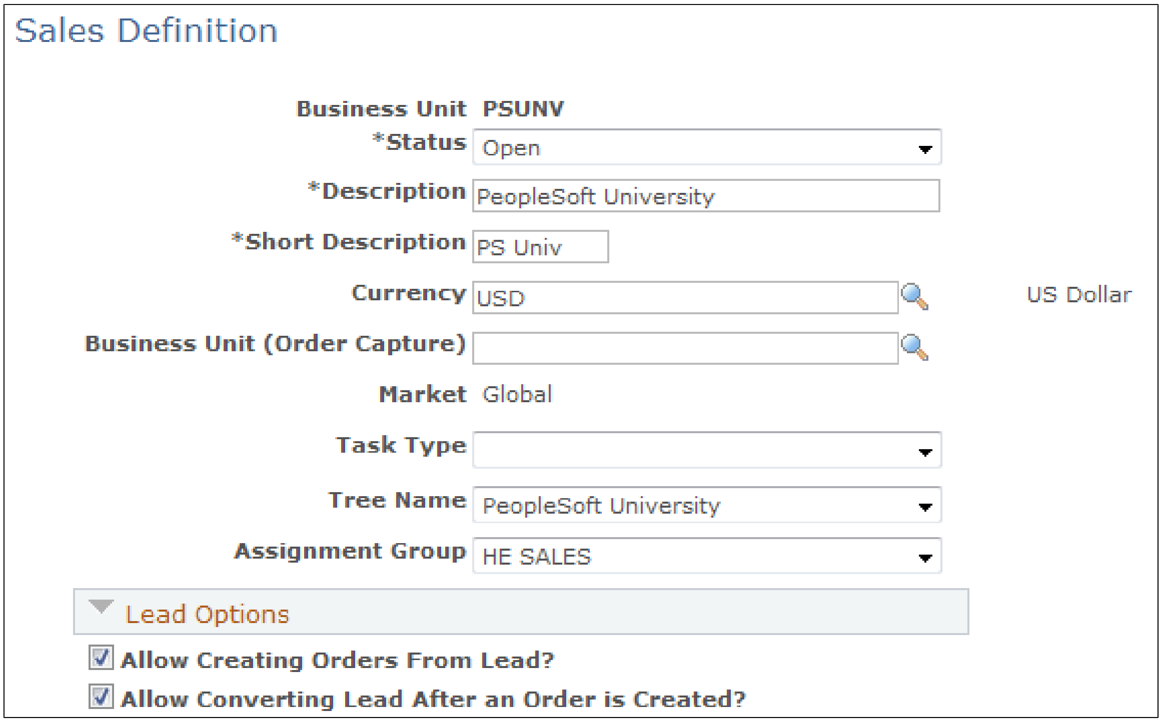
Use the Sales Definition page (RSF_BUS_UNIT_TBL) to create business unit definitions for PeopleSoft Sales.

Navigation

Set Up CRM > Business Unit Related > Sales Definition > Sales Definition

Image: Sales Definition page

This example illustrates the fields and controls on the Sales Definition page.



Status

Select the business unit's status, either *Open* or *Closed.*

Default Set ID

Select the setID to be associated with the business unit.

After you click the Create BU button, this field is no longer available.

Currency

Enter the currency to use as the business unit's default currency.

Business Unit (Order Capture)

Enter the PeopleSoft Order Capture business unit to use with the PeopleSoft Sales business unit if you have also licensed PeopleSoft Order Capture. The Order Capture business unit defined here appears by default in the quotes and orders that are generated when a lead or opportunity is converted to a quote or order.

Note: In addition to entering the Order Capture business unit, you must specify the third-party tax vendor (such as Taxware, Vertex, or WorldTax) on the Order Capture Business Unit Definition page. If you don't specify a tax vendor for the Order Capture business unit, no tax calculations can be included in quotes and orders.

Market

By default, the Market field is set to *Global.* You cannot change this value.

Task Type

Select the type of task to use as the default task for the business unit. When you create a task in the Lead or Opportunity component, the system uses the default task type defined here.

Tree Name

Select the territory tree name to use as the default territory tree for the business unit.

See Understanding Territory Trees.

Create BU (create business unit)

Click this button to create the PeopleSoft Sales business unit.

Assignment Group

Select the assignment group to use as the default assignment group for the business unit. You must click the Create BU button before you can select the assignment group.

See Assign Group Page.

Lead Options

Allow Creating Orders From Lead

Select to enable users to create orders from leads that belong to the business unit. When this check box is deselected, users cannot create orders from leads associated with the business unit. Depending on whether your organization has a short or long sales cycle, use this check box to control whether you can use a lead to create an order without converting the lead to an opportunity.

Allow Converting Lead After Order is Placed

Select to enable users to convert leads in the business unit to opportunities, even if an order has been placed. When this check box is deselected, users cannot convert the business unit's leads to opportunities after an order is placed.

Chapter 4

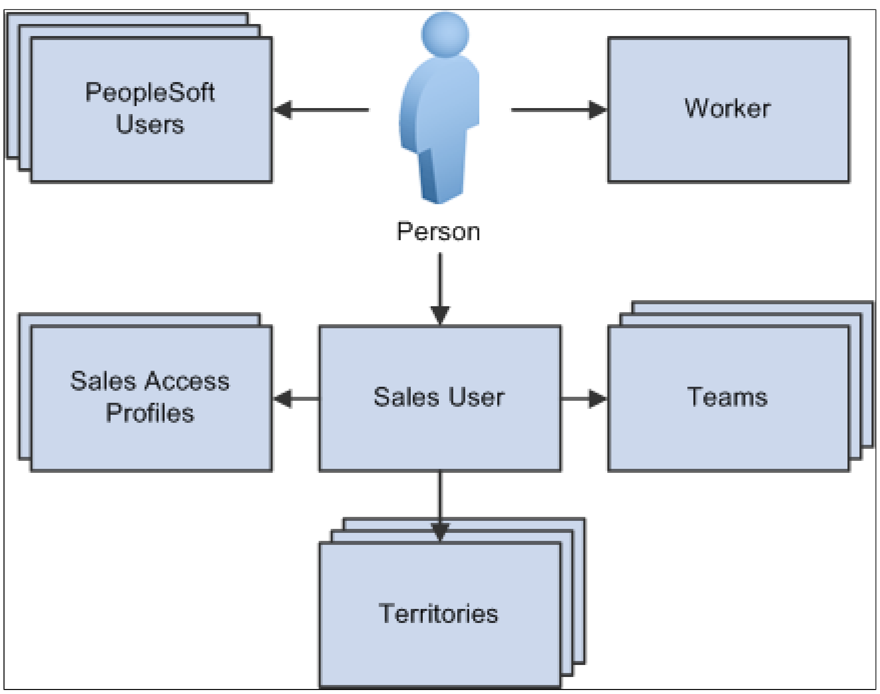
Setting Up Sales Security and Personalization

Understanding Sales Users

In PeopleSoft Sales, users include sales representatives, sales managers, sales product managers, administrators, technical support staff, and other members of the organization. A sales user is a person that exists in the Customer Data Model (CDM) and is associated with a sales user setting, which includes a sales access profile. Typically a sales user is a member of at least one sales team and territory. This diagram illustrates the relationship between sales users, access profiles, teams, and territories:

Image: Definition of sales users and relationship with other sales components (sales access profiles, sales teams and territories)

This diagram illustrates the relationship between sales users, access profiles, teams, and territories.



To enable an individual to use PeopleSoft Sales, create the following objects in the system:

- Person (business contact or worker).

  To create a person in the customer data model:

  - Navigate to Customers CRM > Add Person and create the individual (such as a contact and consultant who needs access to the sales application) as a person in the business contact role with a person ID.

  The contact flag is set to *External* for business contacts.

  - Navigate to Workforce > Add Worker and create the individual (such as employee who needs access to the sales application) as a person in the worker role with a person ID and an employee ID.

    The contact flag is set to *Internal* for workers.

- PeopleSoft user profiles.

  After defining the person, associate the person with a user profile (user ID), which you set up in PeopleTools, or from the Person or Worker component.

  A person can be associated with multiple user profiles.

  See *PeopleTools: Security Administration* product documentation.

- Sales access profiles.

  When you define a sales user, you assign a sales access profile. Sales access profiles group actions that are granted to sales users regarding leads, opportunities, territory management, pipeline, and forecasts. Generally, these profiles correspond to employee roles in the organization. You can assign one or more sales access profiles to each sales user.

  For example, you might create an access profile of Sales Manager and enable sales users with that access profile to adjust forecasts and to view and update calendars for all staff who are visible to them on the territory tree. Another sales access profile, Sales Administrator, might enable users with that sales access profile to view and edit revenue allocations. If you associate both Sales Manager and Sales Administrator with a sales user, that user has the combined privileges of both access profiles.

- Sales user.

  Create a sales user definition for the person by person ID using the Sales Users (RSF_SUSER) component. The sales user definition specifies the default values used by the sales user and the data that the sales user can see.

  See Setting Up Sales Users.

- Teams.

  A sales user can be associated with different types of teams:

  - Sales teams are groups of sales users who work together to sell products or services.

    You can associate an entire sales team with a particular lead or opportunity.

  - Account teams are groups of sales users who are responsible for sales and service to specific customer accounts.

    A sales user is also assigned to a territory team, which is the group of sales users who are assigned to a territory.

  - Territory teams are groups of sales users who are assigned to the same territory on the territory tree.

Note: Adding or removing a sales user from a lead or opportunity does not change the territory team to which that sales user belongs; it adds or removes the user only from the sales team for that opportunity.

- Territories.

  Each sales user can belong to multiple territories. Territories represent functional divisions of an organization, often identified by geographical region or product line. Assign sales users to territories on the Territory Definition page or on the Sales User - Visibility page.

Use dataset rules to restrict visibility into territory trees. To create a dataset rule against a territory tree, use views that show a flattened tree: RSF_ACC_MGR_VW to see all the people on the territory tree below a specific manager and RSF_ACC_SUSER to see the territories below a specific territory.

Most of the data security in the Sales application is driven by the person ID and where the sales user is located in the territory tree. Person ID is associated with user ID. This enables *View as Owner* rules where every sales representative can see the leads and opportunities they own. %PersonID is set dynamically, based on the user who is signed in, as follows: SELECT PERSON_ID FROM PSOPRALIAS WHERE OPRID = %UserID AND OPRALIASTYPE = 'PER'. You can enable *View as Manager* on one of the flattened tree views mentioned above to permit a manager to see all leads and opportunities that are owned by the employees who report to the manager.

You can initiate a search for sales users from a business process.

Related Links

"Understanding PeopleSoft CRM Security" (PeopleSoft CRM 9.2: Application Fundamentals)
Setting Up Sales Teams
Understanding Territory Trees
Enterprise Components

Setting Up Sales Access Profiles

To set up sales access profiles, use the Sales Access Profile (RSF_ACC_PROFILE) component.

This topic discusses how to set up sales access profiles.

Page Used to Set Up Sales Access Profiles

Page Name	***Definition Name***	***Usage***
Setting Up Sales Access Profiles	RSF_ACC_PROFILE	Set up sales access profiles by creating profile roles and assigning functional user privileges to them.

Sales Access Profile Page

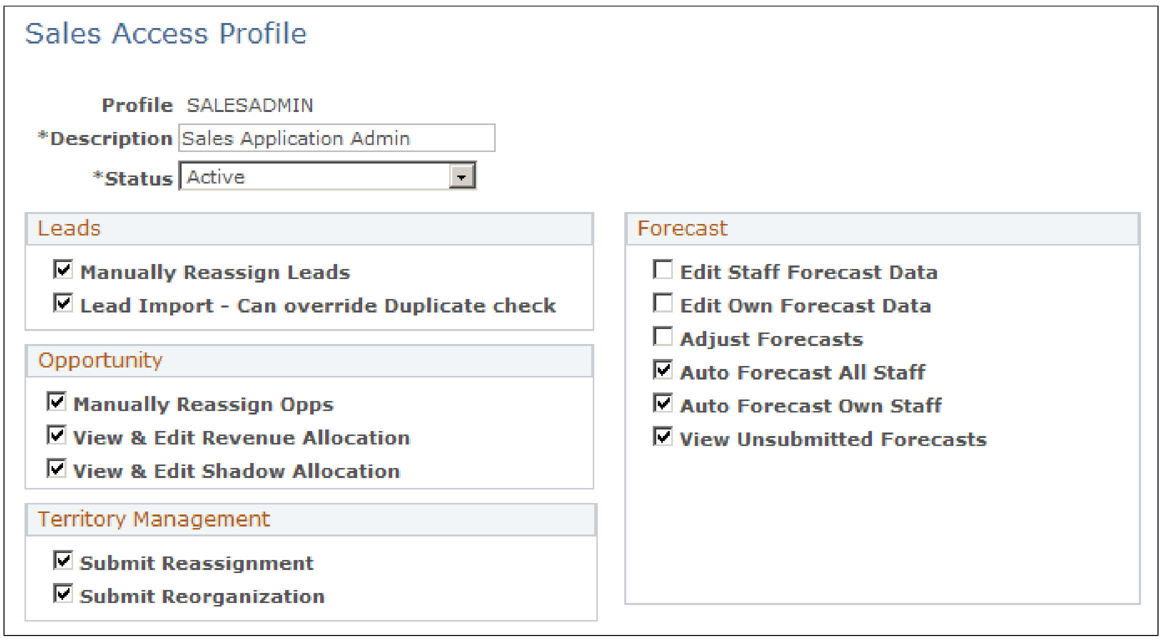
Use the Sales Access Profile page (RSF_ACC_PROFILE) to set up sales access profiles by creating profile roles and assigning functional user privileges to them.

Navigation

Set Up CRM > Product Related > Sales > Security and Personalization > Sales Access Profiles > Sales Access Profile

Image: Sales Access Profile page

This example illustrates the fields and controls on the Sales Access Profile page.



Create a sales access profile and select the access controls for users associated with that profile.

PeopleSoft Sales delivers these predefined sales access profiles, which you can modify or supplement to meet your business needs:

- Channel Reseller Rep.
- Financial Controller.
- Inside Sales Rep.
- Sales Lead Qualifier.
- Product Manager.
- Sales Application Admin.
- Sales Executive.
- Sales Manager w/Auto Forecast.
- Sales Manager - Limit Forecast.

- Sales User - Field Rep.

Leads

Manually Reassign Leads	Select to enable the user to reassign leads to different sales representatives. If this check box is deselected, all assignment-related fields on a lead (Territory, Region, Sales Team, and so on) are unavailable to this user. See Reassign Sales Activities Page.
Lead Import - Can override Duplicate check	Select to enable the user to override data when Dedup check boxes are selected on the Lead Import Template page. This permits the user to import data even if it is a duplicate. See Importing Sales Lead Data.

Opportunity

Manually Reassign Opps (manually reassign opportunities)	Select to enable the user to reassign opportunities to different sales representatives. If this check box is deselected, all assignment-related fields on an opportunity (Territory, Region, Sales Team, and so forth) are unavailable to this user. See Reassign Sales Activities Page.
View & Edit Revenue Allocation	Select to enable the user to view and edit the revenue allocation percentages that you allocate to the sales teams for an opportunity. Revenue percentage is used to allocate opportunity revenue for revenue forecasting. See Opportunity - Assign Page.
View & Edit Shadow Allocation	Select to enable the user to view and edit the shadow percentages and shadow amounts that you allocate to individual members of the sales team for an opportunity. Shadow percentage and allocation are used to allocate opportunity revenue for shadow forecasting. See Opportunity - Assign Page.

Territory Management

Submit Reassignment	Select to enable the user to modify the system's automated reassignment of leads or opportunities during the tree reorganization process. See Reorganizing a Territory Tree.
Submit Reorganization	Select to enable the user to reorganize territories and people on any of the organization's territory trees.

See Reorganizing a Territory Tree.

Forecast

Edit Staff Forecast Data	Select to enable the user to edit forecast data for all staff that are visible to the user on any of the organization's territory trees. See Managing Forecasts.
Edit Own Forecast Data	Select to enable the user to edit his or her own forecast data. Edit activity overwrites existing data. See Adding and Adjusting Forecasts.
Adjust Forecasts	Select to enable the user to add rows to adjust a forecast. Adjustment activity remains visible. See Adding and Adjusting Forecasts.
Auto Forecast All Staff	Select to enable the user to autogenerate forecasts at any time for all staff. See Generating Forecasts Automatically.
Auto Forecast Own Staff	Select to enable the user to autogenerate forecasts at any time for the user and all persons who fall below the viewer on a tree. See Generating Forecasts Automatically.
View Unsubmitted Forecasts	Select to enable the user to view forecasts that have been saved but not submitted for all staff that are visible to the user.

Setting Up Sales Users

To set up sales users, use the Sales Users (RSF_SUSER) component.

This topic discusses how to:

- Create a sales user.
- Define a sales user's visibility.
- Define a sales user's pipeline targets.
- Define a sales user's revenue quotas.
- Define a sales user's product unit quotas.

Note: Before you can set up an individual as a sales user, the individual must exist as a PeopleSoft user with a user ID in PeopleTools and as a PeopleSoft CRM contact with a person ID.

See *PeopleTools: Security Administration*product documentation.

See "Defining Information for Business Contacts" (PeopleSoft CRM 9.2: Business Object Management).

Pages Used to Set Up Sales Users

Page Name	Definition Name	Usage
Sales User Page	RSF_SUSER1	Create a sales user by defining defaults and associating sales and account access profiles with the user.
Sales Access Details Page	RSF_SUSER_ACC_SEC	View details of the selected sales access profile to determine whether it is the appropriate profile to assign.
Person (Business Contact) Page Worker Page	RD_PRSN_PRIMARY	Enter an employee's worker data, including address, phone, and email information.
Visibility Page	RSF_SUSER2	Define a sales user's visibility by identifying territories to which an individual has access.
Pipeline Targets Page	RSF_SUSER_QS	Define a sales user's pipeline targets.
Revenue Quota Page	RSF_SUSER_QR	Define a sales user's quotas including both revenue and shadow.
Unit Quota Page	RSF_SUSER_QU	Define a sales user's product unit quotas.

Sales User Page

Use the Sales User page (RSF_SUSER1) to create a sales user by defining defaults and associating sales and account access profiles with the user.

Navigation

Set Up CRM > Product Related > Sales > Security and Personalization > Sales Users > Sales User

Image: Sales User page (1 of 2)

This example illustrates the fields and controls on the Sales User page (1 of 2).

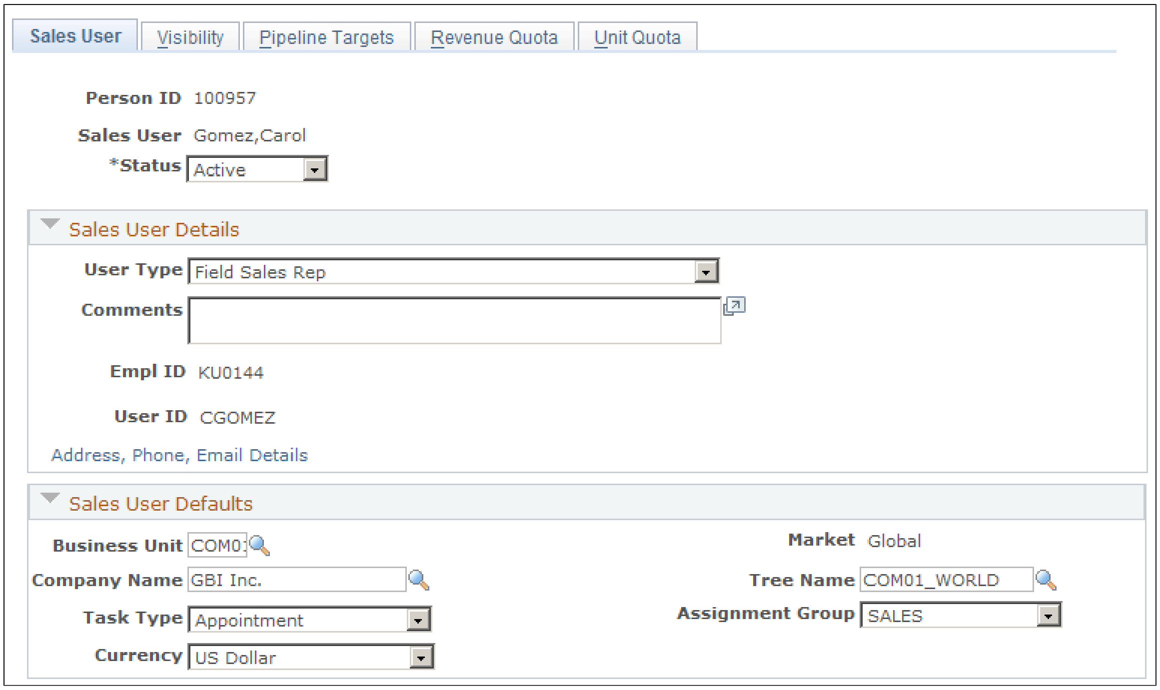
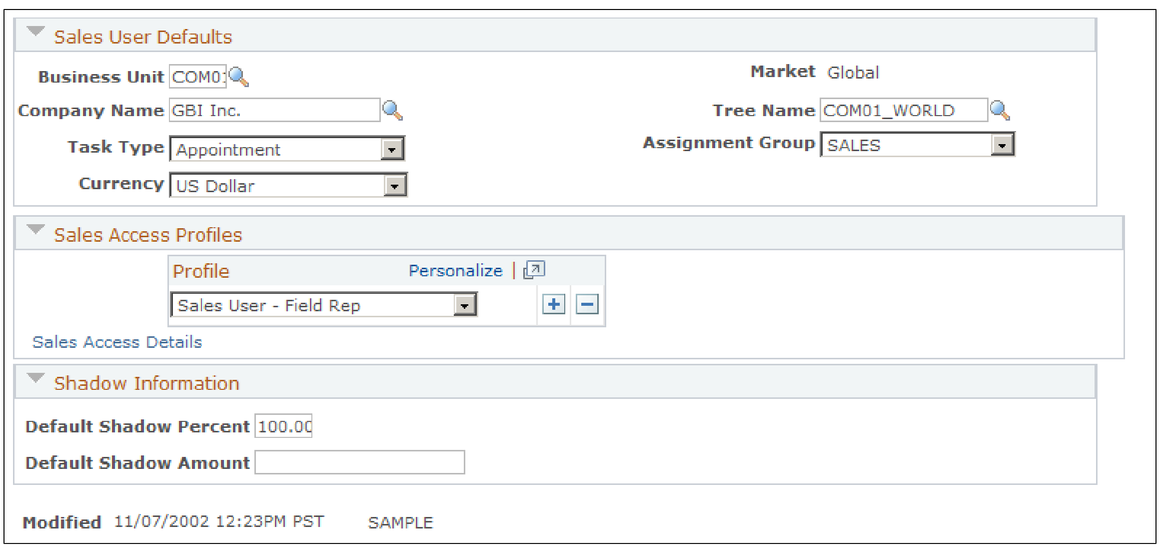


Image: Sales User page (2 of 2)

This example illustrates the fields and controls on the Sales User page (2 of 2).



Person ID	Displays the person ID of the sales user. See "Defining Information for Business Contacts" (PeopleSoft CRM 9.2: Business Object Management).

Sales User Details

User Type	Select the type of sales user to create. Values are *Executive Sales Manager, Field Sales Rep, Inside Sales Rep, Pre-Sales*

	Consultant, Sales Administrator, Sales Manager, and *Sales Tech Support*. Sales user types are translate values.
EmplID (employee ID)	Displays the employee ID from the Worker page, if the individual is an employee.
User ID	Displays the user ID with which the individual is associated in PeopleTools.
Address, Phone, Email Details	Click to access the Worker page, where you can view an individual's personal and employee contact data. See "Creating Workers" (PeopleSoft CRM 9.2: Business Object Management).

Sales User Defaults

If a sales user is associated with multiple values for items in this section, the system displays the default value that you specify here and provides a drop-down list box (or a similar page control) with the sales user's other values.

Business Unit	Enter the business unit for the leads and opportunities that the sales user creates. The business unit controls the setID, customers, and products to which the sales user has access, and it is a required field for sales users who are in the active status.
Company Name	Enter the name of the company whose accounts the sales user handles or with which the sales user is most often associated.
Task Type	Select the type of task with which the sales user is most often associated.
Currency	Select the currency in which to express revenues for the sales user.
Market	By default, this field is set to *Global* for all sales users. You cannot change this value.
Tree Name	Displays the tree that is associated with the selected business unit in the business unit definition. If the business unit does not have a specified tree, no default value is populated in this field.
Assignment Group	Select the assignment group to use for the sales user. The values that are available in this field are assignment groups that were defined for the setID with which the selected business unit associates. See Assign Group Page.

Sales Access Profiles

Profile

Select a sales access profile to provide functional sales abilities for the sales user and to control the sales data that the sales user can view and modify. Set up sales access profiles on the Sales Access Profile page.

See Setting Up Sales Access Profiles.

Sales Access Details

Click to access the Sales Access Details page.

Shadow Information

Default Shadow Percent and **Default Shadow Amount**

Enter the percentage or amount to use as the allocation for the sales user. For example, suppose that an agreement specifies that the sales user earns a minimum 2 percent on all revenues that the user generates. In that case, you would enter *2* in the Default Shadow Percent field. If the agreement specifies that the sales user earns a minimum of 100.00 USD for each opportunity, then enter *100* in the Default Shadow Amount field.

Managers can override the default percentage or amount at the transaction level.

Related Links

Forecasts

Visibility Page

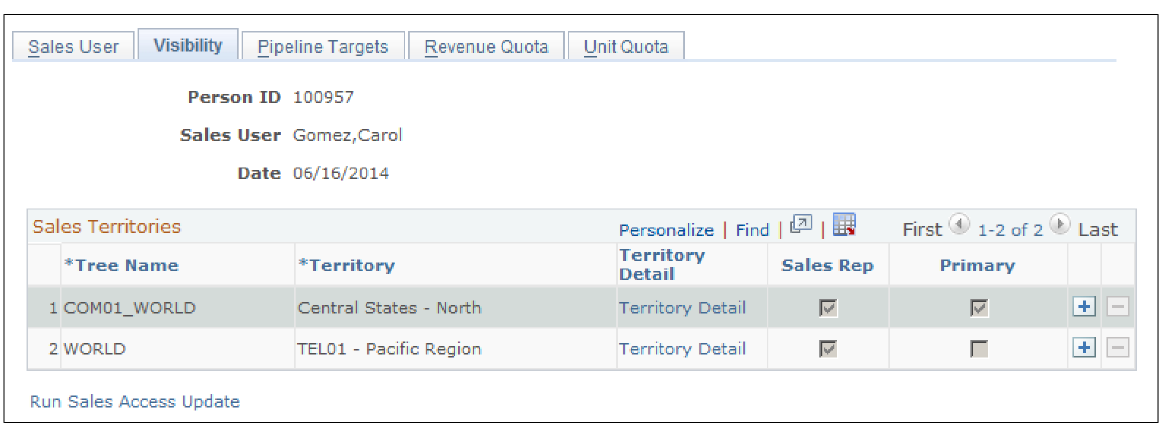
Use the Visibility page (RSF_SUSER2) to define a sales user's visibility by identifying territories to which an individual has access.

Navigation

Set Up CRM > Product Related > Sales > Security and Personalization > Sales Users > Visibility

Image: Visibility page

This example illustrates the fields and controls on the Visibility page.



Tree Name and **Territory**	Displays the trees and territories to which the sales user has access and on which the sales user is a territory team member. Click the button with the plus sign to insert a row and add another tree or territory. You can click the button with the minus sign to delete the row before you save the page. After you save the page, the button with the minus sign is no longer available.
Territory Detail	Click to access the Territory Definitions page, where you can view information about the territory and click the button with the minus sign to remove the sales user from the territory team. When you click OK, the system returns you to the Visibility page for the same sales user. The row for the removed territory no longer appears.
Sales Rep (sales representative)	Indicates that the sales user is a sales representative (as opposed to a worker or other position) and is available for territory assignment.
Primary	Indicates that the sales user is the primary sales representative for the territory.
Run Sales Access Update	Click to access the Sales Access Update page, where you can update sales users and their access. **Note:** Each time that you create a sales user or change a user's visibility settings, you must run the Sales Access Update process to apply the changes.

Pipeline Targets Page

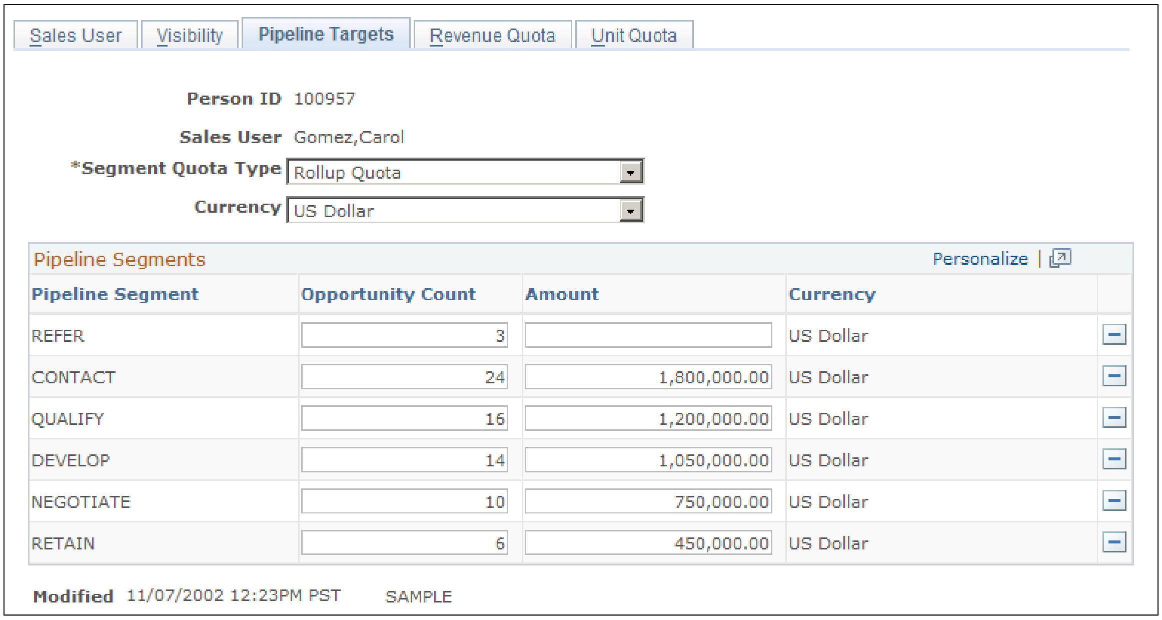
Use the Pipeline Targets page (RSF_SUSER_QS) to define a sales user's pipeline targets.

Navigation

Set Up CRM > Product Related > Sales > Security and Personalization > Sales Users > Pipeline Targets

Image: Pipeline Targets page

This example illustrates the fields and controls on the Pipeline Targets page.



Pipelines compare real-time activities to the activity that is required to meet a quota. A pipeline includes segments that correlate to steps in your organization's sales process. In the example, the pipeline segments correlate to the steps in the PeopleSoft Knowledge-Enabled Sales (KES) process: Contact, Qualify, Develop, Negotiate, and Retain.

Use this page to specify the targets that the sales user must reach for each segment to meet the overall quota.

Segment Quota Type

Select the type of quota to use for the sales user's pipeline segments. Values are:

Manager Quota: The manager's own quota.

Rollup Quota: The sum of quotas for all sales representatives who report to the manager.

Quota information is used in pipeline as well as in forecasting.

Currency

Displays the currency that you specified on the Sales User page. You can specify a different currency in which to express pipeline amounts.

Pipeline Segment

Displays the pipeline segments that correlate to your sales process.

Opportunity Count and **Amount**

Enter the number of opportunities that the sales user must have within this segment to meet quota for the pipeline segment. Enter the monetary amount required to meet quota for the segment. A segment can have an opportunity count, a monetary amount, or both.

For example, if the sales user must have a minimum of five opportunities in the Contact step of the process at any given time, then enter *5* in the Opportunity Count field. Typically, you do not use a monetary amount for this segment. However, for the Negotiate step, you might require an opportunity count of *10* or a monetary amount of *50,000* (to indicate $50,000) to meet quota for this step.

Revenue Quota Page

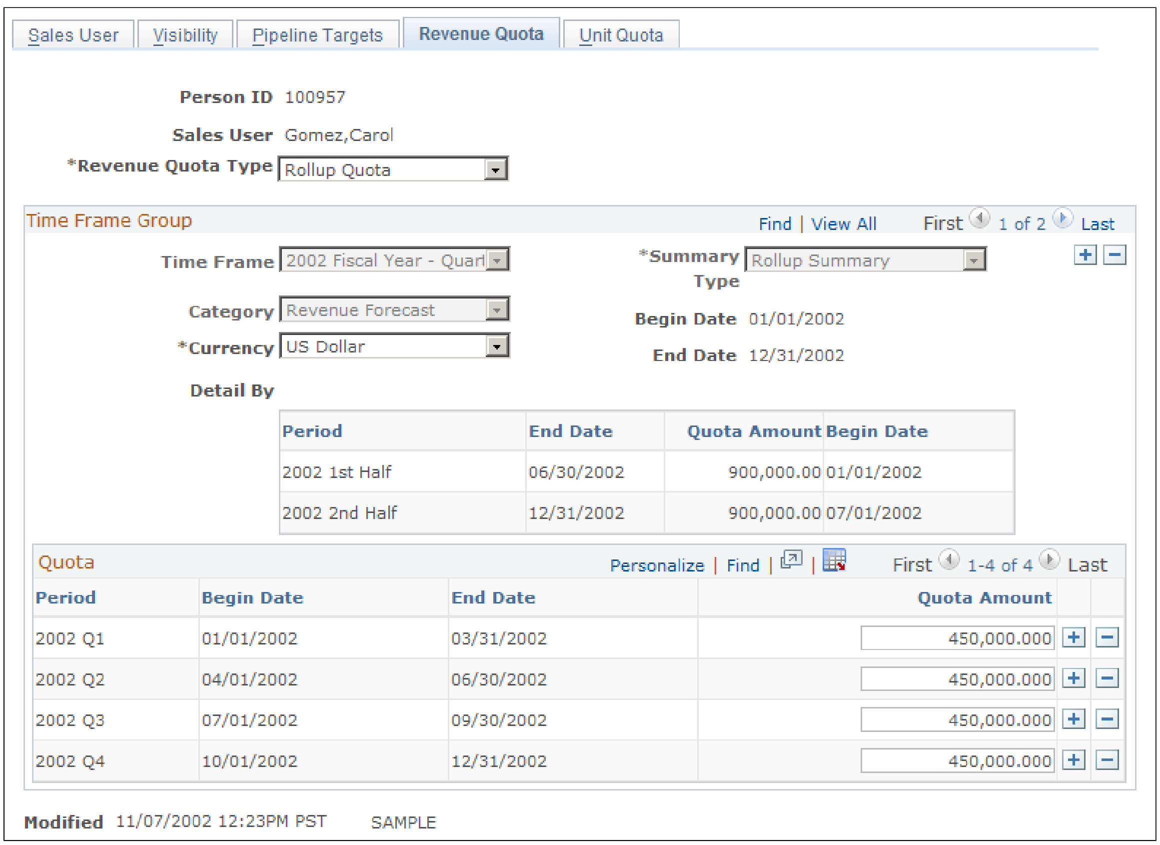
Use the Revenue Quota page (RSF_SUSER_QR) to define a sales user's quotas including both revenue and shadow.

Navigation

Set Up CRM > Product Related > Sales > Security and Personalization > Sales Users > Revenue Quota

Image: Revenue Quota page

This example illustrates the fields and controls on the Revenue Quota page.



Revenue quotas specify how much revenue the sales user must generate for the division or the overall enterprise.

Revenue Quota Type

Select the type of quota to use for the sales user's revenue quota. Values are:

Manager Quota: The manager's own quota.

	Rollup Quota: The sum of quotas for all sales representatives who report to the manager. Quota information is used in pipeline as well as in forecasting.
Time Frame	Select the time frame in which the sales user must meet the revenue quota.
Category	Select the forecast category, either *Revenue Forecast* or *Shadow Forecast,* for calculating the quota.
Detail By	Displays the criteria used to define the quotas, if the time frame has been established to define detail quotas. For example, if you established the time frame to define detail quotas by revenue type, then *Revenue Type* appears here, and you can enter the quotas by time frame period and revenue type.

Unit Quota Page

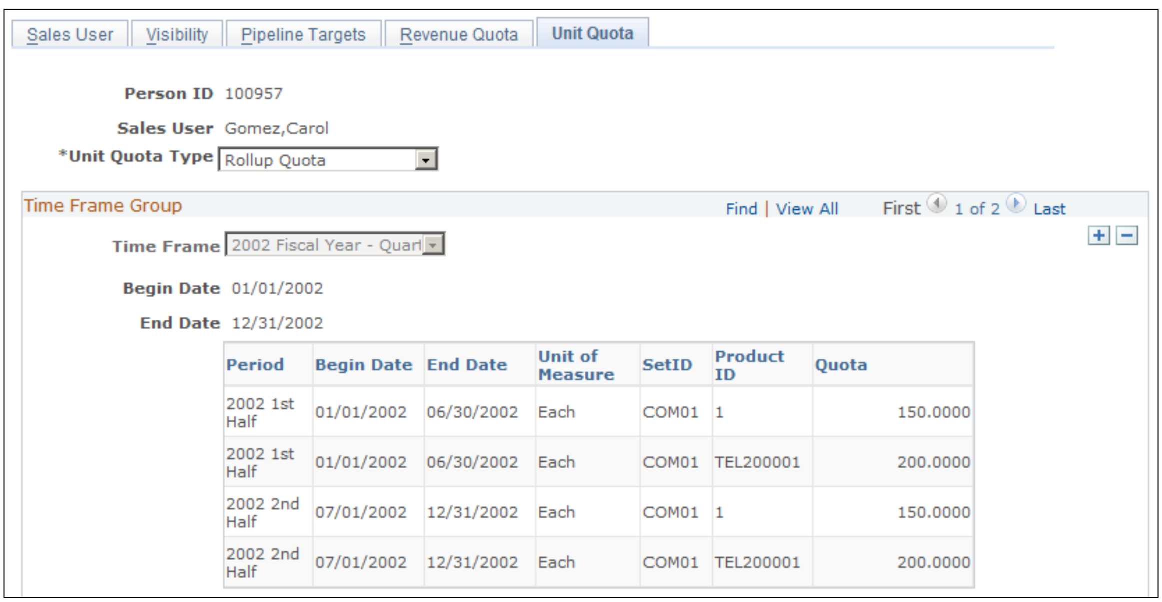
Use the Unit Quota page (RSF_SUSER_QU) to define a sales user's product unit quotas.

Navigation

Set Up CRM > Product Related > Sales > Security and Personalization > Sales Users > Unit Quota

Image: Unit Quota page (1 of 2)

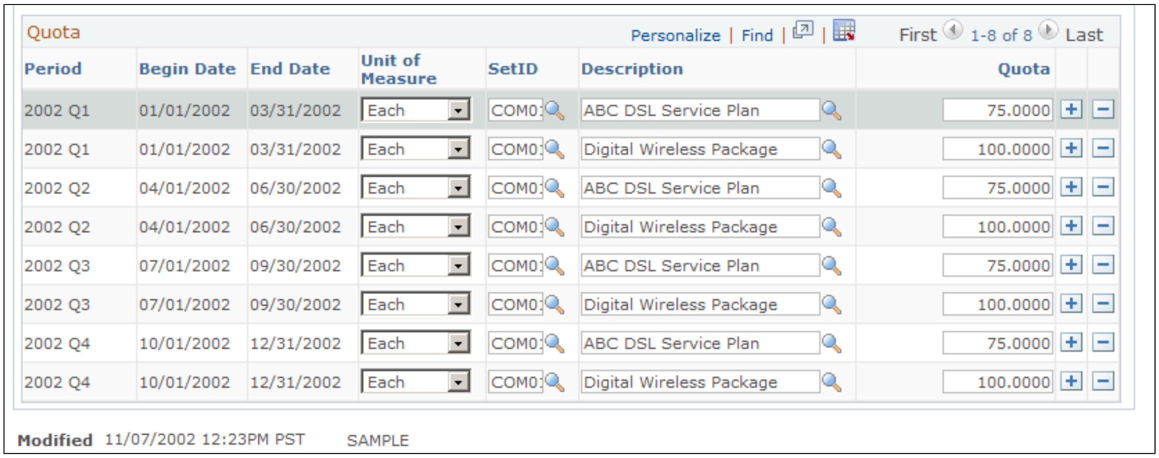
This example illustrates the fields and controls on the Unit Quota page (1 of 2).



Period	Begin Date	End Date	Unit of Measure	SetID	Product ID	Quota
2002 1st Half	01/01/2002	06/30/2002	Each	COM01	1	150.0000
2002 1st Half	01/01/2002	06/30/2002	Each	COM01	TEL200001	200.0000
2002 2nd Half	07/01/2002	12/31/2002	Each	COM01	1	150.0000
2002 2nd Half	07/01/2002	12/31/2002	Each	COM01	TEL200001	200.0000

Image: Unit Quota page (2 of 2)

This example illustrates the fields and controls on the Unit Quota page (2 of 2).



Unit quotas specify how many products the sales user must sell.

Unit Quota Type	Select the type of quota to use for the sales user's unit quota. Values are: *Manager Quota:* The manager's own quota. *Rollup Quota:* The sum of quotas for all sales representatives who report to the manager. Quota information is used in pipeline as well as in forecasting.
Time Frame	Select the time frame in which the sales user must meet the unit quota.

Setting Up Sales Teams

To set up sales teams, use the Sales Team (RSF_TEAM) and Account Team Options components.

This section provides an overview of team types and discusses how to set up sales teams.

Page Used to Set Up Sales Teams

Page Name	***Definition Name***	***Usage***
Setting Up Sales Teams	RSF_TEAM	Set up sales teams.

Understanding Team Types

In PeopleSoft Sales, there are four types of teams: sales teams, territory teams, account teams, and lead or opportunity teams:

- The sales team, which you create here, is the group of sales users who typically work together and can be assigned to a specific lead or opportunity, as a whole team or individually.
- The territory team is the group of sales users who are assigned to the same territory on the territory tree.
- The account team is the group of sales users who are assigned responsibility for specific customer accounts.
- The lead or opportunity team is assigned to a specific lead or opportunity.

  This team can consist of any combination of members of the territory teams, sales teams, and account teams.

Sales Team Page

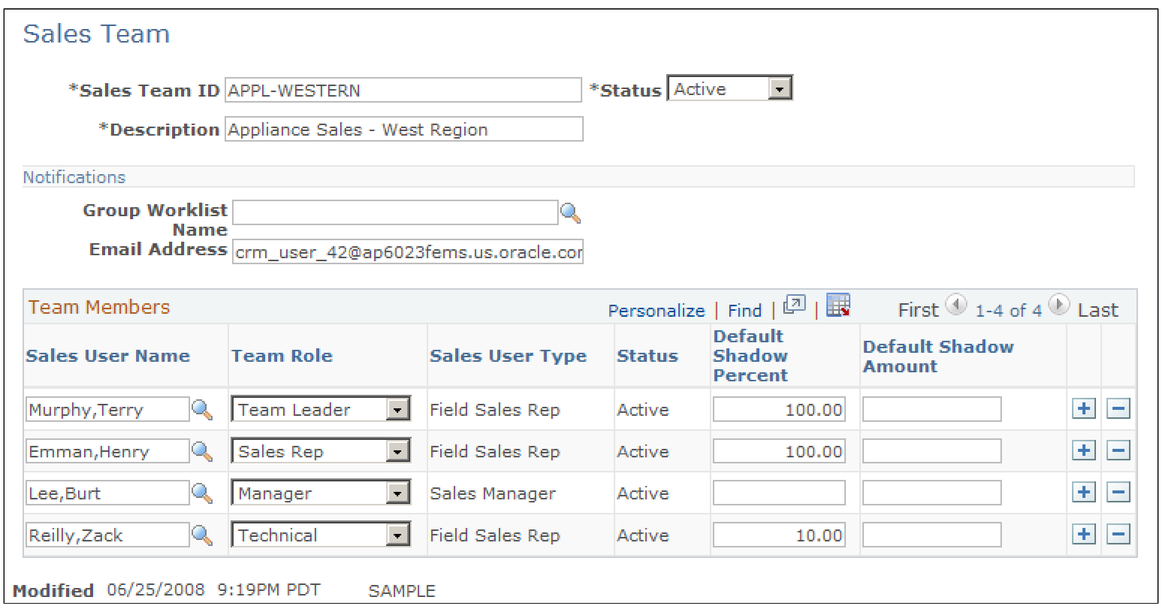
Use the Sales Team page (RSF_TEAM) to set up sales teams.

Navigation

Set Up CRM > Product Related > Sales > Security and Personalization > Sales Team

Image: Sales Team page

This example illustrates the fields and controls on the Sales Team page.



On the Sales Team page, you can select existing sales teams and sales team members to assign sales users to the lead or opportunity. After you add a sales team here, you can remove individuals from the lead or opportunity without removing them from the sales team.

Sales Team ID	Enter an ID for the sales team. This ID should be unique and easily recognizable. Often, it is useful to include the name of the team manager and the business unit.

Notifications

Group Worklist Name	Enter the worklist that is relevant to the sales team that you are creating. Notifications that are triggered by workflow are sent to the worklists that are specified on the workflow event.
Email Address	Enter the email address to which email messages for the team are sent.

Team Members

Sales User Name and **Sales User Type**	Enter the name of the sales user to assign to the sales team. When you do so, the system displays the type of sales user from the individual's Sales User page. See Sales User Page.
Team Role	Select the individual's role on the sales team. Values include *Consultant, Legal, Manager,* and *Field Rep.* See Sales User Page.
Default Shadow Percent and **Default Shadow Amount**	Displays the individual's default shadow percentage and default shadow amount from the Sales User page. See Sales User Page.

Setting Up Functional Options

PeopleSoft Sales uses the PeopleSoft CRM application security framework to control functional access to particular fields, sections, and actions within the Lead and Opportunity components. Functional options define the functions that can be carried out by members of a membership list, such as sales representatives or sales managers. Functional options are grouped into functional option groups that are similar to sales access profiles. You associate a functional option group with a membership list that contains a list of PeopleTools roles. This creates a security profile. Unlike sales access profiles, functional option groups are associated with one or more PeopleTools roles. Sales access profiles are assigned to individual people.

You can set up functional options, functional option groups, membership lists, and security profiles in PeopleSoft CRM application security.

See "Defining Application Security" (PeopleSoft CRM 9.2: Application Fundamentals).

Some of the functional options for PeopleSoft Sales are linked to fields or sections in the Lead and Opportunity components. Display templates determine how the system displays the fields and sections.

See "Configuring Display Templates for Components" (PeopleSoft CRM 9.2: Automation and Configuration Tools).

This table lists the functional options that are available for PeopleSoft Sales:

Functional Option	***Default and Revoked Settings***
CORE_RSF_ADVANCED	Default setting: When the user enters a lead or opportunity, the system shows all the fields, sections, and tabs that are marked as controlled by display template security. Revoked setting: When the user enters a lead or opportunity, the system hides the fields, sections, and tabs that are marked as controlled by display template security. If you use this setting and the delivered display templates for leads and opportunities, the system displays the basic fields necessary for entering leads and opportunities. You can set up display template security in the Display Template Details component. See Setting Up Display Templates for Leads and Opportunities.
CORE_RSF_AUTO_ASSIGN_OFF	Default setting: When the user saves a lead or opportunity, the system does not automatically assign a sales representative to the lead or opportunity. Revoked setting: When the user saves a lead or opportunity, the system automatically assigns a sales representative to the lead or opportunity by using assignment criteria.
CORE_RSF_DEFAULT_OWNER	Default setting: When a user creates a new lead or opportunity, the system adds the user who creates the lead or opportunity to the Sales Team Member section as the primary sales representative. Revoked setting: When a user creates a new lead or opportunity, the system does not add a sales representative to the Sales Team Member section.
CORE_RSF_FCAST_ROLLUP	Default setting: The default value for the Forecast View field on the Forecast page in the Search Forecasts component is *Manager Review*. This is the view that sales managers use to roll up and analyze forecasts. Revoked setting: The default value for the field is *Subtotals*. This reduces load time and may be preferable for second-level and higher-level managers. See Managing Forecasts.
CORE_RSF_FCAST_SIMPLE	Default setting: The user has access to all views on the Forecast page in the Search Forecasts component. Revoked setting: The user has access to only the following views on the Forecast page in the Search Forecasts component: Combined Forecasts, Manager Review, and Subtotals.
CORE_RSF_SEARCH_PRODUCT_GROUP	Default setting: The system displays the product group search option in the Lead and Opportunity components. Revoked setting: The system does not display the product group search option in the Lead and Opportunity components.

Functional Option	***Default and Revoked Settings***
CORE_RSF_SHOW_SITE	Default setting: The system displays the site field and search on the Discover page of the Lead and Opportunity components. Revoked setting: The system does not display the site field and search on the Discover page of the Lead and Opportunity components.
CORE_RSF_SUMMARY	Default setting: The system displays the summary page in the Lead and Opportunity components. Revoked setting: The system does not display the summary page in the Lead and Opportunity components.

Chapter 5

Setting Up Sales Leads and Opportunities

Setting Up a Sales Process

To set up a sales process, use the Sales Process (RSF_SALES_MODEL) component.

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

- Define a process.
- Clone a process.

Pages Used to Set Up a Sales Process

Page Name	***Definition Name***	***Usage***
Sales Process Page	RSF_SALES_MODEL	Review the KES stages and tasks that make up the sales process delivered with the PeopleSoft system. Define other stages or tasks as necessary.
Clone Sales Process Page	RSF_SLSPRCS_CLONE	Copy an existing sales process to use as the basis for a new process.

Understanding the Sales Process

Sales efforts typically follow a defined series of stages and tasks. PeopleSoft Sales provides the Knowledge Enabled Sales (KES) process, a ready-to-use proprietary sales process that enables you to identify the stages and tasks that an organization's sales process requires. The KES process can also help sales representatives learn how to perform tasks using the organization's best practices.

The KES process includes several stages. Each stage is associated with an opportunity pipeline segment, and every stage includes one or more tasks. You can use the KES process that is provided or you can define sales stages and tasks based on your organization's preferred sales model.

Note that you can enable multiple sales processes at one time. For example, you might have one process for selling within a particular industry and another for selling a particular product or service line. You can relate all the various stages to common pipeline segments to ensure that you analyze pipeline information correctly.

This table lists the KES stages and their tasks. You can modify these stages and tasks to meet your business needs.

Note: The weights included in this table are provided as an example of how the KES process works.

Stage	***Weight***	***Purpose***	***Task***
Discover	10	Identify and review knowledge about the customer, industry, and competitors before making the initial sales call in the Qualify stage.	Complete these tasks during the Discover stage: 1. Review lead information. 2. Review opportunity information. 3. Review customer information. 4. Review customer contacts. 5. Review industry briefing. 6. Review customer briefing. 7. Perform customer research to identify recent news releases or financial statements that are pertinent to the customer. 8. Review competitor briefing.

Stage	*Weight*	*Purpose*	*Task*
Qualify	20	• Align the customer's buying process with the sales process based on information obtained during the initial sales call. • Identify the customer's needs. • Identify the decision makers, influences, and competitive landscape.	Complete these tasks during the Qualify stage: 1. Plan initial sales call. 2. Conduct initial sales call. 3. Update opportunity information. 4. Update customer information. 5. Assemble customer's buying team. 6. Assemble sales team. 7. Follow up on initial sales call. 8. Update competitor information. 9. Document customer's needs. 10. Create opportunity plan (needs analysis, product research, follow-up calls, and so on) and assign tasks to move the opportunity to the Develop Solution stage.
Develop Solution	20	Define a set of products or services to meet the customer's needs and preferences, and obtain a quote for these products or services.	Complete these tasks during the Develop Solution stage: 1. Define solution. 2. Configure and quote solution. 3. Review solution with sales team. 4. Review solution with customer. 5. Finalize solution based on feedback from sales team and customer.

Stage	***Weight***	***Purpose***	***Task***
Develop Proposal	20	Create a comprehensive written proposal that identifies how the proposed solution addresses the customer's needs. The proposal includes the quote itself, product descriptions, support policies, and legal information such as warranties.	Complete these tasks during the Develop Proposal stage: 1. Update opportunity information. 2. Generate proposal based on the quoted solution. 3. Redefine proposal, if necessary. 4. Review proposal with sales team. 5. Refine and finalize proposal based on feedback from sales team. 6. Submit written proposal to customer and update the status.
Negotiate and Close	20	Discuss the written proposal with the customer and negotiate terms and conditions to win the business.	Complete these tasks during the Negotiate and Close stage: 1. Review negotiation strategies in preparation for meeting with the customer. 2. Conduct negotiation meeting to win the business. 3. Complete legal contracts. 4. Summarize the opportunity outcome, update the status, and identify why the opportunity was won or lost.

Stage	*Weight*	*Purpose*	*Task*
Retain	10	Prepare a plan to manage the customer relationship after closing the opportunity.	Complete these tasks during the Retain stage: 1. Update solution based on opportunity outcome. 2. Update customer information, including new contacts for implementation and ongoing customer relationship. 3. Prepare relationship plan. 4. Conduct relationship meeting to discuss relationship plan.

Sales Process Page

Use the Sales Process page (RSF_SALES_MODEL) to review the KES stages and tasks that make up the sales process delivered with the PeopleSoft system.

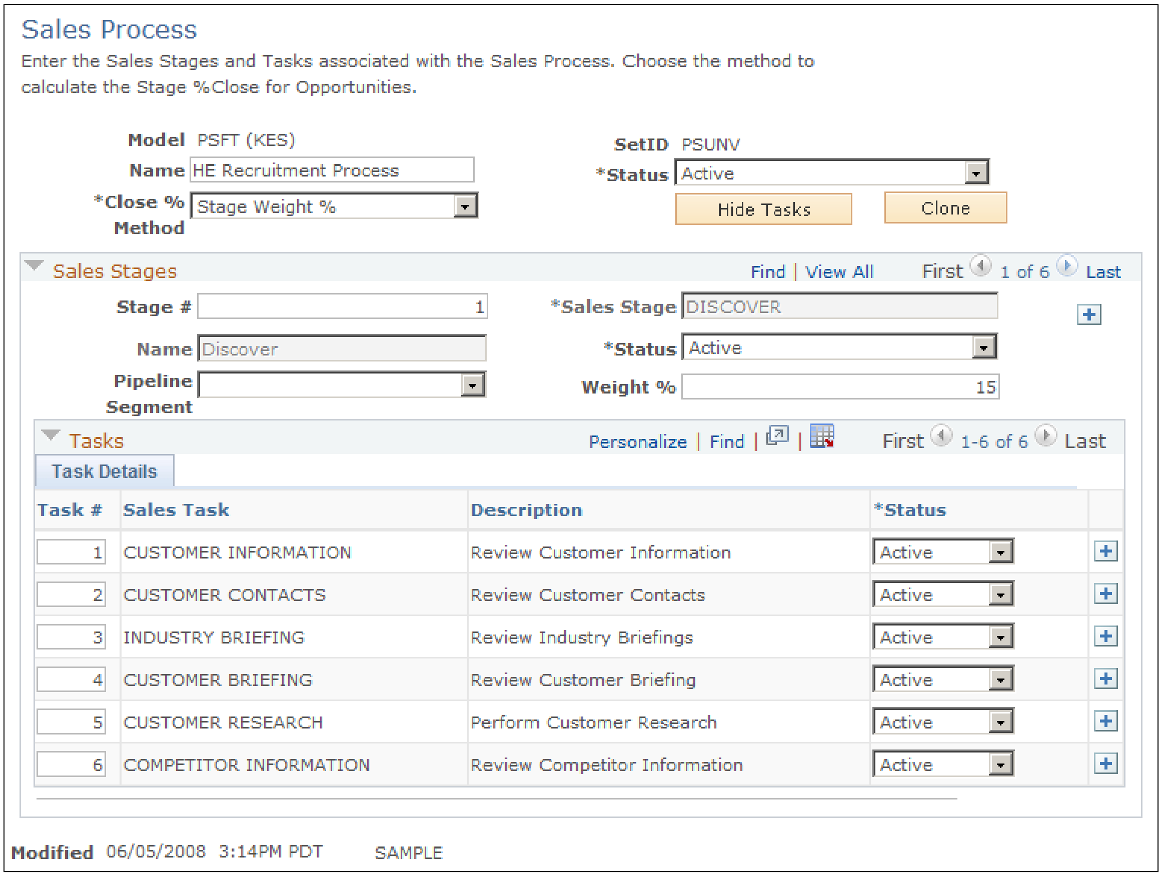
Define other stages or tasks as necessary.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Sales Process > Sales Process

Image: Sales Process page

This example illustrates the fields and controls on the Sales Process page.



Model and **Name**	Displays *PSFT (KES)* and *Knowledge Enabled Sales* as the default values if you use the KES process. If you use a different sales process, the process and name appear. You can edit the name on this page.
Close % Method (close percentage method)close % method	Select a method for evaluating the progress of opportunities; 100 percent equals closed or completed. Values are:

- *Stage Weight %:* Expresses progress as a percentage of the weighted stages that are completed.

  For example, suppose that your sales model consists of three stages and you assign a weight of 50 percent to the first stage and 25 percent each to the second and third stages. When you complete the first two stages, the system calculates that you have completed 75 percent of the sales model.

- *Stage Level:* Expresses progress as a simple percentage of the stages completed.

  For example, suppose that your sales model consists of four stages. When you complete the first two stages, the system calculates that you have completed 50 percent of the sales model.

- *Task Type:* Expresses progress as a simple percentage of tasks completed.

  For example, suppose that your sales model consists of eight tasks. When you complete the first six tasks, the system calculates that you have completed 75 percent of the sales model.

- *Not Used:* No methods are used to evaluate the progress of opportunities.

Hide Tasks and **Show Tasks**	Click to hide or display tasks. If you use tasks associated with your sales process, display them. Otherwise, hide the tasks that appear here.
Clone	Click to access the Clone Sales Process page, where you can copy or clone the sales process to a different setID. You can clone the stages and tasks of the process.

Sales Stages

Stage # (stage number) and **Sales Stage**	Displays the sequence number and stage of the process, and lists the associated tasks at the bottom of the page. Click the Add button to create additional stages of the process and associate tasks with them. The system enters the stage sequence number. You can override the sequence numbers to reorder the stages.
Pipeline Segment	Identify the pipeline segment to associate with the stage. In the KES process, pipeline segments include *Contact, Develop, Negotiate, Qualify,* and *Retain.* You must specify a pipeline segment to correlate with the stage if you set up pipeline targets for a sales user's pipeline segment quotas on the Sales User page. See Pipeline Targets Page.
Weight % (weight percentage)	Enter the weight percentage that represents that stage's portion of the sales model. For example, if a stage represents half of the sales model, half of the work, half of the time, half of the important landmarks, or half of some other measure, then enter *50* (percent).

Tasks

Task # (task number) and **Sales Task**	Displays the sequence number and name of the discrete activity that runs as part of a sales stage.

The system enters the sequence number when you add a task. You can override sequence numbers to reorder the tasks.

Clone Sales Process Page

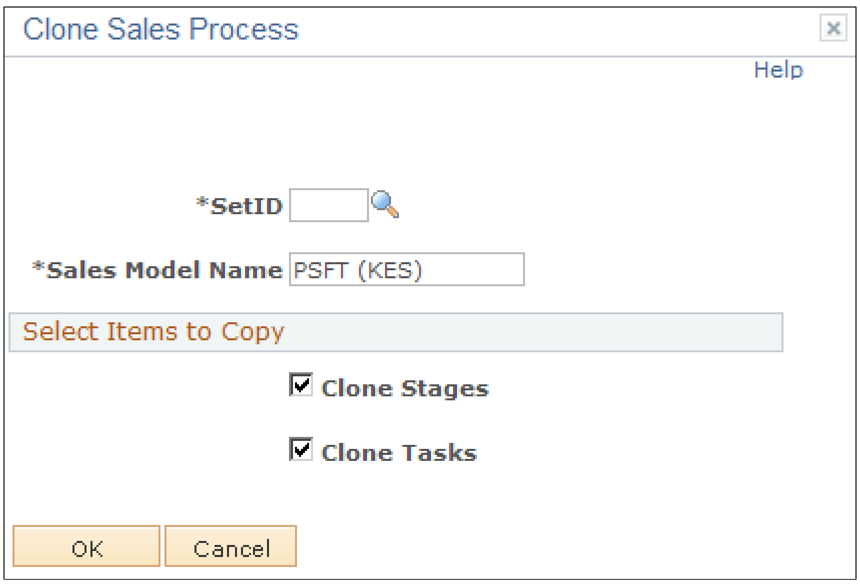
Use the Clone Sales Process page (RSF_SLSPRCS_CLONE) to copy an existing sales process to use as the basis for a new process.

Navigation

Click the Clone button on the Sales Process page.

Image: Clone Sales Process page

This example illustrates the fields and controls on the Clone Sales Process page.



You can copy (or *clone*) an existing process with its stages and tasks and then make adjustments to create a new process.

Setting Up Component Field Default Values

This section provides an overview of field default values for leads and opportunities and discusses how to set up default values for component fields.

Page Used to Set Up Component Field Default Values

Page Name	***Definition Name***	***Usage***
Component Field Default Page	RB_COMP_FLD_DFLT	Set up default values to populate required fields if users do not enter values in them.

Understanding Field Default Values for Leads and Opportunities

When a sales user creates a lead or opportunity, the lead or opportunity description is a required field. The user can enter a description to identify the lead or opportunity. However, if the user does not enter a description and saves the lead or opportunity, the system saves a default value for the description based on a combination of fields set up on the Component Field Default page.

PeopleSoft Sales delivers two default settings for component fields—one for the lead description and one for the opportunity description. These settings specify that the system populates the lead and opportunity descriptions with the name of the customer if the sales user does not enter a description. You can change these default settings by using the Component Field Default page.

Component Field Default Page

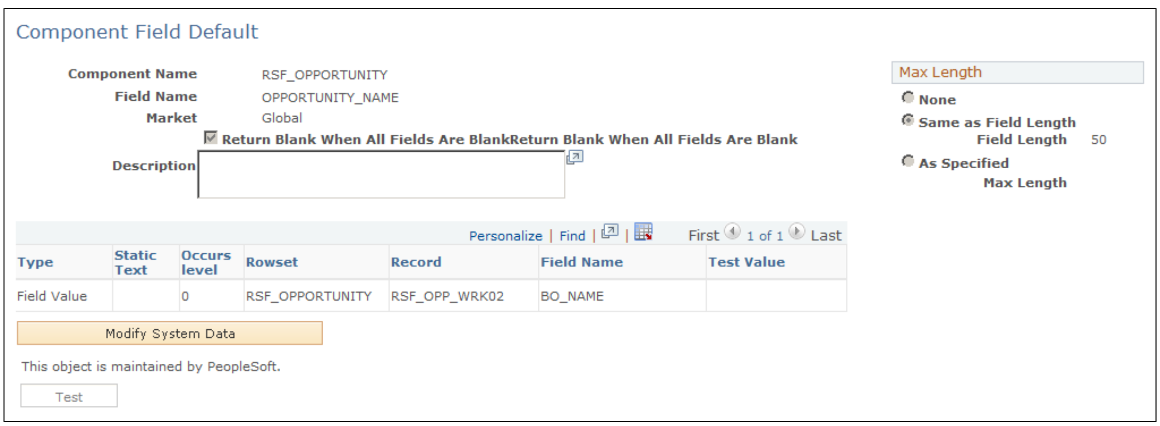
Use the Component Field Default page (RB_COMP_FLD_DFLT) to set up default values to populate required fields if users do not enter values in them.

Navigation

Set Up CRM > Common Definitions > Component Configuration > Component Field Default > Component Field Default

Image: Component Field Default page

This example illustrates the fields and controls on the Component Field Default page.



Select *RSF_LEAD_ENTRY* and *DESCR50* for the component name and field name, respectively, to modify the settings for the lead description. Select *RSF_OPPORTUNITY* and *OPPORTUNITY_NAME* to modify the settings for the opportunity description.

Click the Modify System Data button to edit the fields on the Component Field Default page.

If you enter multiple rows, the system concatenates the values from the rows to form the default value.

Return Blank When All Fields Are Blank	Select this check box to have the system leave the field blank when all the fields in the criteria grid are blank for the transaction.
Max Length (maximum length)	Select a value for the maximum character length of the default value. Values are *None, Same as Field Length,* and *As*

	Specified. If you select *As Specified,* enter a value in the Max Length field.
Type	Values are *Field Value, Blank Space,* and *Static Text.* If you select *Field Value,* you must enter the rowset, record, and field name.
Occurs level	Enter the level at which the field is located.
Rowset	Enter the name of the rowset that contains the field.
Record	Select the record that contains the field name that you use to populate the Description field.
Field Name	Select the field name that you use to populate the Description field.
Test Value	If you select *Field Value* for the type, enter a typical value in this field for testing purposes. Click the Test button to view a potential name. The system retrieves the actual value based on the field during live input.
Test	Click this button to display the projected lead or opportunity default value, which appears to the right of the button. If you have multiple rows, the system concatenates the values from the rows.

Setting Up Lead Ratings

To set up lead ratings, use the Lead Ratings (RSF_LEAD_RATING) and Lead Rating by Rate Set Value (RT_RS_TO_LEAD_RATE) components.

This section provides an overview of ratings and rating rules and discusses how to:

- Define lead ratings and set workflow triggers.
- Set up lead rating rules.
- Build conditions for rating rules.
- Choose conditions to evaluate.
- Map survey values to lead ratings.

Pages Used to Set Up Lead Ratings

Page Name	***Definition Name***	***Usage***
Lead Ratings Page	RSF_LEAD_RATING	Define ratings, also called *temperatures*, that identify the potential of a lead for becoming a sale, and set parameters for triggering workflow. The system sends notifications when a lead or opportunity is not accepted or rejected within a specified time period. Lead ratings are keyed by setID.
Rating Rules Page	RSF_RATING_RULES	Set up the conditions for assigning a rating to a lead. Lead rating rules are associated to a setID.
Lead Rating Rules - Edit Rules Page	RSF_CND_BLD_PG	Build rating rules.
Edit Condition Page	RSF_SALE_TERM_PG	Choose a condition to evaluate in the rating rule.
Rate Set Value to Lead Rating Page	RT_RS_TO_LEAD_RATE	Map branch script rate-set values to lead ratings.

Understanding Ratings and Rating Rules

Lead ratings assess the probability that a customer will buy and are usually represented by a term that describes temperature, such as *Hot, Warm,* or *Cold.*

For leads that are automatically generated from marketing campaigns, you can automatically generate an initial lead rating from the information gathered by marketing: customer name, potential revenue, geographic region, and so forth. You select relevant information and set up rules that automatically evaluate leads that are generated from marketing campaigns. Rating rules, like ratings, are unique for a setID and are built using the Active Analytics Framework (AAF) in the context of lead management.

Related Links

"Understanding AAF" (PeopleSoft CRM 9.2: Automation and Configuration Tools)

Lead Ratings Page

Use the Lead Ratings page (RSF_LEAD_RATING) to define ratings, also called temperatures, that identify the potential of a lead for becoming a sale, and set parameters for triggering workflow.

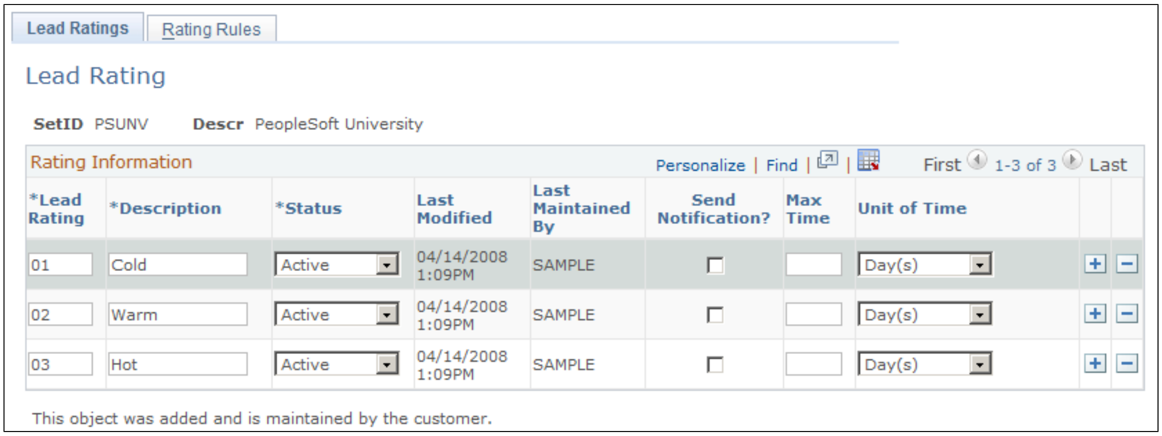
The system sends notifications when a lead or opportunity is not accepted or rejected within a specified time period. Lead ratings are keyed by setID.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Lead Ratings > Lead Ratings

Image: Lead Ratings page

This example illustrates the fields and controls on the Lead Ratings page.



Send Notification	Select to send an email notification to the worklist explaining that the lead or opportunity with the specified rating has not been accepted or rejected within the allowable time.
Max Time (maximum time) and **Unit of Time**	Specify the maximum delay period—expressed in days, hours, or minutes—by which a lead with that rating must either be accepted or rejected. If the lead is not accepted or rejected within that time, then the defined workflow is triggered.

Rating Rules Page

Use the Rating Rules page (RSF_RATING_RULES) to set up the conditions for assigning a rating to a lead.

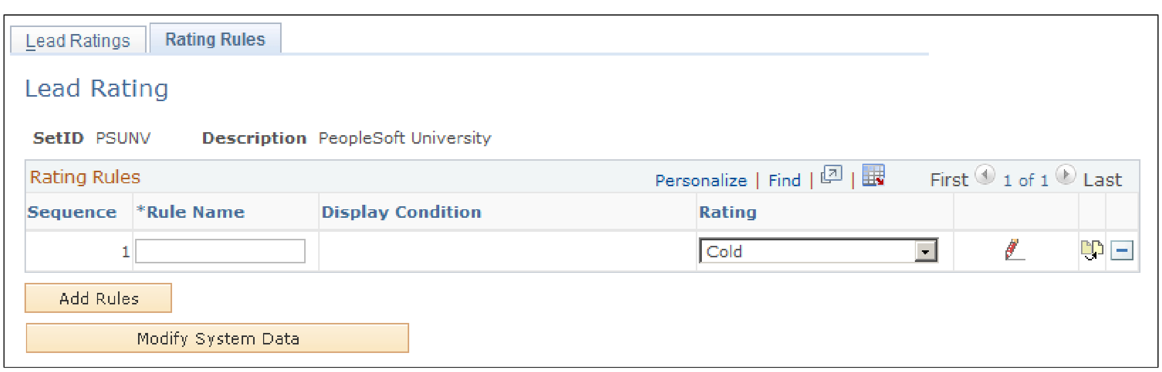
Lead rating rules are associated to a setID.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Lead Ratings > Rating Rules

Image: Rating Rules page

This example illustrates the fields and controls on the Rating Rules page.



A lead rating rule is a condition and a rating that the lead received if the condition is met. Lead rating rules are associated with a setID.

Rule Name	Enter a free-form text name for the rule.
Display Condition	Displays the rule for assigning the rating to the lead.
Rating	Displays the ratings that you set up on the Lead Ratings page.

Lead Rating Rules - Edit Rules Page

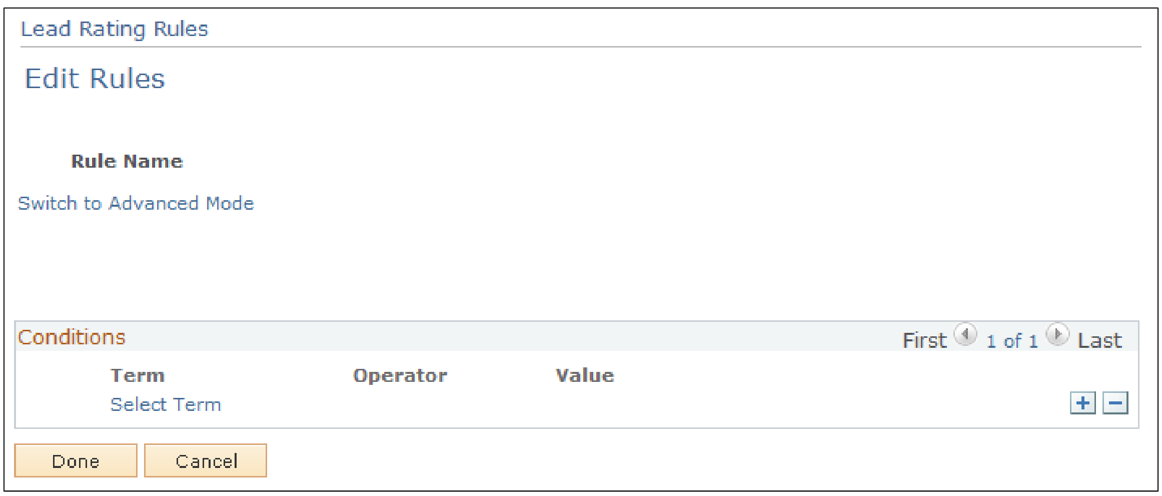
Use the Lead Rating Rules - Edit Rules page (RSF_CND_BLD_PG) to build rating rules.

Navigation

Click the Add Rule button or the button on the Rating Rules page.

Image: Lead Rating Rules - Edit Rules page

This example illustrates the fields and controls on the Lead Rating Rules - Edit Rules page.



This page enables you to build the condition for a rule. On initial entry to the page, or when you add a term to the condition, the Select Term link appears. After you add a term to the condition, you select an operator from the available values and enter a value to build the condition.

Edit Condition Page

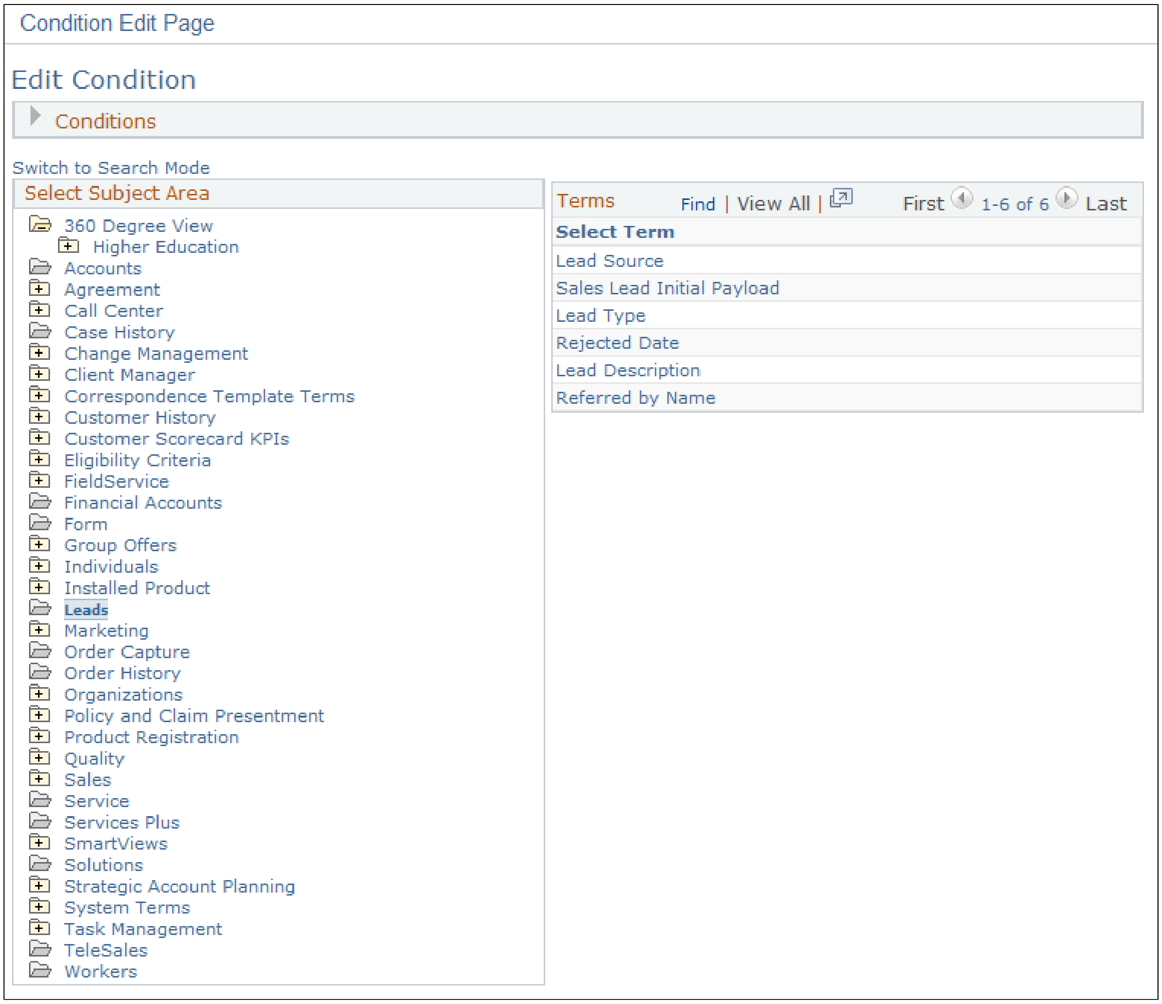
Use the Edit Condition page (RSF_SALE_TERM_PG) to choose a condition to evaluate in the rating rule.

Navigation

Click the Select Term link on the Lead Rating Rules - Edit Rules page.

Image: Edit Condition page

This example illustrates the fields and controls on the Edit Condition page.



This page enables you to select a term that is evaluated as part of a rule. Only conditions that are applicable in the context of lead management appear on this page.

Rate Set Value to Lead Rating Page

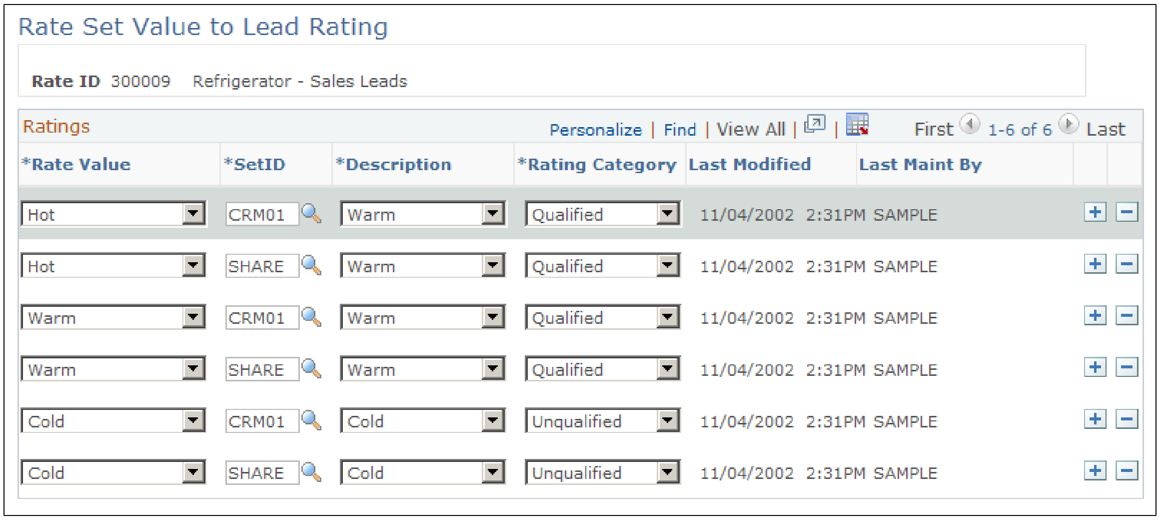
Use the Rate Set Value to Lead Rating page (RT_RS_TO_LEAD_RATE) to map branch script rate-set values to lead ratings.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Lead Rating by Rate Set Value > Rate Set Value to Lead Rating

Image: Rate Set Value to Lead Rating page

This example illustrates the fields and controls on the Rate Set Value to Lead Rating page.



When a marketing group creates a branch script survey, it defines rate-set values so that the script can translate the overall score into a meaningful rating. You can map those rate-set values to lead ratings here. That way, if the survey score returns the equivalent of a lead rating with the rating category of *Qualified,* the marketing group can forward the prospect to the sales group as a qualified lead.

Setting Up Assignment Weights

To set up assignment weights, use the Assignment Weights (RSF_ASSIGN_W_TBL) component.

This topic discusses how to define assignment weights.

Page Used to Set Up Assignment Weights

Page Name	*Definition Name*	*Usage*
Assignment Weights Page	RSF_ASSIGN_W_TBL	Define assignment weights to identify the importance of the criteria that the system uses to determine the assignment of a lead or opportunity to a territory.

Assignment Weights Page

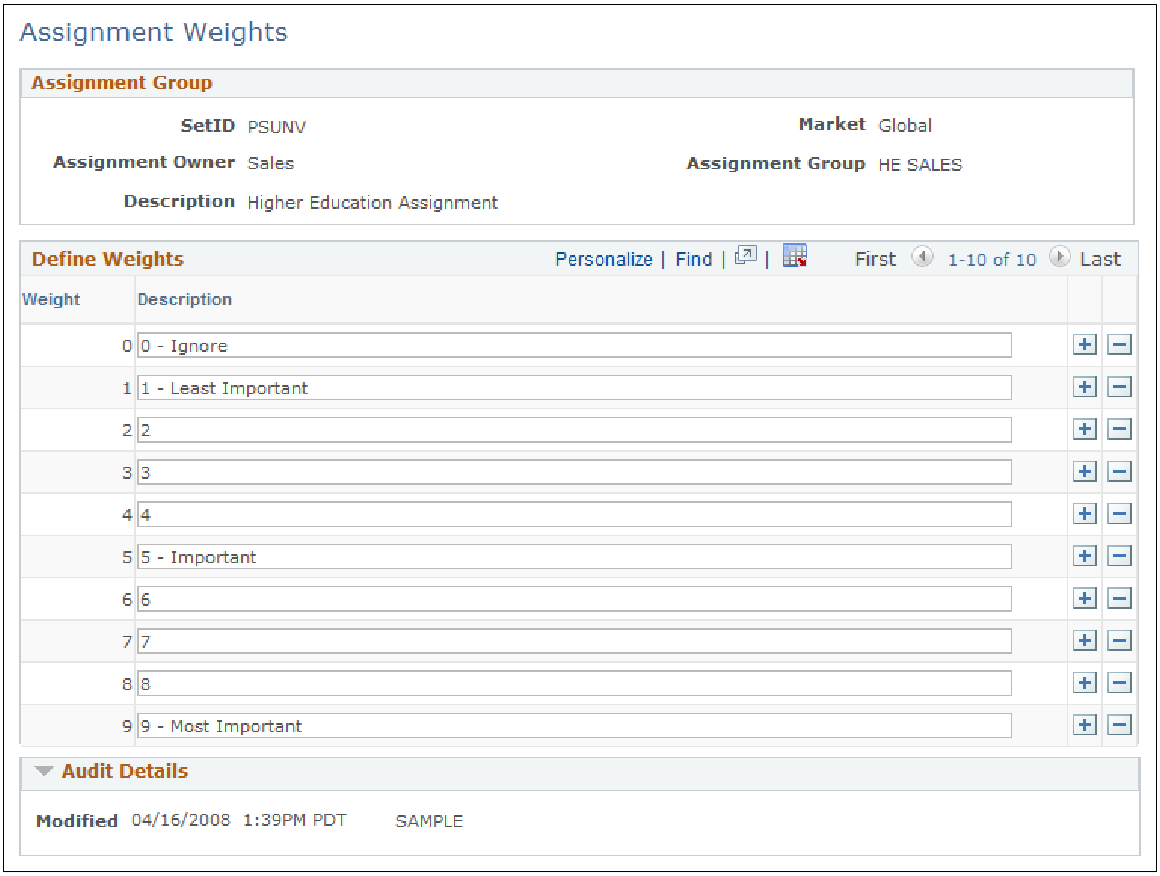
Use the Assignment Weights page (RSF_ASSIGN_W_TBL) to define assignment weights to identify the importance of the criteria that the system uses to determine the assignment of a lead or opportunity to a territory.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Assignment Weights > Assignment Weights

Image: Assignment Weights page

This example illustrates the fields and controls on the Assignment Weights page.



Predefined assignment weights are delivered with the following anchor weights. You can use or modify these, and you can define different sets for different combinations of setIDs and assignment groups:

- *0* is ignore.
- *5* is important.
- *9* is most important.

Assignment weights are used, along with other criteria, when the system assigns leads and opportunities.

Related Links

Criteria Page

Setting Up Account-Based Assignment Options

To define account auto-assignment options for leads and opportunities, use the Account Auto-assignment Options for Lead and Opportunity component.

Use the RSF_ASGN_OPTIONS component interface to load data into the tables for this component.

This section provides an overview of lead and opportunity assignment by customer account and discusses how to set up account-based assignment options.

Page Used to Set Up Account-Based Assignment Options

Page Name	***Definition Name***	***Usage***
Assignment Options Page	ASSIGNMENT_OPTIONS	Enable the automatic assignment of sales representatives to leads and opportunities by customer account.

Understanding Lead and Opportunity Assignment by Customer Account

In addition to using the assignment engine for automatic territory-based assignment, PeopleSoft Sales can also be set up to support the automatic assignment of sales representatives to leads and opportunities based on associated customer accounts. This feature enables customer account team members, who are established as sales users, to be assigned to leads and opportunities as sales representatives. These team members do not have to be associated with territories to be considered in the assignment of sales representatives to work on leads and opportunities.

Separate configuration options are provided for enabling customer account-based assignment on leads and on opportunities. You can also set up the system to assign either all account team members or just the owners of the account team (who are also sales users) as sales representatives. If the customer account-based assignment option is enabled, it takes precedence over the territory-based mechanism when automatic lead and opportunity assignment occurs.

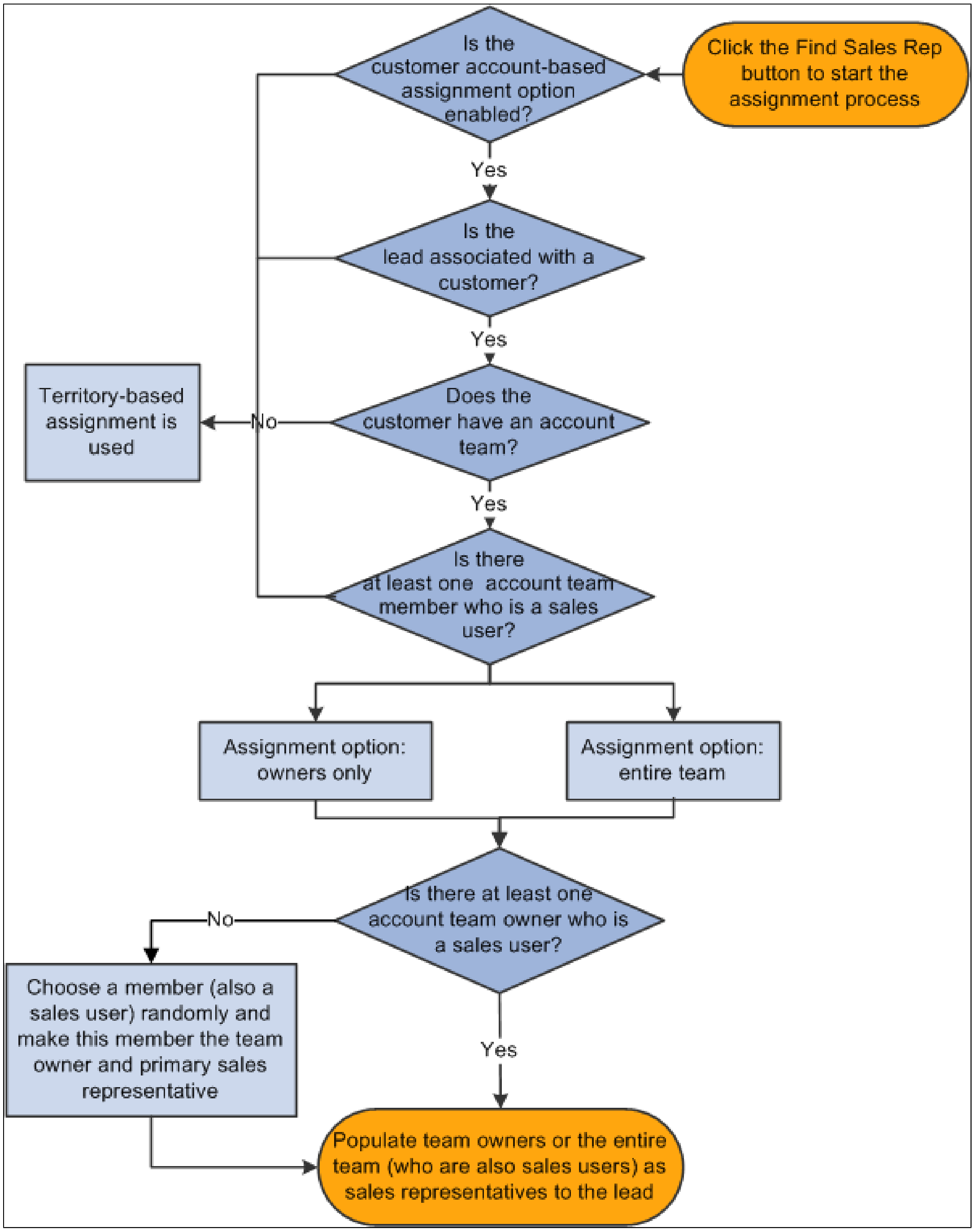
See Understanding Sales Representative Assignment.

Customer Account-Based Assignment: Process Flow

This diagram illustrates the process for assigning sales representatives to leads based on the account teams that are associated with leads' customers:

Image: Process flow for assigning sales representatives to leads and opportunities based on the account team that is associated with customers of leads and opportunities

This diagram illustrates the process for assigning sales representatives to leads based on the account teams that are associated with leads' customers.



This process applies to both leads and opportunities; leads are used in this example to explain the process. Here is how the process works:

1. An automatic sales representative assignment request is made.

   An example is when a user clicks the Find Sales Rep button on the Assign page of a lead, which invokes the assignment engine.

2. After confirming that the account-based assignment is set to be enabled for leads, the system checks if a customer is present in the lead.
   - If yes, the system checks to see if the customer is associated with an account team.
   - If no, territory-based assignment is used.
3. If the customer has an account team, the system further checks if the account team has at least one sales user.

   If the customer does not have an account team, or none of the account team members are sales users, territory-based assignment is used.
4. Based on the selected assignment criterion (the entire account team or owners only), the assignment engine populates the qualified account team members to the Assign page of the lead. Specifically:
   - If the assignment criterion is the entire account team, the system populates all team members who are also sales users to the lead as sales representatives, and make the account team owner the primary sales representative. If there are multiple team owners, one of them is made primary through random selection.

     If there are no account team owners, or owners are not sales users, the system makes one of the team members the team owner and this owner becomes the primary sales representative.

     Note: It is recommended that you mark one account team member as the owner so that this owner automatically becomes the primary sales representative in customer based-assignment.
   - If the assignment criterion is owners only, account team members who are both sales users and marked as owners will be assigned to the lead as sales representatives.

     Similar to the other assignment criterion, the system makes one of the owners the primary sales representative through random selection. And if no qualified account team owners are available, a random account team member, who is also a sales user, is then selected to become the owner and primary sales representative.

The creator of the lead has a higher priority to be chosen as the primary sales representative if this user is also the owner of the customer's account team.

Assignment Options Page

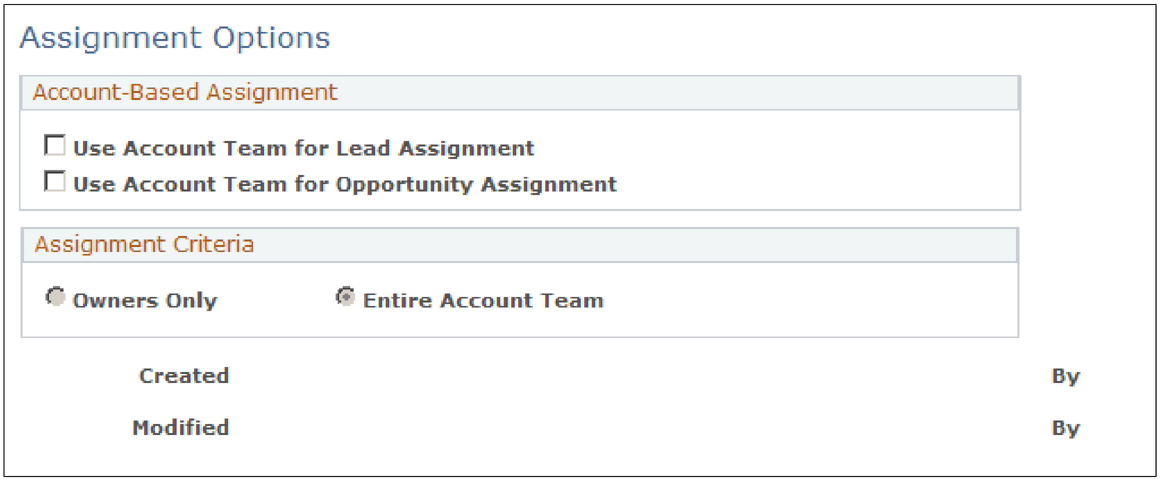
Use the Assignment Options page (ASSIGNMENT_OPTIONS) to enable the automatic assignment of sales representatives to leads and opportunities by customer account.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Assignment Options > Assignment Options

Image: Assignment Options page

This example illustrates the fields and controls on the Assignment Options page.



This functionality is disabled as delivered.

Account-Based Assignment

Use Account Team for Lead Assignment

Select to enable account-based automatic assignment of sales representatives for leads.

Use Account Team for Opportunity Assignment

Select to enable account-based automatic assignment of sales representatives for opportunities.

Assignment Criteria

This section is not available for edit if this assignment is not enabled for the Lead or Opportunity component. The selected criteria applies to all enabled components.

Owners Only

Select for the system to assign only owners of the account team (who are sales users) to the enabled component.

Entire Account Team

Select for the system to assign all members of the account team (who are sales users) to the enabled component.

Setting Up Lead Reject and Turnback Reasons

To set up lead reject and turnback reasons, use the Lead Reject Reasons (RSF_LEAD_RJCT_RSN) component.

This topic discusses how to set up lead reject and turnback reasons.

Page Used to Set Up Lead Reject and Turnback Reasons

Page Name	*Definition Name*	*Usage*
Lead Reject/Turnback Reason Page	RSF_LE_RJCT_RSN	Define reasons, keyed by setID, for sales representatives to use when rejecting or turning back a lead.

Lead Reject/Turnback Reason Page

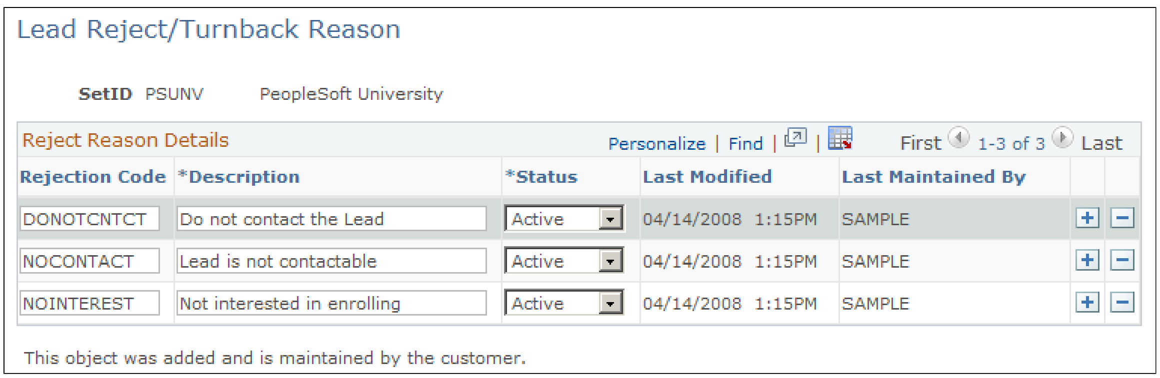
Use the Lead Reject/Turnback Reason page (RSF_LE_RJCT_RSN) to define reasons, keyed by setID, for sales representatives to use when rejecting or turning back a lead.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Lead Reject Reasons > Lead Reject/ Turnback Reason

Image: Lead Reject/Turnback Reason page

This example illustrates the fields and controls on the Lead Reject/Turnback Reason page.



Enter codes and descriptions for rejecting a lead.

To reject or turn back a lead, a sales user must identify a reject or turnback reason on the Lead - Summary page. On the Lead Reject/Turnback Reason page, you define the possible reasons that the sales user can select.

Related Links

Accepting, Rejecting, or Turning Back a Lead Assignment

Setting Up Sales Contacts

To set up sales contacts, use the Sales Contact (RSF_CONT_SETUP) component. To set up contact roles, use the Contact Roles (RSF_ROLE_CD_TBL) component.

This topic discusses how to:

- Set up contact support levels.

- Set up contact impact levels.
- Set up contact titles.
- Set up contact departments.
- Set up contact roles.

Pages Used to Set Up Sales Contacts

Page Name	*Definition Name*	*Usage*
Contact Support Page	RSF_CONT_SUPPORT	Set up support levels for describing contacts.
Contact Impact Page	RSF_CONT_IMPACT	Set up impact levels for describing contacts.
Contact Title Page	RSF_CONT_TITLE	Set up titles for describing contacts.
Contact Department Page	RSF_CONT_DEPART	Set up departments for describing contacts.
Contact Roles Page	RSF_ROLE_CD_TBL	Set up roles for describing contacts.

Contact Support Page

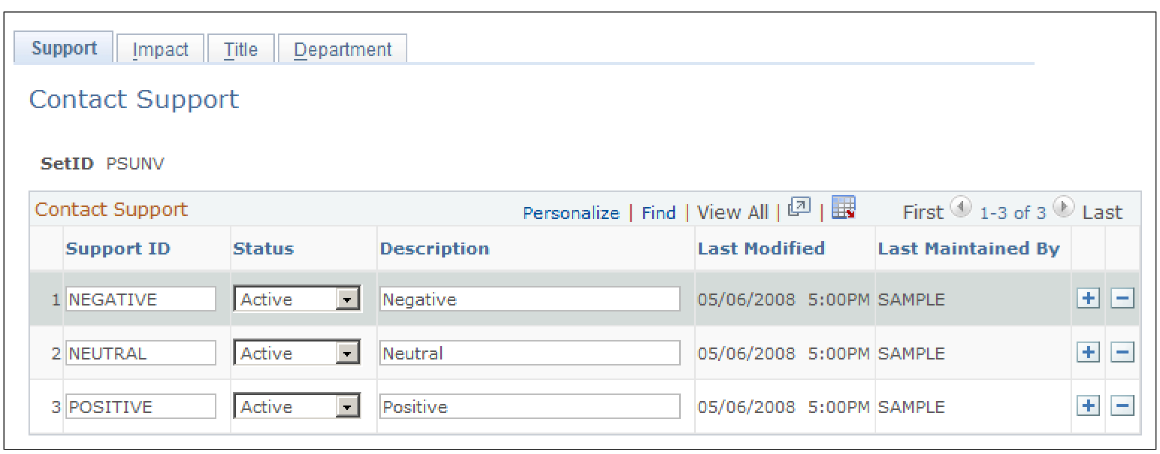
Use the Contact Support page (RSF_CONT_SUPPORT) to set up support levels for describing contacts.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Sales Contacts > Contact Support

Image: Contact Support page

This example illustrates the fields and controls on the Contact Support page.



Create support levels that enable sales users to identify the type of support that a contact shows for moving the sale forward.

Support levels appear on the Impact tab on the Contact grid of the Discover page in the lead and opportunity details components.

Related Links

Selecting Customer Contacts for a Lead or Opportunity

Contact Impact Page

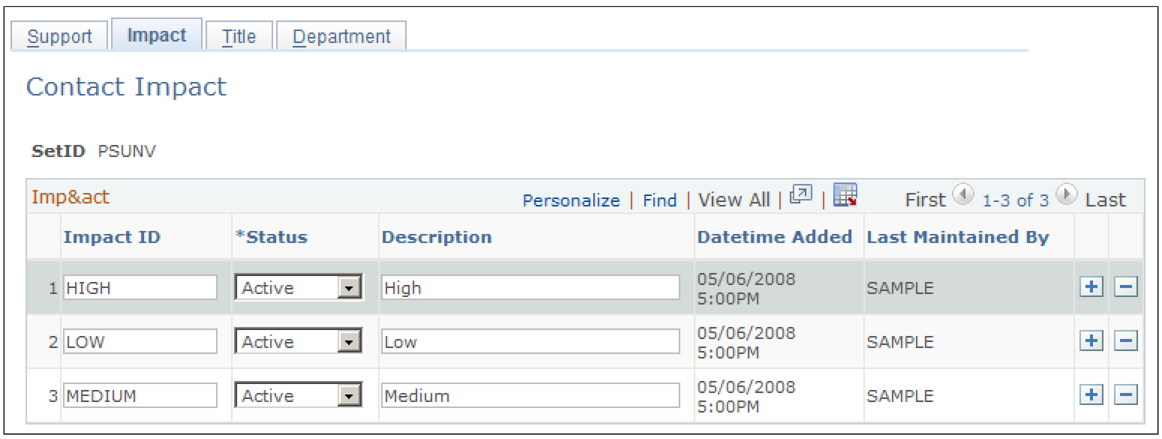
Use the Contact Impact page (RSF_CONT_IMPACT) to set up impact levels for describing contacts.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Sales Contacts > Contact Impact

Image: Contact Impact page

This example illustrates the fields and controls on the Contact Impact page.



Create impact levels that enable sales users to identify the impact that a contact might have on the customer's decision to purchase.

Impact levels appear on the Impact tab in the Contact grid of the Lead - Discover and Opportunity - Discover pages.

Related Links

Selecting Customer Contacts for a Lead or Opportunity

Contact Title Page

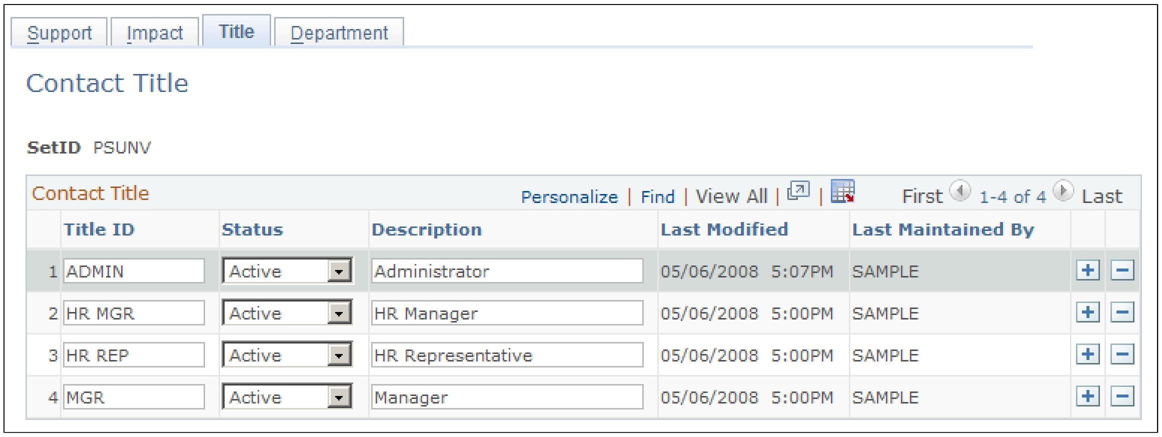
Use the Contact Title page (RSF_CONT_TITLE) to set up titles for describing contacts.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Sales Contacts > Contact Title

Image: Contact Title page

This example illustrates the fields and controls on the Contact Title page.



Create titles that enable sales users to identify a contact's position in the customer's organization.

Titles appear on the Organization tab in the Contacts grid of the Lead - Discover and Opportunity - Discover pages.

Note: The contact titles that you set up here are different from the contact roles, which are set up on the Contact Roles page and are used on the Impact tab in theContacts grid of the Lead - Discover and Opportunity - Discover pages. Contact roles are more detailed than titles. For example, you might set up *Vice President* as a title and *Vice President of Purchasing* as a role.

Related Links

Selecting Customer Contacts for a Lead or Opportunity

Contact Department Page

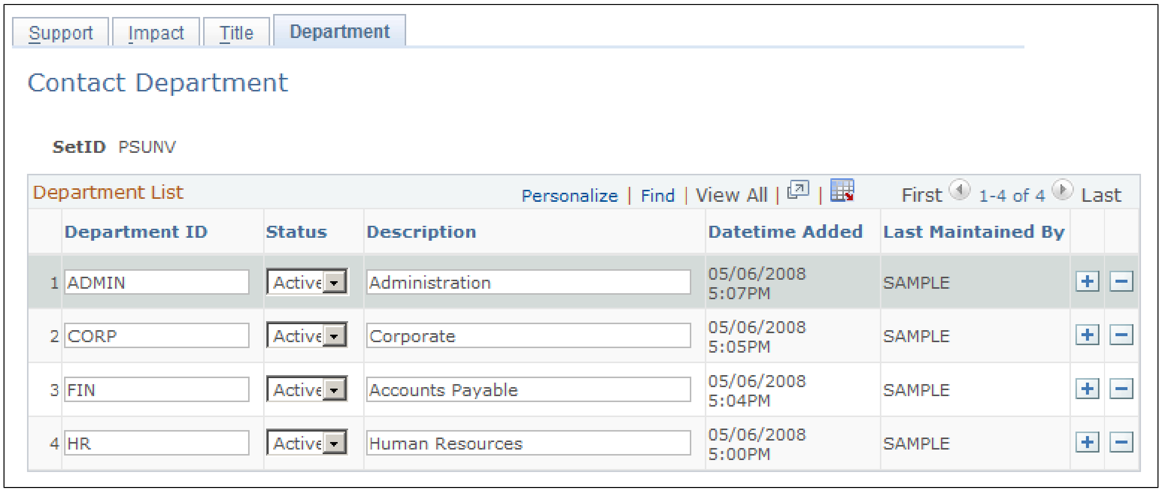
Use the Contact Department page (RSF_CONT_DEPART) to set up departments for describing contacts.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Sales Contacts > Contact Department

Image: Contact Department page

This example illustrates the fields and controls on the Contact Department page.



Create departments (for example, *Executive, IT, Marketing,* and *Sales)* that enable sales users to identify the department that a contact belongs to in the organization.

Departments appear on the Organization tab in the Contact grid of the Lead - Discover and Opportunity - Discover pages.

Related Links

Selecting Customer Contacts for a Lead or Opportunity

Contact Roles Page

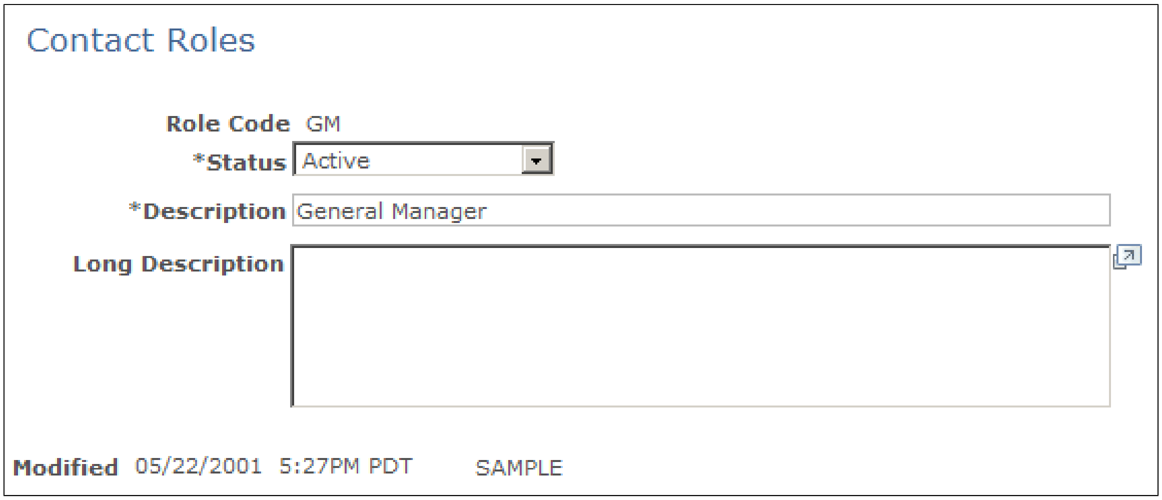
Use the Contact Roles page (RSF_ROLE_CD_TBL) to set up roles for describing contacts.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Contact Roles > Contact Roles

Image: Contact Roles page

This example illustrates the fields and controls on the Contact Roles page.



Define roles (for example, *Purchasing Manager, Purchasing Broker,* and *Vice President of Purchasing)* that enable sales users to identify the role that a contact has within the customer's organization.

Contact roles appear on the Contact tab in the Contacts grid of the Lead - Discover and Opportunity - Discover pages.

Related Links

Selecting Customer Contacts for a Lead or Opportunity

Setting Up Sales Competitors

This topic discusses how to:

- Set up the competitor role type and relationship.
- Set up business competitors and contacts.

Pages Used to Set Up Sales Competitors

Page Name	***Definition Name***	***Usage***
Role Type Page	BO_ROLE_TYPE	Set up the role type *Competitor,* which you can apply to various sales competitors.
Configure Relationship Views Page	BO_REL_VWCFG	Configure the competitor relationship.
Company Page	RD_COMPANY_MAIN_2	Create companies as sales competitors.

Role Type Page

Use the Role Type page (BO_ROLE_TYPE) to set up the role type Competitor, which you can apply to various sales competitors.

Navigation

Set Up CRM > Common Definitions > Customer > Role Type > Role Type

Set up the role type *Competitor* to identify the relationship of an external company or consultant with whom you compete for sales.

See "Defining Role Types and Role Categories" (PeopleSoft CRM 9.2: Business Object Management).

Configure Relationship Views Page

Use the Configure Relationship Views page (BO_REL_VWCFG) to configure the competitor relationship.

Navigation

Set Up CRM > Common Definitions > Customer > Configure Relationship Views > Configure Relationship Views

You must also configure the competitor relationship before you apply it to competing businesses.

See "Configuring the Relationship Viewer" (PeopleSoft CRM 9.2: Business Object Management).

Company Page

Use the Company page (RD_COMPANY_MAIN_2) to create companies as sales competitors.

Navigation

Customers CRM > Company

Enter information about the external companies or consultants that you set up as competitors.

See "Company - Summary: Details Page" (PeopleSoft CRM 9.2: Business Object Management).

Setting Up Buying Criteria

To set up buying criteria, use the Sales Buying Criteria (RSF_NEEDS) component.

This topic discusses how to:

- Set up buying criteria types.
- Set up buying criteria impact levels.
- Set up buying criteria priority levels.

- Set up buying criteria status values.

Note: The system does not display buying criteria fields on the Lead - Propose and Opportunity - Propose pages unless you use display templates to specify that you want to display the buying criteria fields.

See Setting Up Display Templates for Leads and Opportunities.

Pages Used to Set Up Buying Criteria

Page Name	***Definition Name***	***Usage***
Buying Criteria Type Page	RSF_NEED_TYPE	Define types to describe customer buying criteria.
Buying Criteria Impact Page	RSF_NEED_IMPACT	Define impact levels to describe customer buying criteria.
Buying Criteria Priority Page	RSF_NEED_PRIORITY	Define priority levels to describe customer buying criteria.
Buying Criteria Status Page	RSF_NEED_STATUS	Define statuses to describe customer buying criteria.

Buying Criteria Type Page

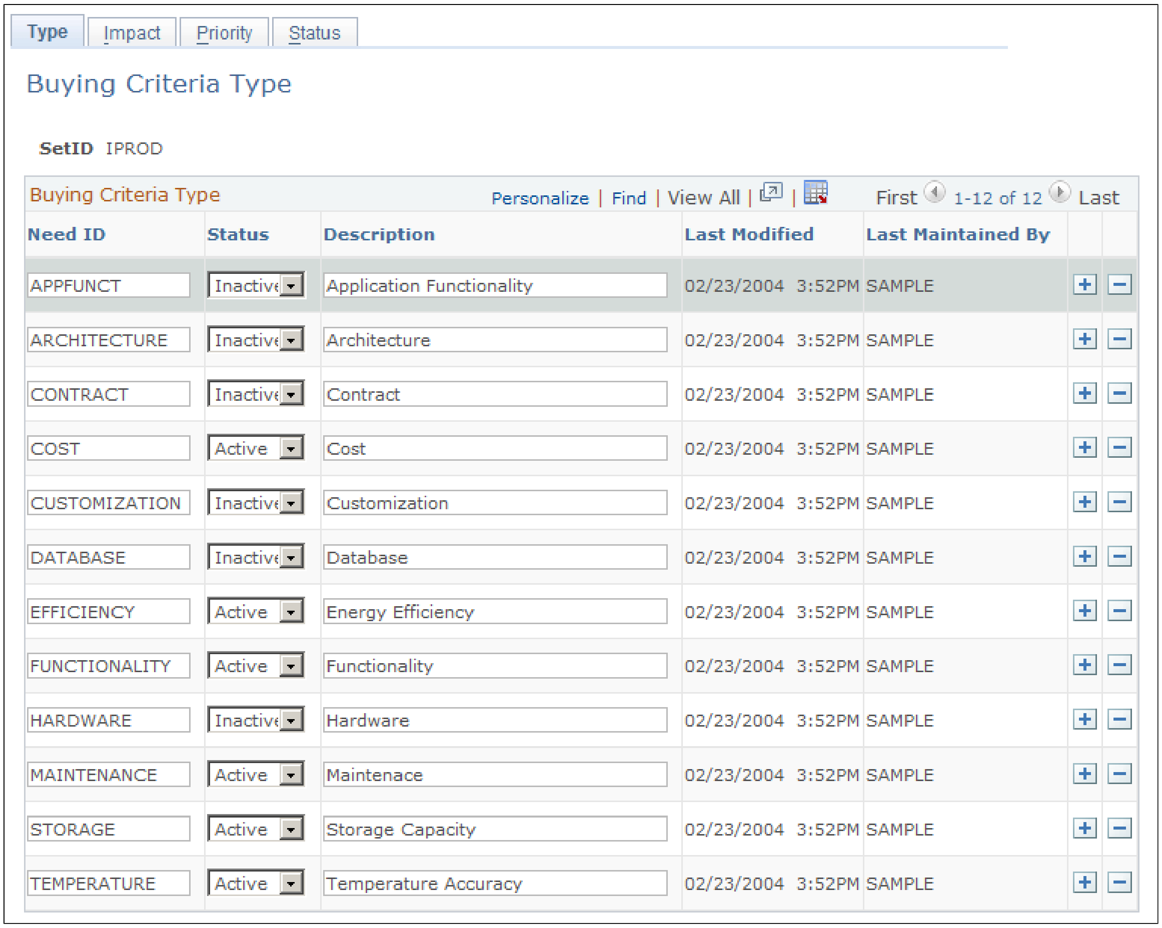
Use the Buying Criteria Type page (RSF_NEED_TYPE) to define types to describe customer buying criteria.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Sales Buying Criteria > Buying Criteria Type

Image: Buying Criteria Type page

This example illustrates the fields and controls on the Buying Criteria Type page.


Type | Impact | Priority | Status

Buying Criteria Type

SetID IPROD

Buying Criteria Type   Personalize | Find | View All | First 1-12 of 12 Last

Need ID	Status	Description	Last Modified	Last Maintained By
APPFUNCT	Inactive	Application Functionality	02/23/2004 3:52PM	SAMPLE
ARCHITECTURE	Inactive	Architecture	02/23/2004 3:52PM	SAMPLE
CONTRACT	Inactive	Contract	02/23/2004 3:52PM	SAMPLE
COST	Active	Cost	02/23/2004 3:52PM	SAMPLE
CUSTOMIZATION	Inactive	Customization	02/23/2004 3:52PM	SAMPLE
DATABASE	Inactive	Database	02/23/2004 3:52PM	SAMPLE
EFFICIENCY	Active	Energy Efficiency	02/23/2004 3:52PM	SAMPLE
FUNCTIONALITY	Active	Functionality	02/23/2004 3:52PM	SAMPLE
HARDWARE	Inactive	Hardware	02/23/2004 3:52PM	SAMPLE
MAINTENANCE	Active	Maintenace	02/23/2004 3:52PM	SAMPLE
STORAGE	Active	Storage Capacity	02/23/2004 3:52PM	SAMPLE
TEMPERATURE	Active	Temperature Accuracy	02/23/2004 3:52PM	SAMPLE

Enter a buying criteria ID, status, and description to identify the types of criteria that influence customer decisions to purchase. Add rows to create as many types as you need.

Related Links

Associating a Lead or Opportunity with a Source Campaign

Buying Criteria Impact Page

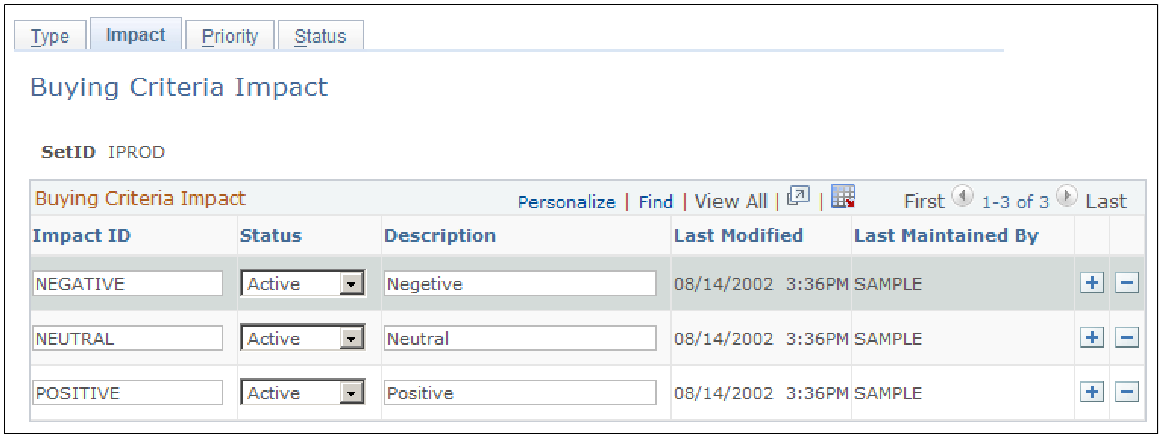
Use the Buying Criteria Impact page (RSF_NEED_IMPACT) to define impact levels to describe customer buying criteria.

Navigation

Set Up CRM > Product Related > Lead and Opportunity > Sales > Sales Buying Criteria > Buying Criteria Impact

Image: Buying Criteria Impact page

This example illustrates the fields and controls on the Buying Criteria Impact page.



Enter an impact ID, status, and description to identify the impact of buying criteria on customer decisions to purchase. Add rows to create as many impact levels as you need.

Related Links

Associating a Lead or Opportunity with a Source Campaign

Buying Criteria Priority Page

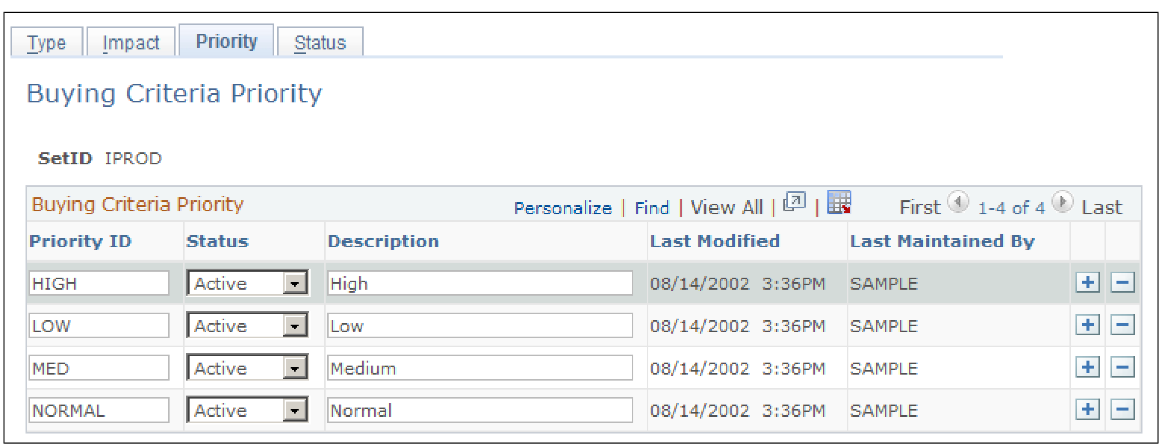
Use the Buying Criteria Priority page (RSF_NEED_PRIORITY) to define priority levels to describe customer buying criteria.

Navigation

Set Up CRM > Product Related > Lead and Opportunity > Sales > Sales Buying Criteria > Buying Criteria Priority

Image: Buying Criteria Priority page

This example illustrates the fields and controls on the Buying Criteria Priority page.



Enter a priority ID, status, and description to identify the priority of customers' need for a product. Add rows to create as many need priorities as necessary.

Related Links

Associating a Lead or Opportunity with a Source Campaign

Buying Criteria Status Page

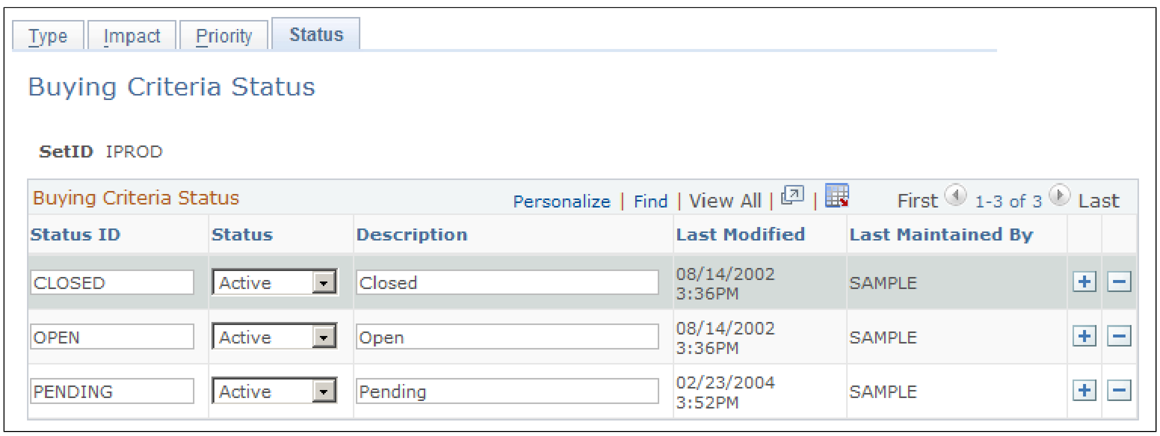
Use the Buying Criteria Status page (RSF_NEED_STATUS) to define statuses to describe customer buying criteria.

Navigation

Set Up CRM > Product Related > Lead and Opportunity > Sales > Sales Buying Criteria > Buying Criteria Status

Image: Buying Criteria Status page

This example illustrates the fields and controls on the Buying Criteria Status page.



Enter a status ID, status and description to identify the status of customers' need for a product. For example, you might create a buying criteria status of *Closed* or *Open.* Add rows to create as many status levels as you need.

Related Links

Associating a Lead or Opportunity with a Source Campaign

Setting Up Lead Sources

To set up a lead source, use the Lead Sources (RSF_LEAD_SOURCE) component.

This topic discusses how to set up lead sources.

Page Used to Set Up Lead Sources

Page Name	***Definition Name***	***Usage***
Lead Source Page	RSF_LEAD_SOURCE	Identify common sources for leads.

Lead Source Page

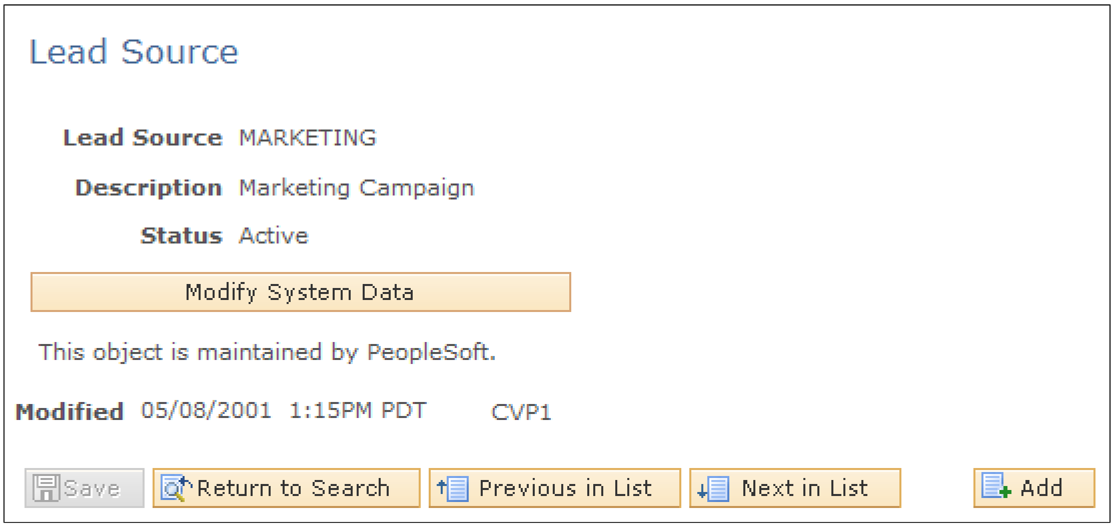
Use the Lead Source page (RSF_LEAD_SOURCE) to identify common sources for leads.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Lead Sources > Lead Source

Image: Lead Source page

This example illustrates the fields and controls on the Lead Source page.



Enter a description and status to identify each source that typically produces leads. PeopleSoft Sales delivers predefined lead sources, which includes, but not limited to, *Agreement, Case, Marketing, Online Marketing, Sales,* and *Tech Support.* You can modify or delete these, and you can create as many additional lead sources as you need.

When a sales user enters a lead, the system uses *Sales* as the lead source on the Lead - Qualify page.

Setting Up Fallout Reasons

To set up fallout reasons, use the Fallout Reason (RSF_FALLOUT_RSN) component.

This topic discusses how to set up fallout reasons.

Page Used to Set Up Fallout Reasons

Page Name	***Definition Name***	***Usage***
Fallout Reason Page	RSF_FALLOUT_RSN	Define reasons to describe why an opportunity is lost.

Fallout Reason Page

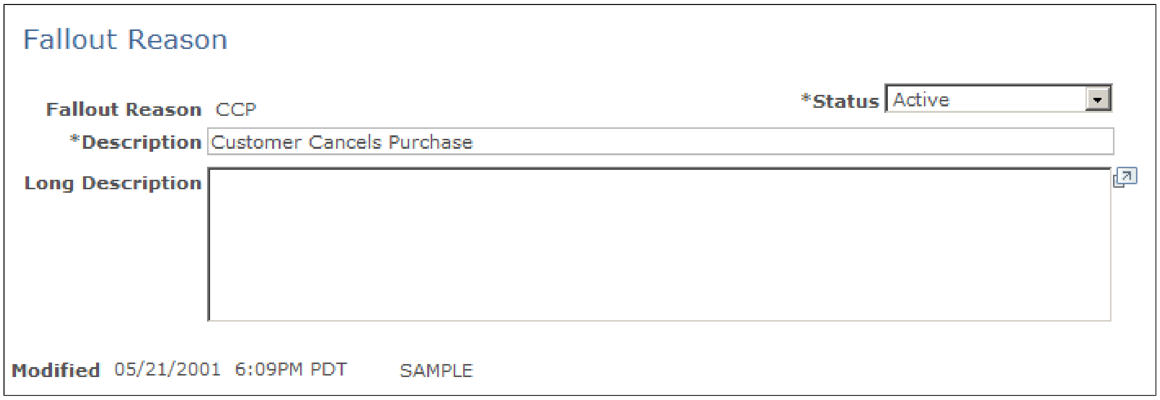
Use the Fallout Reason page (RSF_FALLOUT_RSN) to define reasons to describe why an opportunity is lost.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Fallout Reason > Fallout Reason

Image: Fallout Reason page

This example illustrates the fields and controls on the Fallout Reason page.



Enter a status, description, and long description (for example, *Customer Cancels Purchase, Lost Deal on Price,* and *Couldn't Meet Delivery Date)* to identify the reasons why an opportunity might be lost. Create as many fallout reasons as you need.

Setting Up Pipeline Segments

To set up pipeline segments, use the Pipeline Segments (RSF_SEGMENT) component.

This topic discusses how to define pipeline segments.

Page Used to Set Up Pipeline Segments

Page Name	***Definition Name***	***Usage***
Pipeline Segments Page	RSF_SEGMENT	Define pipeline segments that correlate to stages of the sales process.

Pipeline Segments Page

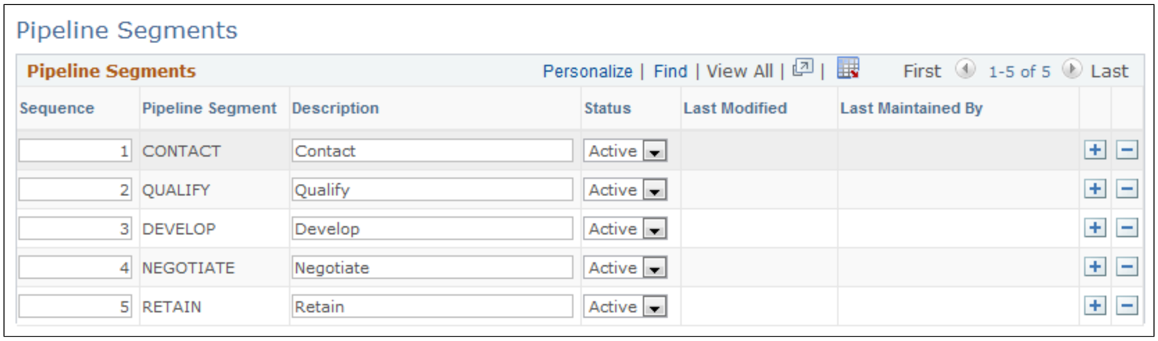
Use the Pipeline Segments page (RSF_SEGMENT) to define pipeline segments that correlate to stages of the sales process.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Pipeline Segment > Pipeline Segments

Image: Pipeline Segments page

This example illustrates the fields and controls on the Pipeline Segments page.



Pipeline segments correlate to stages of your sales process. The default segments correlate to the stages of the KES process: Contact, Qualify, Develop, Negotiate, and Retain.

Enter a description and status to identify each pipeline segment to correlate it to the stages of your business process.

Add rows to create additional segments. The system provides default sequence numbers. You can override the sequence numbers to reorder the stages.

Pipeline segments appear on the Segment Pipeline page in the Review Pipeline component.

See Viewing the Opportunity Pipeline.

Note: You can use other sales process definitions—for example, the Miller Heiman process—to define pipeline segments.

Setting Up Templates for Importing Leads

To set up templates for importing sales leads, use the Sales Lead Import Template (RB_IMP_TEMPLATE) component.

This section provides an overview of lead-import templates and discusses how to:

- Create a lead-import template.
- Rearrange fields on a template.
- View the import template map.

Pages Used to Set Up Templates for Importing Leads

Page Name	***Definition Name***	***Usage***
Import Template Page	RB_IMP_TEMPLATE	Create templates for importing sales lead data from comma-delimited spreadsheets.

Page Name	Definition Name	Usage
Import Resequencing page - Resequence Import Template Page	RB_IMP_SEQ_SEC	Override sequence numbers to rearrange fields on a template.
Maps Page	RB_IMP_TMPL_MAP	View the import template map.

Understanding Lead-Import Templates

When you import leads into PeopleSoft Sales, the system copies data from a spreadsheet to the Leads table and the Customer Data Model tables. Before you can import leads, you must set up a lead-import template that specifies the mapping between the spreadsheet and the tables. PeopleSoft Sales delivers a default template that can be used as delivered. You can create additional templates, if needed. When setting up a lead-import template, you use the Sales Lead Import Templates component to:

- Specify the fields to include during the import.
- Map the spreadsheet columns to fields in the Lead table.
- Set up duplicate checking for leads.
- Set up lookup criteria for Customer Data Model fields.

In addition, you can create a spreadsheet template that contains the column headings for fields that you import into PeopleSoft Sales.

Import Template Page

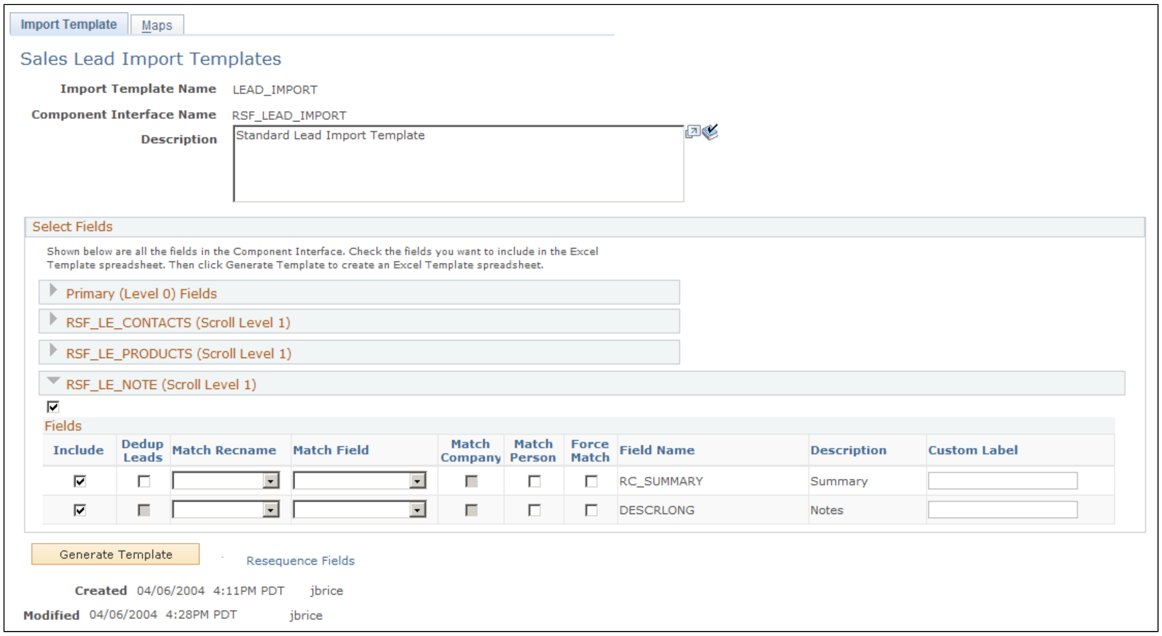
Use the Import Template page (RB_IMP_TEMPLATE) to create templates for importing sales lead data from comma-delimited spreadsheets.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Sales Lead Import Templates > Import Template

Image: Import Template page

This example illustrates the fields and controls on the Import Template page.



Each level of the Leads component interface is included as a collapsible section of the page. Each section lists all of the fields from that level. Select the fields to include in a Microsoft Excel spreadsheet to create a template for importing lead data.

Note: PeopleSoft Sales delivers a default template called LEAD_IMPORT. In the default template, some fields do not have the Include check box selected. These are system fields that are part of the template for processing purposes but are typically not included in a spreadsheet containing data to be imported. Access the Address Format page to determine the fields used for address formats specific to a country.

See "Setting Up Address Formats and Values" (PeopleSoft CRM 9.2: Application Fundamentals).

Select Fields

Expand a component interface level.

Include

Select to include the field during the import of lead data.

Dedup Leads (deduplicate leads)

Select to enable the system to use this field when searching for duplicate sales leads. If the system finds a sales lead with data that matches the spreadsheet data for all the fields that are duplicate-checked, the lead is marked as a duplicate and held for review.

Match Recname (match record name)

Select the record in the Customer Data Model table in which the field is stored.

Match Field

Select the field in the Customer Data Model record that is equivalent to the field name for the lead.

Match Company

Select this check box for all fields that the system uses to compare existing company data in the Customer Data Model tables against imported data. For all fields with the Match Company check box selected, if the imported data matches existing data, then the system does not add the company to the Customer Data Model tables.

Match Person

Select this check box for all fields that the system uses to compare existing person data in the Customer Data Model tables against imported data. For all fields with the Match Person check box selected, if the imported data matches existing data, then the system does not add the person to the Customer Data Model tables.

Force Match

Select this check box to force a match of the imported data with the data in the Customer Data Model table. For example, an email address is typically unique and could be used to force a match of a contact.

Field Name and **Description**

Displays the name and description of the field in the Leads table into which the data is imported.

Custom Label

Enter the label or column heading in the spreadsheet from which the system retrieves data for the field.

Page Actions

Generate Template

Click to generate the template, after selecting the fields, specifying the custom labels, and resequencing the fields (if necessary).

The system generates a Microsoft Excel spreadsheet template (only the column headers are provided) and opens it in a separate window. You can use this as a starting point to enter actual data into the spreadsheet.

Generating the template automatically saves the entire page. At any time after the page is saved, you can select the Maps tab to view a list of the column headings and see how the fields correlate to them.

Warning! If you manually change a column heading in the Microsoft Excel spreadsheet, the mapping for that field is lost and the system cannot determine how to map that column to a database field.

Resequence Fields

Click to access the Resequence Import Template page, where you can override sequence numbers to reorder the fields in the template.

Import Resequencing page - Resequence Import Template Page

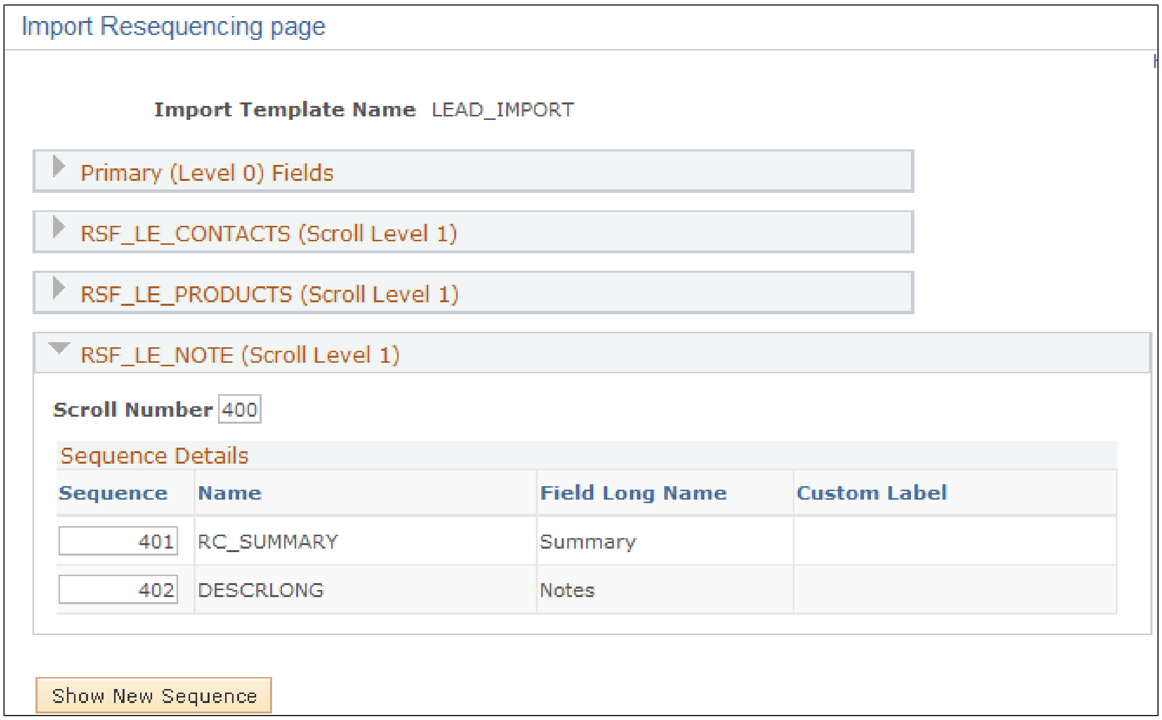
Use the Import Resequencing page - Resequence Import Template page (RB_IMP_SEQ_SEC) to override sequence numbers to rearrange fields on a template.

Navigation

Click the Resequence Fields link on the Import Template page.

Image: Import Resequencing page - Resequence Import Template page

This example illustrates the fields and controls on the Import Resequencing page - Resequence Import Template page.



Sequence

Override the numbers to rearrange the component level fields, if necessary. This option resequences only the fields on the template. It does not affect how fields appear on pages in the components.

Show New Sequence

Click to view the fields in the new order.

OK

Click to accept the new sequence and return to the template page.

Cancel

Click to return to the template page without resequencing.

Maps Page

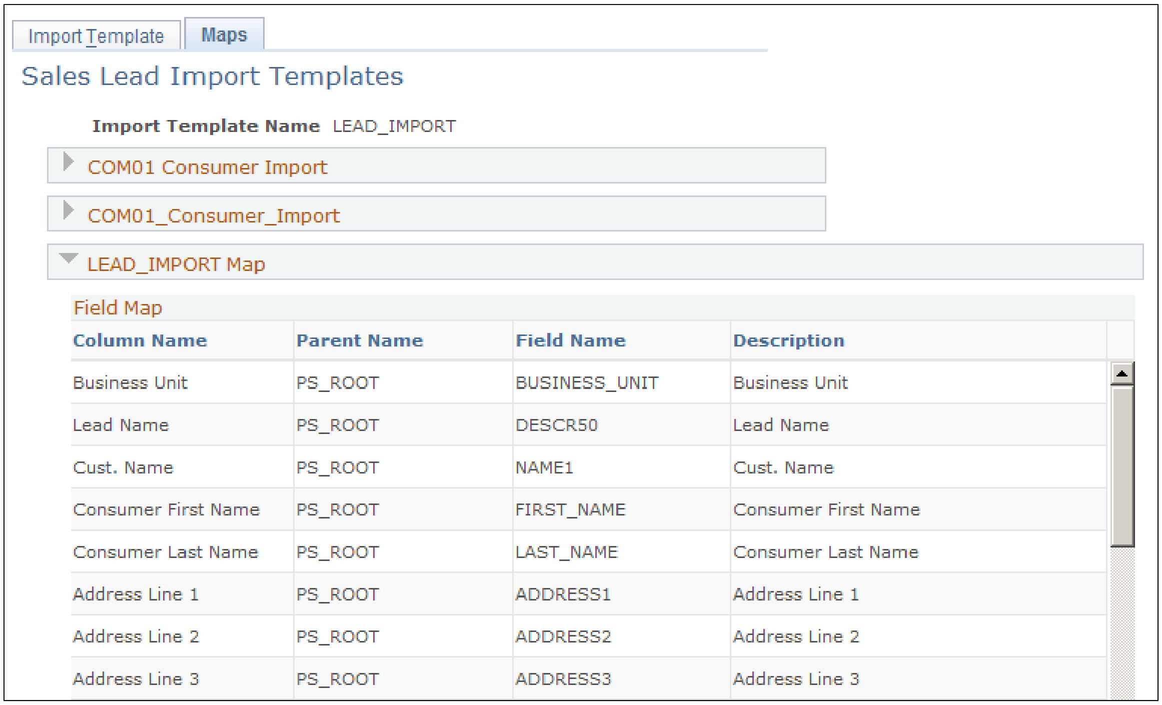
Use the Maps page (RB_IMP_TMPL_MAP) to view the import templates map.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Sales Lead Import Templates > Maps

Image: Maps page

This example illustrates the fields and controls on the Maps page.



After you generate the template, view a list of the column headings to see how the fields correlate.

Setting Up the Summary Page for Leads and Opportunities

This section provides an overview of summary pages for leads and opportunities and discusses how to:

- Configure the summary page for leads and opportunities.
- Precalculate terms that appear on the summary page.
- View a list of term updates.
- Update business object names.

See Managing a Lead or Opportunity by Using Summary Information.

Pages Used to Set Up the Summary Page for Leads and Opportunities

Page Name	***Definition Name***	***Usage***
Summary Page Setup Page	RB_SMRY_GRID	Configure the summary page for leads or opportunities.
Term Selection Page	RB_SMRY_SEL_TERM	Search for a term to appear on the summary page.

Page Name	***Definition Name***	***Usage***
Schedule Updates Page	RSF_TL_RUN	Precalculate terms that appear on the Summary page.
View Update Result Page	RSF_UPDATE_SRCH	View a list of term updates.
Updating Business Object Names Page	RSF_UPD_BO_ATTR	This program corrects the customer, site, and contact names in Lead and Opportunity tables to match with the customer master data.

Understanding Summary Pages for Leads and Opportunities

The component summary page is the first page that a user sees on displaying an existing lead or opportunity. Each summary page is composed of a header, which identifies the component as a lead or opportunity, and one or more sections.

Sales delivers a standard setup for leads and opportunities and provides a component for you to modify the delivered setup. The delivered summary page for leads includes the following sections: summary, contacts, tasks, notes, team, products, and quotes. You can add sections or modify sections.

RSF_LEAD_ENTRY is the component name for the lead summary page for leads, and *RSF_OPPORTUNITY* is the component name for the opportunity summary page.

Summary Page Setup Page

Use the Summary Page Setup page (RB_SMRY_GRID) to configure the summary page for leads or opportunities.

Navigation

Set Up CRM > Common Definitions > Component Configuration > Summary Page Setup > Summary Page Setup

Image: Summary Page Setup page (1 of 2)

This example illustrates the fields and controls on the Summary Page Setup page (1 of 2).

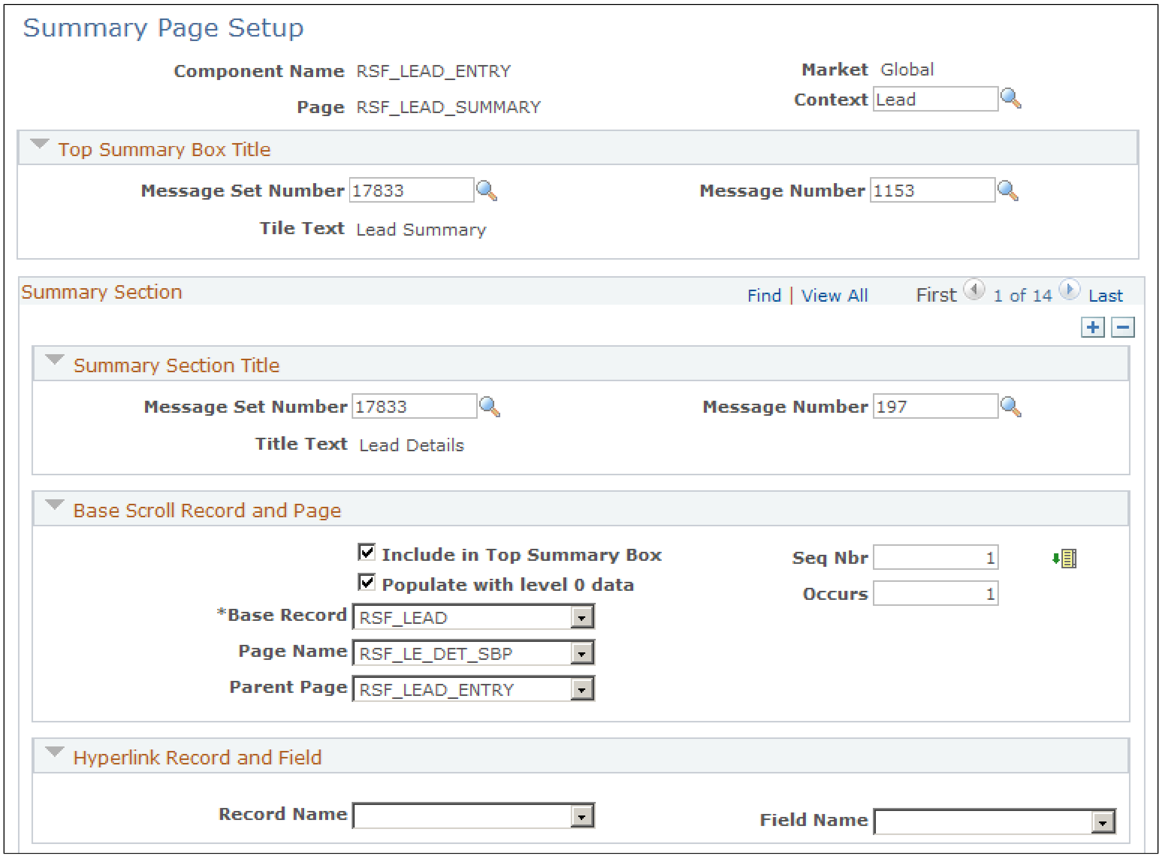
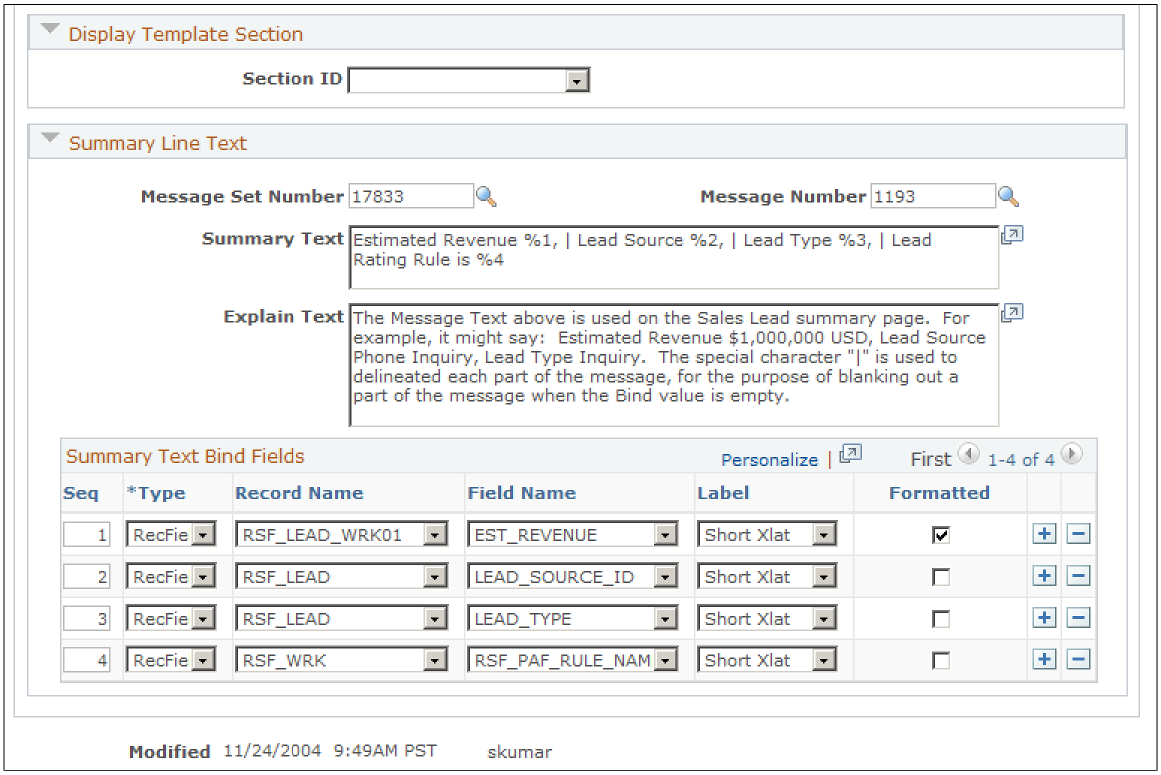


Image: Summary Page Setup page (2 of 2)

This example illustrates the fields and controls on the Summary Page Setup page (2 of 2).



Top Summary Box Title

These fields also appear in the Summary Section Title region. The values that you enter in these fields determine the information that displays in the title areas of the report. It is recommended that you do not change the information in the Top Summary Box Title collapsible section.

Message Set Number	Enter the message set number for the PeopleSoft application. In most cases, you use *17833* (Sales Force Automation).
Message Number	Enter the message number, which determines the section heading.
Title Text	Displays the text that appears on the summary page. This text is based on the message number that you select.

Summary Section

This region contains a list of sections that you want to be available on the Summary page of leads and opportunities.

Summary Section Title

Enter a message set number and a message number to identify the title for each section that appears on the Summary page.

Base Scroll Record and Page

The fields on this page region determine the source and placement of the information that appears in the section.

Include in Top Summary Box

Select to include this section in the summary box at the top of the summary page.

Populate With level 0 data

Select to indicate that the data that is displayed in the section comes from level 0, as opposed to a scroll of information. For example, on the Lead - Summary page, level 0 information is from the highest level RSF_LEAD record. Only the top summary box can contain level 0 information.

If this check box is not selected, lower level information from the record appears. For the RSF_LEAD record, this might be the list of contacts or products for the lead.

Seq Nbr (sequence number)

Enter a sequence number for the section.

Occurs

Enter the number of rows to include in the section. For example, if the section contains a list of contacts, enter the number of contacts to show.

Click to reorder the sections based on changes that you made to the Seq Nbr field.

Base Record

Select the record that is the source of the data.

Page Name

Select the subpage, or page region, that is used to view and maintain the records that appear in the summary scroll area.

Parent Page

Select the parent of the subpage that you use to maintain and view the data. The system transfers to the parent page when the user clicks a link on the summary page.

Hyperlink Record and Field

Record Name

To include a link in the section, enter the record containing the target field for the link.

Field Name

To include a link in the section, enter the target field for the link.

Display Template Section

Section ID

Select a display template section ID for the corresponding summary section (for example, choose *COMPETITION* section ID for the *Competition* summary section), which is used by the system to hide the section on the Summary page if its matching detail section is no longer displayed on any other pages of the component (as configured using a display template).

When a section ID is specified here, the system checks to see if the corresponding section is visible on any page of the said component. If the section is configured to be displayed on a page of the component, its summary section is also visible. But if an administrator disables the section from being displayed on any pages of the component, then its summary section will be removed from the Summary page accordingly.

If a section ID is not specified, no checking is performed and the summary section always appears. An example is the display of the Tasks, Notes, and Call Reports sections on the Summary page for both leads and opportunities. Because the Tasks, Notes, and Call Reports pages do not contain any sections in the core display templates, they cannot be referenced on the summary page setup using section IDs. Therefore, these sections are always displayed on the Summary page even if their corresponding pages are actually hidden from the component through display templates.

As delivered, this functionality is only supported on the *CORE* display templates for leads and opportunities in which the Summary page is configured to be shown. The summary page setup for the Lead component has these sections mapped to corresponding section IDs: *Contacts*, *Competition*, and *Products.* As for the Opportunity component, each of these sections is mapped to a section ID: *Contacts*, *Team*, *Products*, *Competition* and *Quotes*.

Summary Line Text

Message Set Number Enter the message set number for the PeopleSoft application. In most cases, you use *17833* (Sales Force Automation).

Message Number Enter the message number, which determines the text that the system displays in the section.

Summary Text The system displays the variables and text that appear in the section. The variables are designated by the percent sign followed by a number; for example, *%1*. The variables correspond to the numbers in the Summary Text Bind Fields section.

Explain Text The system displays an explanation of the text that appears in the section.

Summary Text Bind Fields

Seq (sequence) Enter the sequence number. This number is associated with the variable number in the Summary Text field.

Type Select *Record* (default) to enter record information and *Term* to enter term information.

If you select *Record,* then the Record Name, Field Name, Label, and Formatted fields are enterable. If you select *Term,* then you must click the Lookup Term button to select a Term Name and enter a value in the Message Nbr (Message Number) field.

Record/Term Name

Select the record or term that contains the field that the system displays.

If you select the *Record* type, then you select the system name of the record from the available choices.

If you select the *Term* type, then you click the Select Term button to select a term from the lookup page for use in the summary text.

Field Name

Select the field that the system displays. This field appears only if you select the *Record* type.

Label

Select the source of the field that appears on the summary page. This field appears only if you select the *Record* type. Values are:

- (blank)

  This is the default. Select it to display the field value as stored in the database on the component summary page.

- *Short XLAT*
- *Long XLAT*

For example, a lead type that is represented as *QU* (Qualified) in the database might have a Short XLAT (short translate) value of *Qualified* and a Long XLAT (long translate) value of *Qualified Lead.*

Format Display

Select to display the formatted display-value of the field. For example, for a currency field, you might have the system display *$1,000.00* instead of the value *1000.* This field appears only if you select the *Record* type.

Term Name

Displays the name of the term that you select.

Click to access an untitled page where you can select an AAF (Active Analytics Framework) term that the system displays.

Related Links

Active Analytics Framework

Setting Up Lead Ratings

Schedule Updates Page

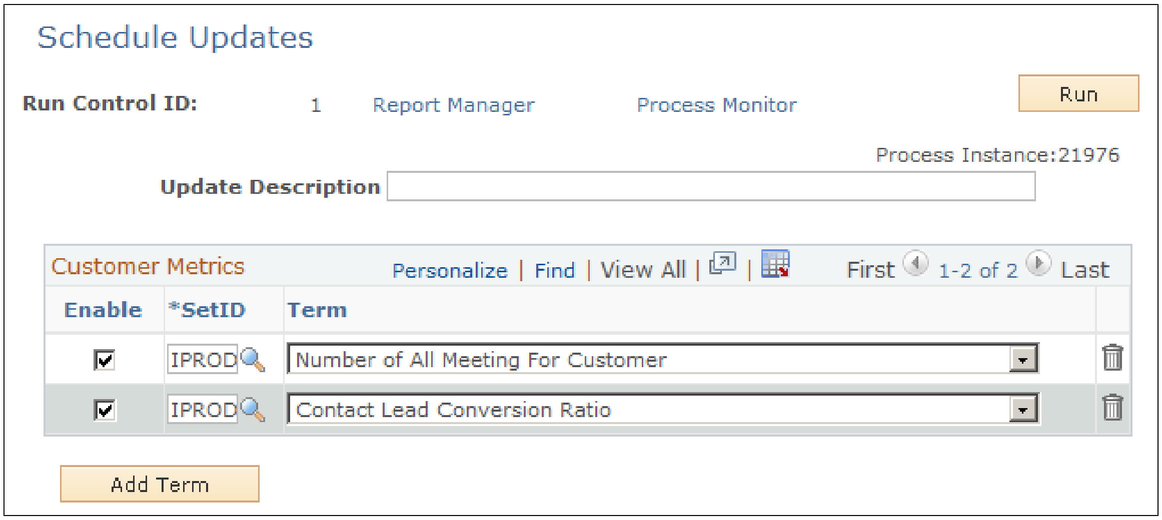
Use the Schedule Updates page (RSF_TL_RUN) to precalculate terms that appear on the Summary page.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Schedule Term Update > Schedule Updates

Image: Schedule Updates page

This example illustrates the fields and controls on the Schedule Updates page.



Enter the following information and click the Run button. You can save an update and run it multiple times.

Update Description	Enter a description for the set of metrics you select to run.
Enable	Select to calculate the term when you run the update.
SetID	Select the setID whose data to use to calculate the term.
Term	Select the term to calculate. Only terms that were added to the Summary Text Bind Fields for either the Lead or Opportunity component are available in this list.

View Update Result Page

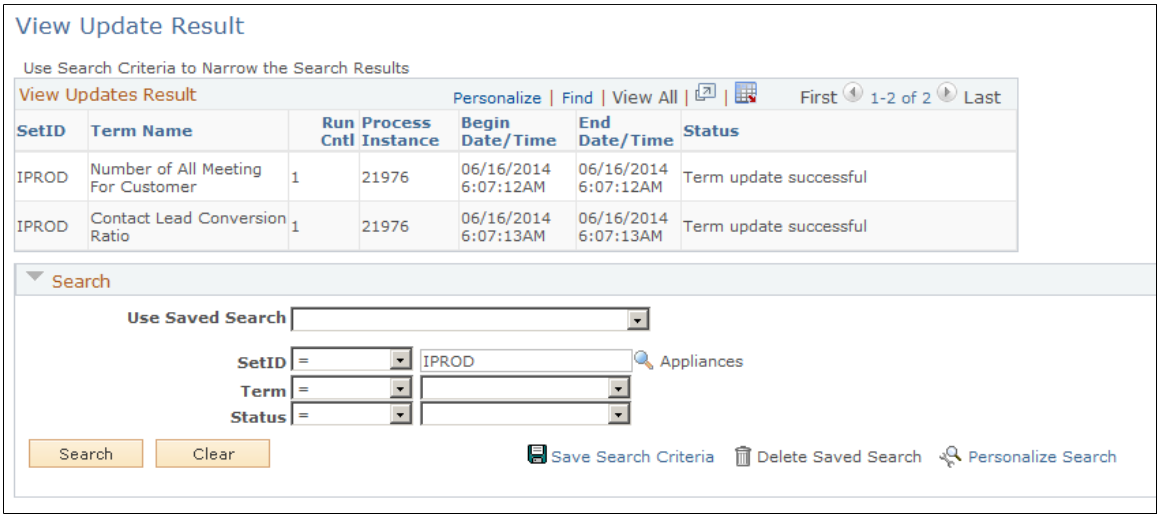
Use the View Update Result page (RSF_UPDATE_SRCH) to view a list of term updates.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > View Update Result > View Update Result

Image: View Update Result page

This example illustrates the fields and controls on the View Update Result page.



This page displays a list of the term updates that were run for a given setID and information about the run.

Updating Business Object Names Page

Use the Update Business Object Names page (RSF_UPD_BO_ATTR) to this program corrects the customer, site, and contact names in Lead and Opportunity tables to match with the customer master data.

Navigation

Set Up CRM > Product Related > Sales > Lead and Opportunity > Update Business Object Names > Update Business Object Names

This Application Engine program synchronizes the customer, site, and contact names in Lead and Opportunity tables to match with the customer master data.

Setting Up Display Templates for Leads and Opportunities

PeopleSoft Sales provides display templates that enable you to control the appearance and behavior of the Lead and Opportunity components for specific business needs. For the Lead component (RSF_LEAD_ENTRY) and Opportunity component (RSF_OPPORTUNITY), two delivered display templates are available: *CORE.* and *HE_SALES.*

See "Configuring Display Templates for Components" (PeopleSoft CRM 9.2: Automation and Configuration Tools).

Pages Used to Set Up Display Templates for Leads and Opportunities

Page Name	***Definition Name***	***Usage***
Display Template Page	RDT_TMPL_PAGE	Set up display templates for leads and opportunities.

Page Name	***Definition Name***	***Usage***
Display Template - Page Definition Page	RDT_TMPL_SECTN	Use a functional option with the display template.

Display Template Page

Use the Display Template page (RDT_TMPL_PAGE) to set up display templates for leads and opportunities.

Navigation

Set Up CRM > Common Definitions > Component Configuration > Display Templates > Display Template Details > Display Template

Image: Display Template page of the Lead component (1 of 2)

This example illustrates the fields and controls on the Display Template page of the Lead component (1 of 2).

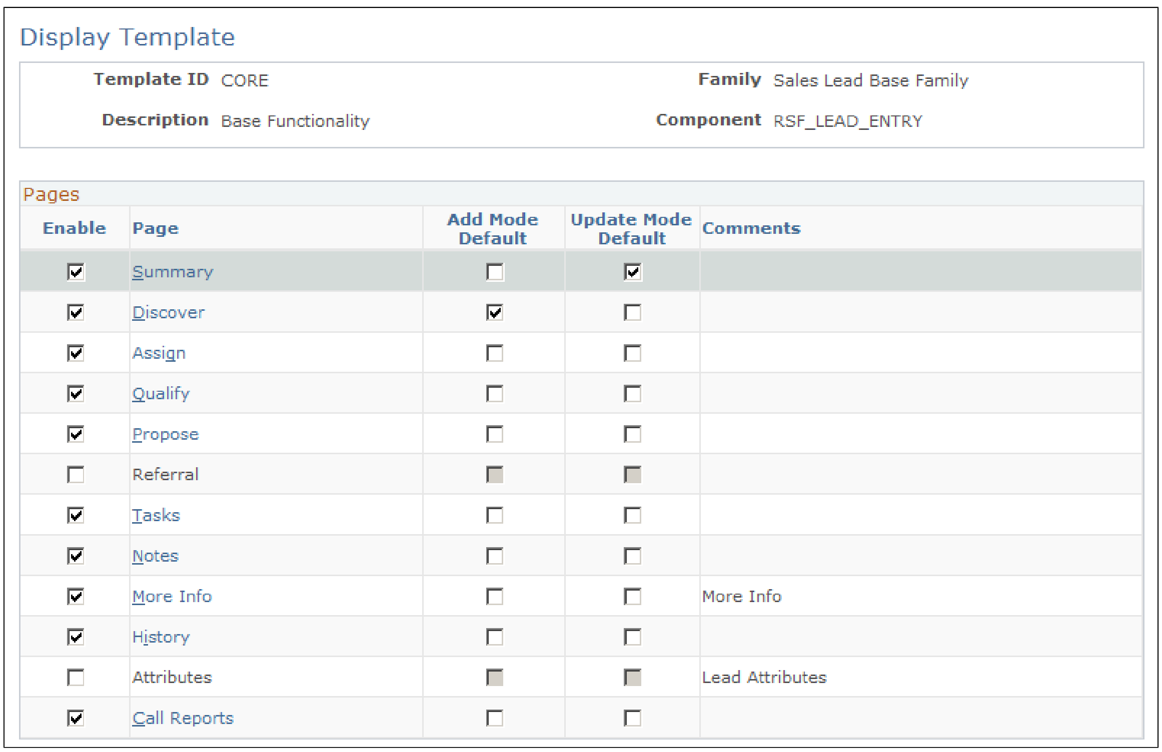
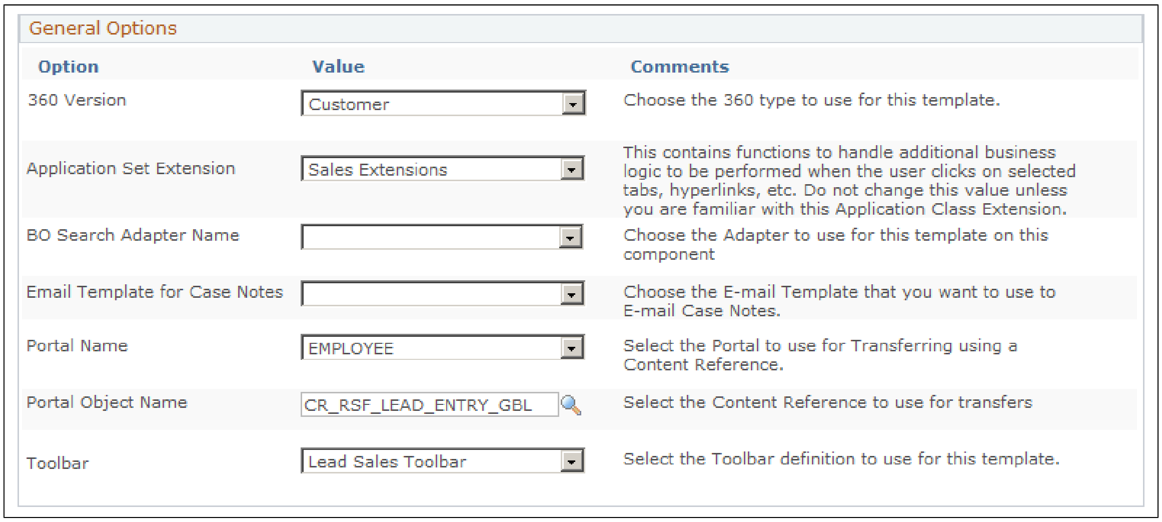


Image: Display Template page of the Lead component (2 of 2)

This example illustrates the fields and controls on the Display Template page of the Lead component (2 of 2).



This table lists the default configurations for the pages defined for the *CORE* display template for the Lead and Opportunity components:

Page	***Configuration***
Summary	Configure the Summary page by using the Summary Page Setup page. See Setting Up the Summary Page for Leads and Opportunities. The functional option *CORE_RSF_SUMMARY* determines whether a user can view the Summary page. See Setting Up Functional Options.
Discover	Displays the Customer, Lead/Opportunity Details, Contacts, and Accept/Reject sections.
Assign	Displays the Sales Team Members section.
Qualify	Displays the Campaign, Competition, and Survey sections.
Propose	Displays the Product and Quote/Order sections. For opportunities, it also displays the Forecast section.

Functional Option Used with the Display Template

Access the Display Template - Page Definition page (click a page link on the Display Template page. Click the Show Section Details link and select the Security tab of a section).

Image: Display Template - Page Definition page (1 of 2)

This example illustrates the fields and controls on the Display Template - Page Definition page (1 of 2).

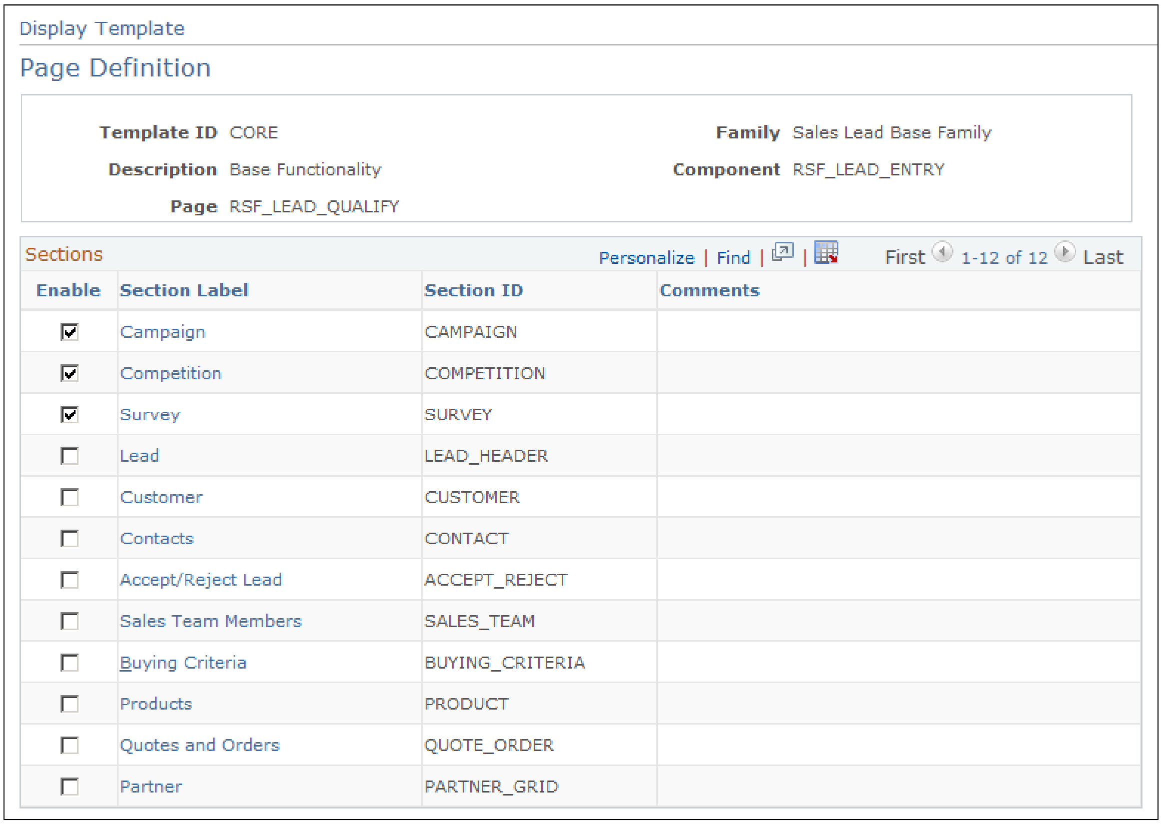
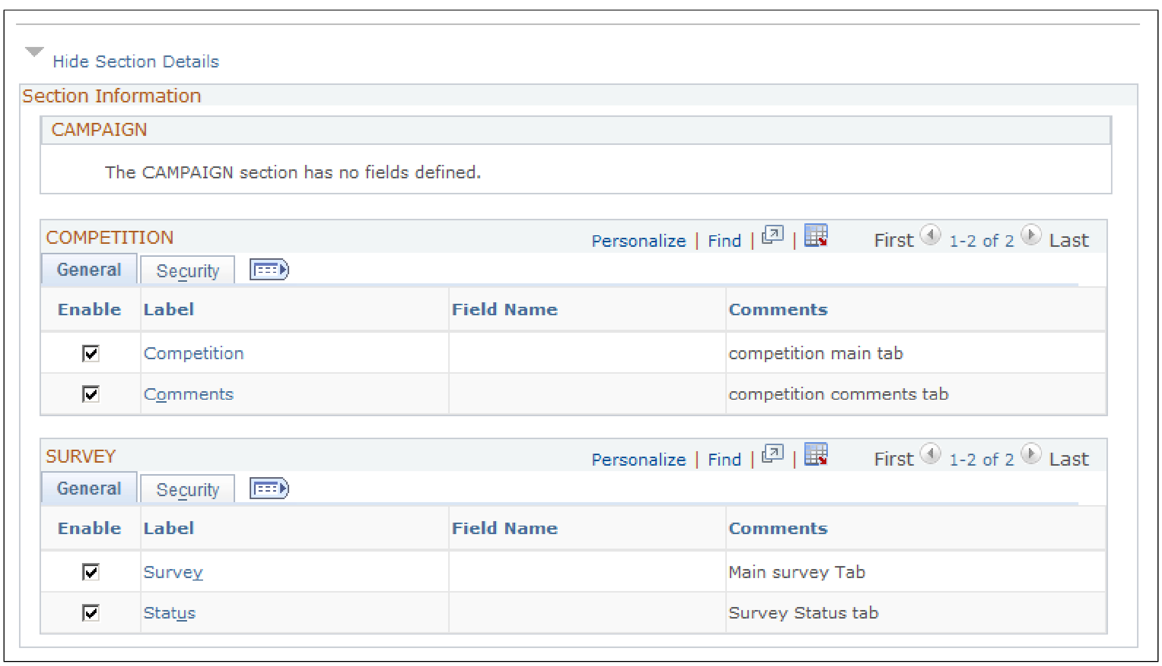


Image: Display Template - Page Definition page (2 of 2)

This example illustrates the fields and controls on the Display Template - Page Definition page (2 of 2).



You can enter *CORE_RSF_ADVANCED* in the Functional Option Code field on the Security tab to either display or hide a field or grid tab in the Lead or Opportunity component, depending on the setting of the functional option for a user.

See Setting Up Functional Options.

This table displays the grid tabs and fields in the delivered *CORE* display template for leads and opportunities that have the value *CORE_RSF_ADVANCED* in the Functional Option Code field:

Page - Section	***Grid Tab or Field***
Discover - Contacts	Phones tab, Impact tab, Organization tab, Correspondence tab
Assign - Sales Team Members	Territory tab, Additional Details tab, Comments tab
Qualify - Competition	Comments tab
Qualify - Survey	Status tab
Propose - Forecast (opportunity only)	Revenue Type field
Propose - Quote	Order tab, Audit tab

To hide or display specific fields or grid tabs in the Lead or Opportunity component, you can edit the *CORE* display template.

Setting Up Task Group Templates for Leads and Opportunities

This section provides an overview of task group templates and discusses how to:

- Define task group templates.
- Associate task group templates with lead statuses.
- Associate task group templates with opportunity sales stages.

Page Used to Set Up Task Group Templates for Leads and Opportunities

Page Name	***Definition Name***	***Usage***
Task Group Template	RB_TSK_GRP_TPL	Define task group templates, which consist of lists of related tasks that can be populated to leads and opportunities.

Understanding Task Group Templates

A task group template is a grouping of related tasks performed to accomplish certain goals. When you select a task group template to apply to a component, the system automatically populates the set of predefined tasks on the Tasks page of that component, saving time that you otherwise must spend entering those tasks one by one. Both the Lead and Opportunity components support the use of task group templates, which can be applied in two ways:

- Manually, by selecting an existing task group template on the Tasks page.
- Automatically, through the use of the AAF policies that populate sales tasks when the corresponding policy condition is met.

  Delivered AAF policies are available for populating tasks when the status of leads is set to *Open* or *Rejected*, or when the sales stage of opportunities is set to *Discover*, *Qualify Customer*, or *Develop Solution.* You can modify or create new policies for other situations where sales tasks need to be populated by the system.

  Note: The system populates sales tasks on leads and opportunities whenever a triggering event occurs (before saving a lead or opportunity) and the conditions of sales tasks-related policies are met, which can take place multiple times. In an example of leads, if you update the status of a lead from *New* to *Open*, to *Working*, then back to *Open*, and you save the lead *every time* a status is changed, the system populates the same set of sales tasks twice for the two times when the lead status was changed to *Open*. Duplicate tasks are allowed on the Tasks page.

Defining Task Group Templates

Delivered task group templates are available for the Lead (*Lead Open* and *Lead Rejected*) and Opportunity components (*Opportunity Discover*, *Opportunity Qualify* and *Opportunity Solution*).

See "Task Group Template Page" (PeopleSoft CRM 9.2: Application Fundamentals).

Associating Task Group Templates with Lead Statuses

To associate task group templates with lead status using AAF policies:

Note: The CRM system delivers policies (for *IPROD* and *SHARE* setIDs) that populate preset tasks to leads when the lead status is set to *Open* or *Rejected.*

---

1. Navigate to Enterprise Components > Active Analytics Framework > Policies > Manage Policies.
2. Click the Build a Policy button.
3. Enter a policy name and the setID in which the policy is used.

   Use *Before a Lead is Saved* as the trigger point.
4. Click the Add Condition button.

   The Build a Policy - Add Condition page appears.
5. Click the Select Term link.

   In the *Select Subject Area* section, expand the Sales node, then click the Lead link. Select the Lead Status term on the right column.
6. A term is selected on the Build a Policy - Add Condition page.

   Now, enter an operator and value to finish building the condition.

For example, if this policy needs to be evaluated when the status of leads is set to *Rejected,* select *is changed to* as the operator and *Rejected* as the value.

7. Click the Done button.
8. Click the Add Actions button to specify an action for the policy.

   Select *Sales Task* as the action type and enter an action name.
9. Click the Configure button on the same row. The Configure Sales Task Action page appears.
10. In the Task Details section, select *Lead* as the application usage, and an applicable task group template (for example, *Lead Rejected*).
11. Click the OK button.
12. Click the Done button to confirm the action configuration.
13. Click the Activate button and then the Save button to save the new policy in active mode.

Refer to the "Building and Managing Policies" topic for more information on how to build and manage AAF policies.

Related Links

Active Analytics Framework

Associating Task Group Templates with Opportunity Sales Stages

To associate task group templates with opportunity sale stages using AAF policies:

Note: The CRM system delivers policies (for *IPROD* and *SHARE* setIDs) that populate preset tasks to opportunities when the opportunity sales stage is set to *Discover, Qualify Customer,* or *Develop Solution.*

---

1. Navigate to Enterprise Components > Active Analytics Framework > Policies > Manage Policies.
2. Click the Build a Policy button.
3. Enter a policy name and the setID in which the policy is used.

   Use *Before an Opportunity is Saved* as the trigger point.
4. Click the Add Condition button.

   The Build a Policy - Add Condition page appears.
5. Click the Select Term link.

   In the Select Subject Area section, expand the Sales node, then click the Opportunity link.

   Select the Opportunity Sales Stage term on the right column.
6. A term is selected on the Build a Policy - Add Condition page.

   Now, enter an operator and value to finish building the condition.

For example, if this policy needs to be evaluated when the sales stage of opportunities is set to *Develop Solution,* select *is changed to* as the operator and *SOLUTION* as the value.

7. Click the Done button.
8. Click the Add Actions button to specify an action for the policy.

   Select *Sales Task* as the action type and enter an action name.
9. Click the Configure button on the same row.

   The Configure Sales Task Action page appears.
10. In the Task Details section, select *Opportunity* as the application usage, and an applicable task group template (for example, *Opportunity Solution*).
11. Click the OK button.
12. Click the Done button to confirm the action configuration.
13. Click the Activate button and then the Save button to save the new policy in active mode.

Refer to the "Building and Managing Policies" topic for more information on how to build and manage AAF policies.

Related Links

Active Analytics Framework

Chapter 6

Setting Up Sales Forecasts

Understanding Forecast Setup

Sales managers can use forecasts in PeopleSoft Sales to predict sales for a specific time period. You create a forecast in PeopleSoft Sales by uniquely identifying a forecast name and a time frame. The forecast name is a user-defined text field that describes characteristics of the forecast. The time frame specifies a particular week, month, quarter, or year.

For example, suppose that the current date is April 1, 2004, and you are forecasting the sales of freezers for the third quarter of 2004 (July 1 to September 30). You generate forecasts monthly, so you expect to forecast again on May 1, 2004, and June 1, 2004. You can create three forecast names to meet your forecasting needs:

- Freezers: Apr
- Freezers: May
- Freezers: Jun

For the time frame, you must set up quarterly time frames in 2004. When you create a forecast, you select one of the forecast names and the third quarter 2004 time frame.

You use the Time Frame component to set up time frames.

See "Defining Holiday Schedules, Time Frames, and Sales Quota Rollups" (PeopleSoft CRM 9.2: Application Fundamentals).

Defining Forecast Elements

To define forecast names, use the Forecast Names (RSF_FCAST_ID) component. To define forecast types, use the Forecast Type (RSF_FCAST_TYPE) component. To define revenue types, use the Revenue Type (RSF_REV_TYPE) component.

This topic discusses how to:

- Define forecast names.
- Define forecast types.
- Define revenue types.

Pages Used to Define Forecast Elements

Page Name	***Definition Name***	***Usage***
Forecast Name Page	RSF_FCAST_ID	Define forecast names.
Forecast Type Page	RSF_FCAST_TYPE	Define forecast types, which are user-defined classifications.
Revenue Type Page	RSF_REV_TYPE	Define revenue types.

Forecast Name Page

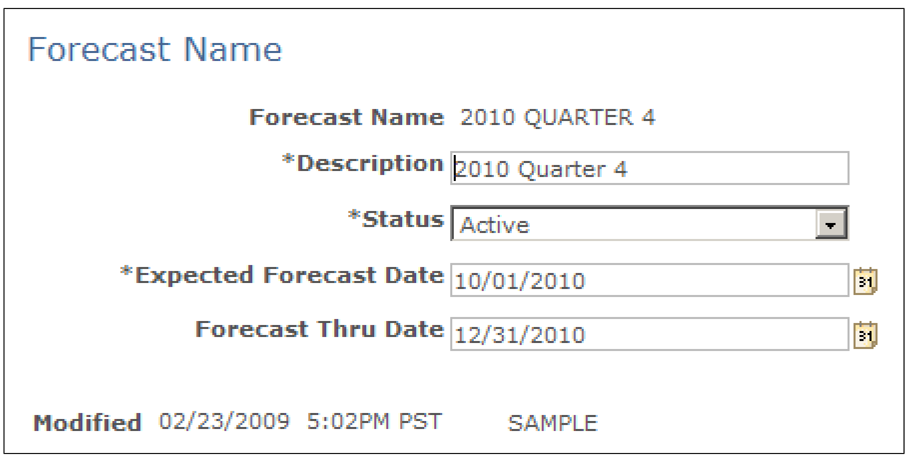
Use the Forecast Name page (RSF_FCAST_ID) to define forecast names.

Navigation

Set Up CRM > Product Related > Sales > Forecast > Forecast Names > Forecast Name

Image: Forecast Name page

This example illustrates the fields and controls on the Forecast Name page.



Expected Forecast Date

Enter the date on which sales users can use the forecast name to generate a forecast.

For example, suppose that the current date is May 1, 2009, and you are setting up a forecast name called *Freezers:June* for a forecast that will occur in June 2009. You do not want to make this forecast name available until June 2009, so you would enter an expected forecast date of June 1, 2009.

Forecast Thru Date (forecast-through date)

Enter the ending date for forecasting.

For example, suppose you are going to stop selling a product at the end of 2009. You would establish a forecast name with a forecast-through date of December 31, 2009. Sales users cannot use the forecast name to generate a forecast for the product for any time frames that begin after December 31, 2009.

The system generates a list of possible forecasts for a forecast name when there are time frame periods defined. For example, suppose you enter an expected forecast date of July 1, 2009, and a forecast-through date of September 30, 2009. The system builds a list of possible forecasts using that forecast name and the following time frames:

- July, August, and September 2009 (if you use monthly time frames).
- Third quarter 2009 (if you use quarterly time frames).
- 2009 (if you use yearly time frames).

The system displays the list of possible forecasts on the Search My Forecasts and Search Rollup Forecasts components.

See "Calendar Options Page" (PeopleSoft CRM 9.2: Application Fundamentals).

Forecast Type Page

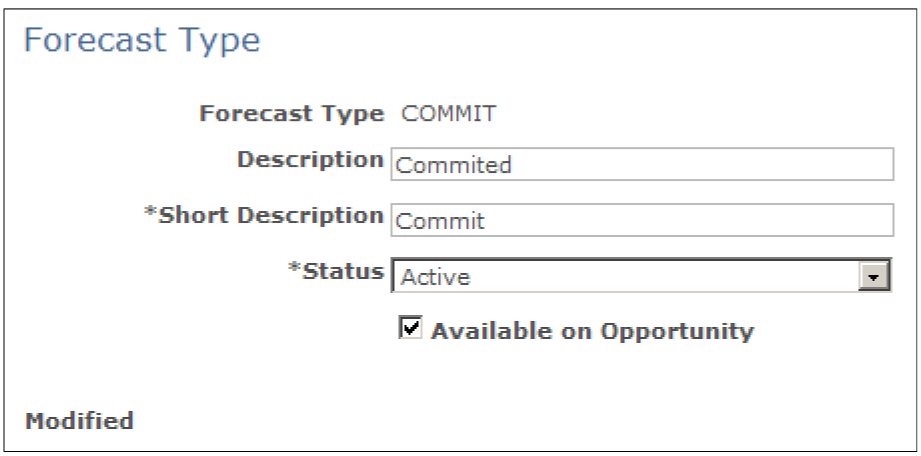
Use the Forecast Type page (RSF_FCAST_TYPE) to define forecast types, which are user-defined classifications.

Navigation

Set Up CRM > Product Related > Sales > Forecast > Forecast Types > Forecast Type

Image: Forecast Type page

This example illustrates the fields and controls on the Forecast Type page.



Use forecast types to categorize opportunity forecast revenue activity according to the business needs. For example, you might define forecast types of *Adjusted, Confirmed, Committed,* and *Open.* Forecast types are not predefined; typically, they vary considerably for different kinds of businesses.

Available on Opportunity	Select to make the forecast type available on the opportunity pages where you define and update opportunities. When this check box is deselected, the forecast type is available only on forecast pages, where it is typically used to categorize types of adjustment activities.

Revenue Type Page

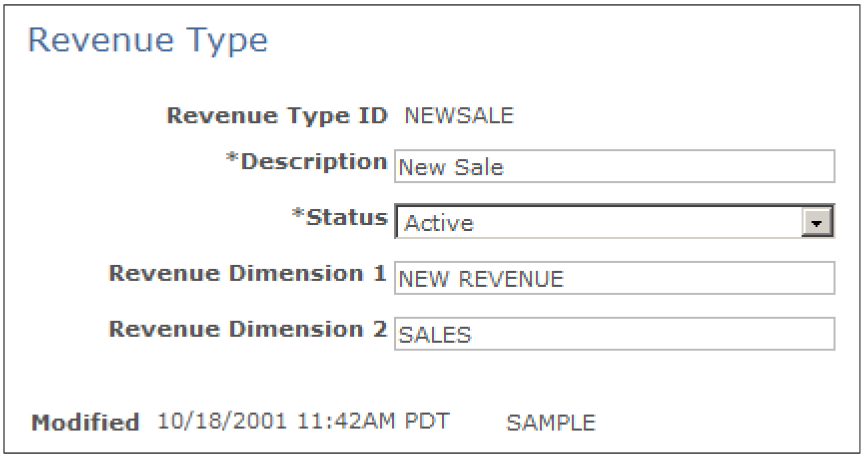
Use the Revenue Type page (RSF_REV_TYPE) to define revenue types.

Navigation

Set Up CRM > Product Related > Sales > Forecast > Revenue Types > Revenue Type

Image: Revenue Type page

This example illustrates the fields and controls on the Revenue Type page.



Revenue Dimension 1 and **Revenue Dimension 2**

Revenue dimensions provide a mechanism for consolidating revenue types to forecast revenue analysis. When many revenue types exist, you can group them by using revenue dimensions.

For example, one dimension might be the type of revenue (for example, *New, Upsell,* or *Repeat*) and the other dimension might be the type of product or service (for example, *License, Warranty,* or *Maintenance*).

- If the revenue type ID is *New License,* you might have dimensions of *New Revenue* and *License.*
- If the revenue type ID is *Warranty Add On,* you might have the dimensions of *Upsell* and *Warranty.*
- If the revenue type is *Renew License,* you might have the dimensions of *Repeat Revenue* and *License.*

When reviewing forecasts, you can generate subtotals for revenue types and revenue dimensions.

Chapter 7

Creating Territory Trees

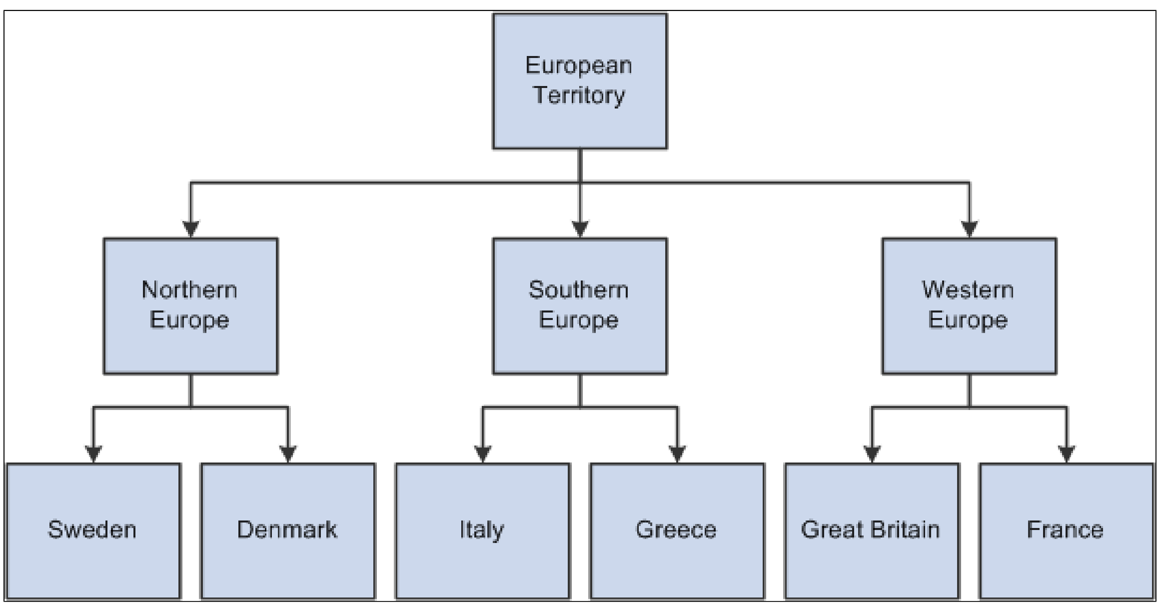
Understanding Territory Trees

A territory tree is a model of the sales structure. The structure of the territory tree depends on how you structure sales activities. A company can segment its sales activities by product lines, geographic regions, customer accounts, industries, or other criteria. A territory in a territory tree represents a segment of the sales activities. Many companies segment their sales geographically. For example, a company might divide a state into a northern region and a southern region, and define a territory for each region. However, a territory does not have to represent a geographic region. If you structure sales activities by industry, three territories might exist in the tree representing, for example, the manufacturing, insurance, and transportation industries.

Territory trees are hierarchical and can contain multiple levels. This diagram shows an example of a territory tree for a European sales organization:

Image: Sample territory tree for a European sales organization

This diagram shows an example of a territory tree for a European sales organization.



PeopleSoft Sales uses territory trees to:

- Assign leads and opportunities to sales representatives.
- Determine users' ability to view leads, opportunities, and forecasts.
- Roll up sales forecasts.

Before the system can use a territory tree to assign leads and opportunities to sales representatives, you must assign at least one sales representative to each territory. Note that you can assign multiple sales representatives to a territory and then have the system select a representative for each lead or opportunity.

In addition, you must define specific values for the assignment criteria of each territory. For example, to have the system assign leads and opportunities to the France territory based on the geographic region, you must specify *Region* as a criteria code and *France* as the criteria value.

See Configuring Assignment Criteria.

To provide a manager with visibility to sales data for a particular territory, you must associate the manager with the territory. When you associate a manager with a territory, the manager can view leads, opportunities, and forecasts for that territory and the territories that are subordinate to the territory. In the preceding example, if a manager is associated with the Western Europe territory, then the manager can view sales data for Western Europe and the territories that Western Europe encompasses—Great Britain and France.

Note: A sales user (such as a manager) must have the proper sales access profile to view other users' data. Before you can create criteria to define a tree, you must set up setIDs and business units, and map them to the PeopleSoft Sales RSF06 tableset record.

Setting up the sales territory tree for the assignment of leads using the criteria of *Region* works only when you define the same Region Code in both the Geography and Territory categories. Geography can be selected as the region code (Category Geographic code) for a customer and Territory is used in Territory tree Criteria definition (Category Territory code).

Related Links

"Defining Business Units and TableSet Controls" (PeopleSoft CRM 9.2: Application Fundamentals)

Creating Territory Trees

To create territory trees, use the Create Territory Tree (RSF_TR_NEW_TREE) component. To manage territory trees, use the Manage Territories (RSF_TR_MANAGER) component. To create or edit territories, use the Territory (RSF_TERRITORY) component.

This topic discusses how to:

- Create trees.
- Define trees.
- Create or edit territories.

Pages Used to Create Territory Trees

Page Name	*Definition Name*	*Usage*
Add Territory Tree Page	RSF_TR_NEW_TREE	Create territory trees.

Page Name	*Definition Name*	*Usage*
Tree Manager Page	PSTREEMGR	Define the hierarchical structure of territory trees.
Territory Definitions Page	RSF_TERRITORY	Define and update territories.

Add Territory Tree Page

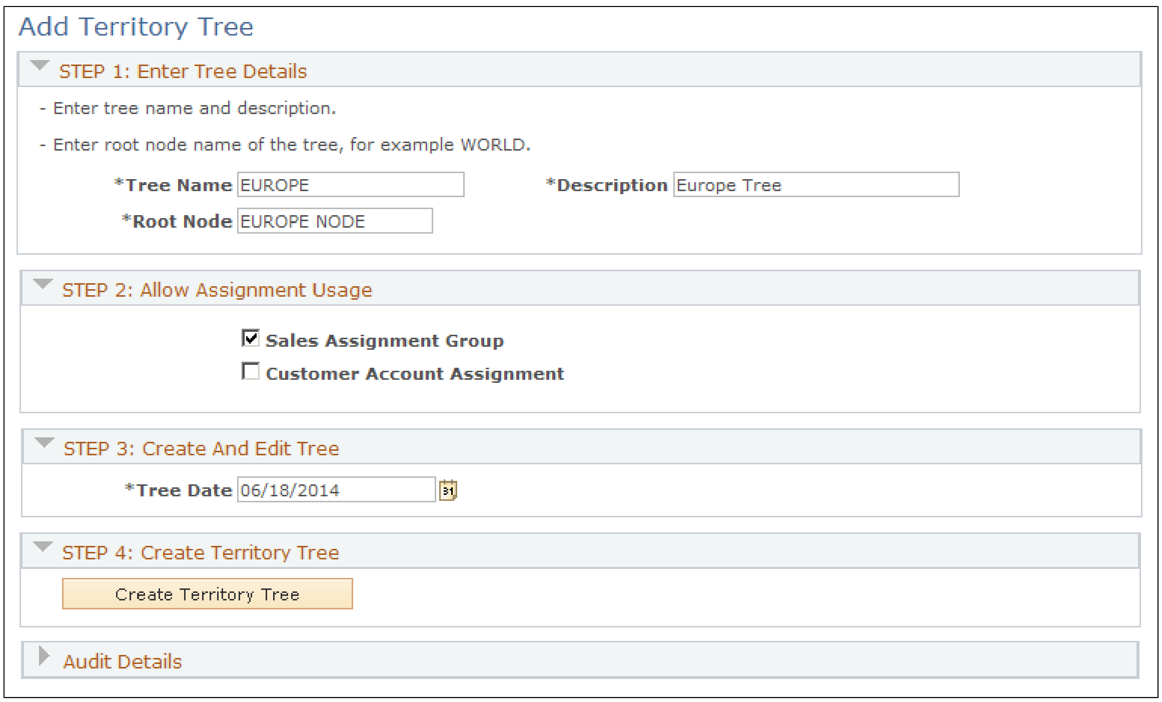
Use the Add Territory Tree page (RSF_TR_NEW_TREE) to create territory trees.

Navigation

Set Up CRM > Product Related > Sales > Territory > Add Territory Tree > Add Territory Tree

Image: Add Territory Tree page

This example illustrates the fields and controls on the Add Territory Tree page.



STEP 1: Enter Tree Details

Enter a tree name, description, and root node (the topmost territory level of the tree).

Tree names and effective dates are especially important when you create multiple trees. You can create two trees with the same name and the same root node; but only if they have different effective dates. You can also create two trees with different names but with the same root node.

For example, you might create one tree with the name of the organization and another tree with the name of a subsidiary. The root node for both trees might be World, because that is the broadest possible territory that each covers. However, if a tree with the same name and same root node already exists with that effective date, the system displays an error message.

STEP 2: Allow Assignment Usage

Sales Assignment Group	Select to enable the system to use the territory tree to assign sales representatives.
Customer Account Assignment	Select to enable the system to use the territory tree to assign account team members.

STEP 3: Create And Edit Tree

Tree Date	Enter the date when the tree becomes effective. Several trees can have the same name as long as they have different effective dates. If you set an effective date in the future, run the Update Sales Access process on or after that date to change territory visibility settings.

STEP 4: Create Territory Tree

Create Territory Tree	Click to access the Tree Manager page to create nodes to add territories to the tree. In PeopleSoft Sales, when you create a node in Tree Manager and click the button with the pencil icon to edit the node, the system displays the Territory Definitions page.

Tree Manager Page

Use the Tree Manager page (PSTREEMGR) to define the hierarchical structure of territory trees.

Navigation

- Click the Create Territory Tree button on the Add Territory Tree page.
- Sales > Manage Territories > Tree Manager
- Tree Manager > Tree Manager > Tree Manager

Image: Tree Manager page

This example illustrates the fields and controls on the Tree Manager page.

Use the Tree Manager page to add nodes and define territories.

Note: After you make changes to a tree, run the Sales Access Update process to apply the changes. The Sales Access Update process updates the access that sales users have in a territory tree and the structure for rolling up forecasts. However, it does not reassign leads or opportunities; use the reorganization or reassignment features of PeopleSoft Sales for that purpose.

Related Links

Reorganizing a Territory Tree

Reassigning a Sales Representative's Leads, Opportunities, and Accounts

Territory Definitions Page

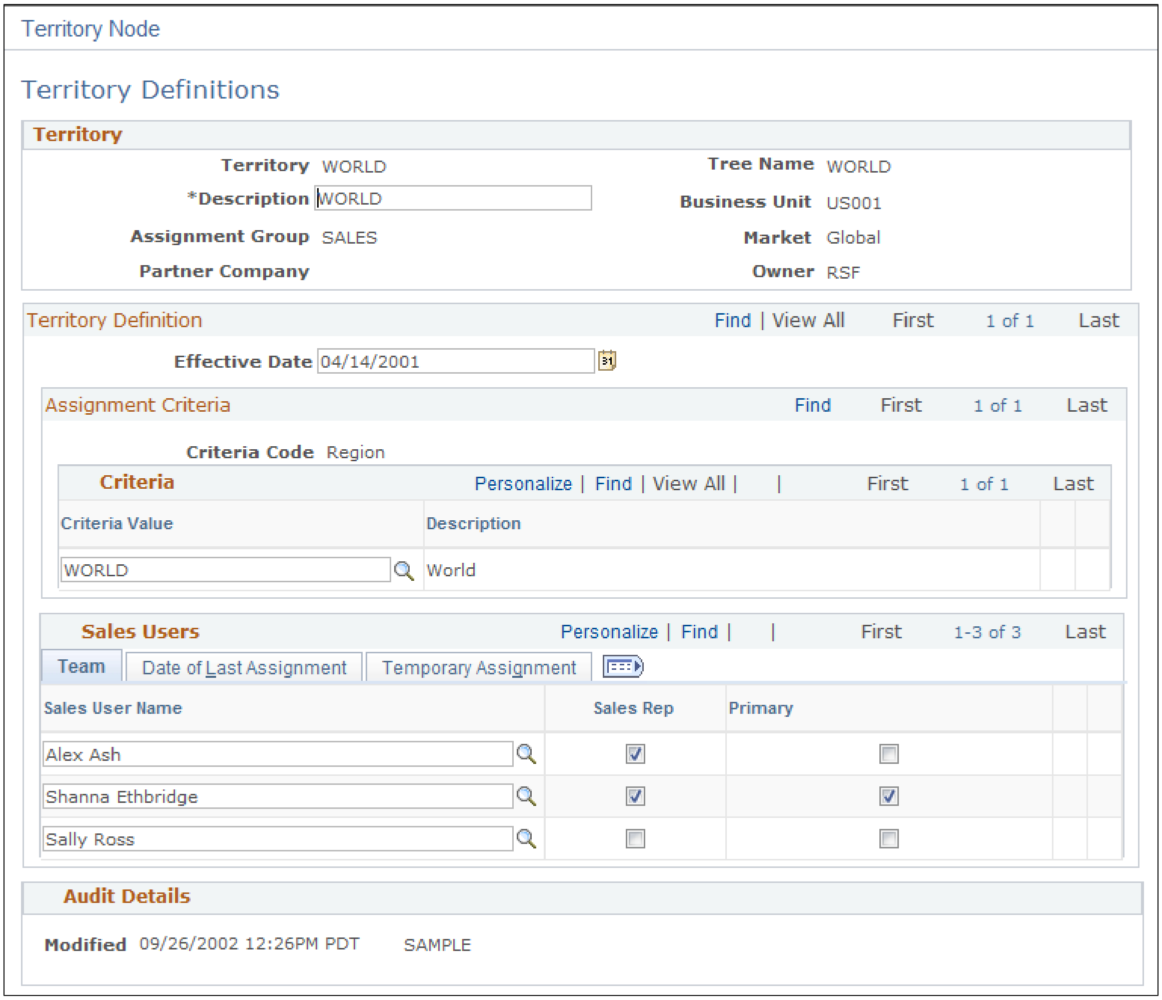
Use the Territory Definitions page (RSF_TERRITORY) to define and update territories.

Navigation

Click the Edit Data button on the Tree Manager page.

Image: Territory Definitions page

This example illustrates the fields and controls on the Territory Definitions page.



Specify assignment criteria to define which leads or opportunities can be assigned to the territory.

Business Unit, Assignment Group, and **Market**	The system displays the business unit, assignment group, and market defined in the User Preferences component for the sales user who created the territory. If the system does not find an assignment group and market for the user, it displays the assignment group and market that are associated with the business unit on the Sales Business Unit Definition page.
Criteria Code	Select the assignment group's criteria (set on the Criteria page) to define which values are assigned to the territory. For example, if the assignment group criteria includes *Customer, Product ID,* and *Lead Source,* you might specify that only *Customer* and *Lead Source* from the lead or opportunity are used to match to this territory.
Criteria Value	Enter values to use for the specified criteria.

For example, if you select the criteria code of *Customer,* you might specify that all leads from the customers *Johnson Brothers, Inc., ABC Corporation,* and *Acme Imports* are assigned to this territory.

If the criteria value permits a range, the From Criteria Value and To Criteria Value fields appear.

Note: Setting up the sales territory tree for the assignment of leads using the criteria of *Region* only works when you define the same Region Code in both the Geography and Territory categories.

From Criteria Value and **To Criteria Value**

Specify the beginning and end of the range of values to accept for the criteria value.

For example, you can select a criteria code of *Product ID.* and specify a criteria value of *0001.* If you also want to accept products with IDs between 0001 and 0099, you would enter a From Criteria Value of *0001* and a To Criteria Value of *0099.*

Sales User Name

Select a sales user to assign to the territory.

Sales Rep (sales representative)

Select to have the system consider the sales user for assignment to a lead or opportunity if the system automatically assigns sales representatives. When a sales user is added to the territory team, the system automatically selects *Sales Rep.* If you don't want the system to assign leads and opportunities to the sales user, deselect this check box.

Note: If you add sales managers or sales administrators to a territory tree to give them visibility to sales representatives' leads and opportunities in the tree, you typically do not select the *Sales Rep* (sales representative) check box. To give a user visibility of other's leads and opportunities, you must assign the data distribution rules *View Leads as Manager* and *View Opportunities as Manager* to the user. You can set up data distribution rules on the Dataset Rules and Dataset Roles pages in the Enterprise Components menu.

See *PeopleSoft 9.1 PeopleBook: Enterprise Components*

Primary

Select to identify a sales user as the primary sales representative for the territory. Each territory can have only one primary sales representative. The system uses this option when the assignment method indicates that items are assigned only to the primary representative.

Note: PeopleSoft Sales has two types of *primary* representatives. One is the primary representative for the lead or opportunity team. The other, specified here, is the primary representative for the territory team.

Assigned TimeStamp

When you click Apply to apply the territory to the tree, the system displays the date and time:

- If the *Sales Rep* check box is selected for a sales user, the system displays the generic date of *01/01/1900* with the time of *12:00:00 AM.*

  This indicates that the sales user was successfully added to the territory but has not been assigned a lead or opportunity. When a lead or opportunity is assigned to the sales representative, the system updates the date and time to reflect when the assignment takes place using the round robin, time assignment method.

- If the *Sales Rep* check box is deselected for a sales user, the system displays no date or time.

  This setting applies to sales users who are administrators, managers, executives, or in similar positions that are not eligible for lead or opportunity assignments but who require visibility to sales data.

Temporary Assignment

If the primary sales user is temporarily unavailable due to vacation or some other reason, you can assign another sales user for a specific time period. For the sales user who is unavailable, enter the following information:

Date From

Enter the beginning date for the temporary assignment.

Date To

Enter the ending date for the temporary assignment.

Assigned To

Select the sales user who is temporarily assigned to the territory during the time period.

Running the Sales Access Update Process

To run the Sales Access Update process, use the Sales Access Update (RSF_ACCESS_RUN) component.

This topic discusses how to run the Sales Access Update process.

When you make changes that affect a tree, territory nodes, or a sales user's visibility of a tree, you must apply the changes and update security by running this process.

Page Used to Run the Sales Access Update Process

Page Name	*Definition Name*	*Usage*
Sales Access Update Page	RSF_ACCESS_RUN	Run the sales access update process to apply changes to a tree.

Sales Access Update Page

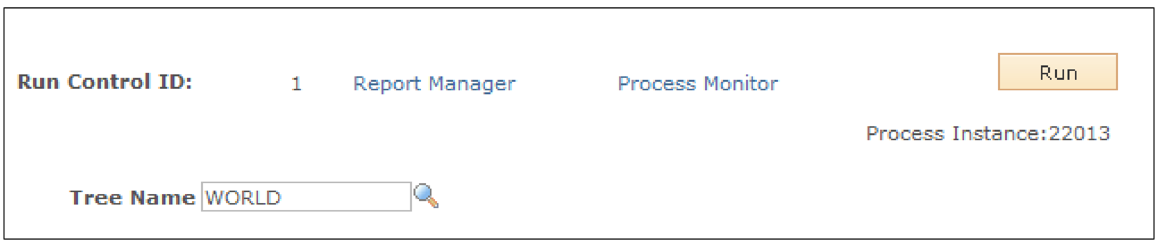
Use the Sales Access Update page (RSF_ACCESS_RUN) to run the sales access update process to apply changes to a tree.

Navigation

Set Up CRM > Product Related > Sales > Security and Personalization > Sales Access Update > Sales Access Update

Image: Sales Access Update page

This example illustrates the fields and controls on the Sales Access Update page.



Select the tree that you want to update in the Tree Name field, and click the Run button.

Chapter 8

Reorganizing or Deleting a Territory Tree

Understanding Tree Reorganization

Occasionally, you may need to change the structure of a territory tree due to a reorganization or expansion of sales activities. For example, you might add or delete territories, or restructure a part of the territory tree. Use the tree reorganization process to make changes to a tree. Typically, you use the reorganization process to clone an existing tree and then make modifications to the new tree. You can give the new tree the same name as the existing tree, as long as you assign it a new effective date. Alternatively, you can give the new tree an entirely different name. You can then view and edit the new tree as needed. The system uses the tree with the most recent effective date as the default tree.

You reorganize territory trees by using the process template provided in the Reorganize Territories component (RSF_TR_REORG). Each step of the process is keyed to the completion of the previous step. Typically, system administrators run the tree reorganization process. Users with branch access to a territory can run the tree reorganization process for the territory. You can give system administrators access to specific branches within a tree.

Note: Branch access is distinct from territory visibility. A PeopleSoft Sales user does not need branch access to access territories within a branch; the user needs only territory visibility.

When you reorganize territory trees, the system enables you to reassign the sales users for leads and opportunities. The reorganization process suggests a new territory and a new primary sales user for each lead or opportunity in a territory that you change or delete. When you clone a tree and make changes, you can generate a worksheet based on these changes so that you can see how the system would reassign the leads and opportunities. You can then override or adjust the changes, select which changes to accept, and then submit them to update the leads and opportunities.

Important! For territory tree reorganization, the assignment of sales representatives to leads and opportunities by the assignment engine is always territory-based.

In addition to the mass reassignment that is integral to reorganizing a tree, at any time you can individually reassign a representative's leads and opportunities to a different sales representative. For example, if the current representative is promoted or otherwise moved out of the sales representative position, that representative's leads and opportunities must be reassigned.

See Reassigning a Sales Representative's Leads, Opportunities, and Accounts.

The worksheets use predefined configurable assignment criteria to suggest the best fit for lead or opportunity reassignment. You might decide not to accept the system's suggestions; at this stage, you can make those changes. The reorganization worksheets are designed for fast performance, and they display a specified number of leads or opportunities.

The setup of the Configurable Search feature for the reorganization component returns a maximum of 300 leads or opportunities per search. The system displays a notification message if more than 300 are found.

You may need to change this setting depending on the number of leads or opportunities that your sales force is handling at the time of reorganization. The system takes longer to present large result sets.

The Personalize Search feature is activated by default. It enables users to save searches and reuse them.

The Configurable Search feature can provide visual prompts about a search result set. At the top of the page, the system displays the criteria on which the result set is based. For example, if the data result set is filtered first by the lead assigned to the current representative (Stu Marx) and then by the new representative (Edward Allen), then this criteria would appear:

- Current Rep = *Marx, Stu Manager* AND
- New Rep = *Allen, Edward*

If you need to assign members of the results set to more than just Edward Allen, you can do so on this page.

Reviewing Reorganizations

This section provides an overview of reorganization review and lists the page used to review reorganizations.

Page Used to View Reorganizations

Page Name	***Definition Name***	***Usage***
Reorganize Sales Activities Page	RSF_TR_REO_SRCH	View a list of submitted territory reorganizations and enter search parameters.

Understanding Reorganization Review

The reorganization ID is one of the search criteria for the reorganization that you are reviewing. Because you might test a variety of structures while planning a reorganization, the system stores the structures under unique IDs. If you exclude the reorganization ID from a search or saved search, the resulting data sets might include information from any of the reorganization structures stored in the system. Always include the reorganization ID in the selected criteria on the Personalize Search page.

Reorganizing a Territory Tree

This topic discusses how to:

- Clone and reorganize a tree.
- Review reorganization worksheets.
- Select the territory team and primary representatives.
- Submit the reorganization.

- View submitted reorganizations.

Pages Used to Reorganize a Territory Tree

Page Name	***Definition Name***	***Usage***
Reorg Territories Page	RSF_TR_REORG	Follow the steps to reorganize territories on a tree.
Tree Manager Page	PSTREEMGR	View or make changes to a territory tree.
Reorg Leads Page	RSF_TR_REORG_LEAD	Review and adjust the system's reassignment of leads in the new structure.
Lead Reorganization - Current Team Page	RSF_TR_LE_TEAM	Review a lead's current team before reorganization.
Lead Reorganization - New Team Page	RSF_TR_REORG_LETM	Review and adjust a lead's new territory team after reorganization, and select the primary representatives.
Reorg Opportunities (reorganize opportunities) Page	RSF_TR_REORG_OPP	Review and adjust the system's reassignment of opportunities in the new structure.
Opportunity Reorganization - Current Team Page	RSF_TR_OP_TEAM	Review an opportunity's current team before reorganization.
Opportunity Reorganization - New Team Page	RSF_TR_REORG_OPTM	Review and adjust an opportunity's new territory team after reorganization, and select the primary representatives.
Reorg Accounts (reorganize accounts) Page	RSF_TR_REORG_ACCT	Review and adjust the system's reassignment of accounts in the new structure.
Account Reorganization - Current Team Page	RSF_TR_ACC_TEAM	Review an account's current team before reorganization.
Account Reorganization - New Team Page	RSF_TR_REORG_ACTM	Review and adjust an opportunity's new territory team after reorganization, and select the primary representatives.
Submit Reorg Page	RSF_TR_SUBMIT	Follow the steps for submitting a territory tree reorganization.
Sales User Page	RSF_SUSER1	View or adjust each sales user's territory accessibility after reorganizing a tree.
Sales Access Update Page	RSF_ACCESS_RUN	Run the Update Sales Access process to update security.
Reorganize Sales Activities Page	RSF_TR_REO_SRCH	View a list of submitted territory reorganizations and enter search parameters.

Reorg Territories Page

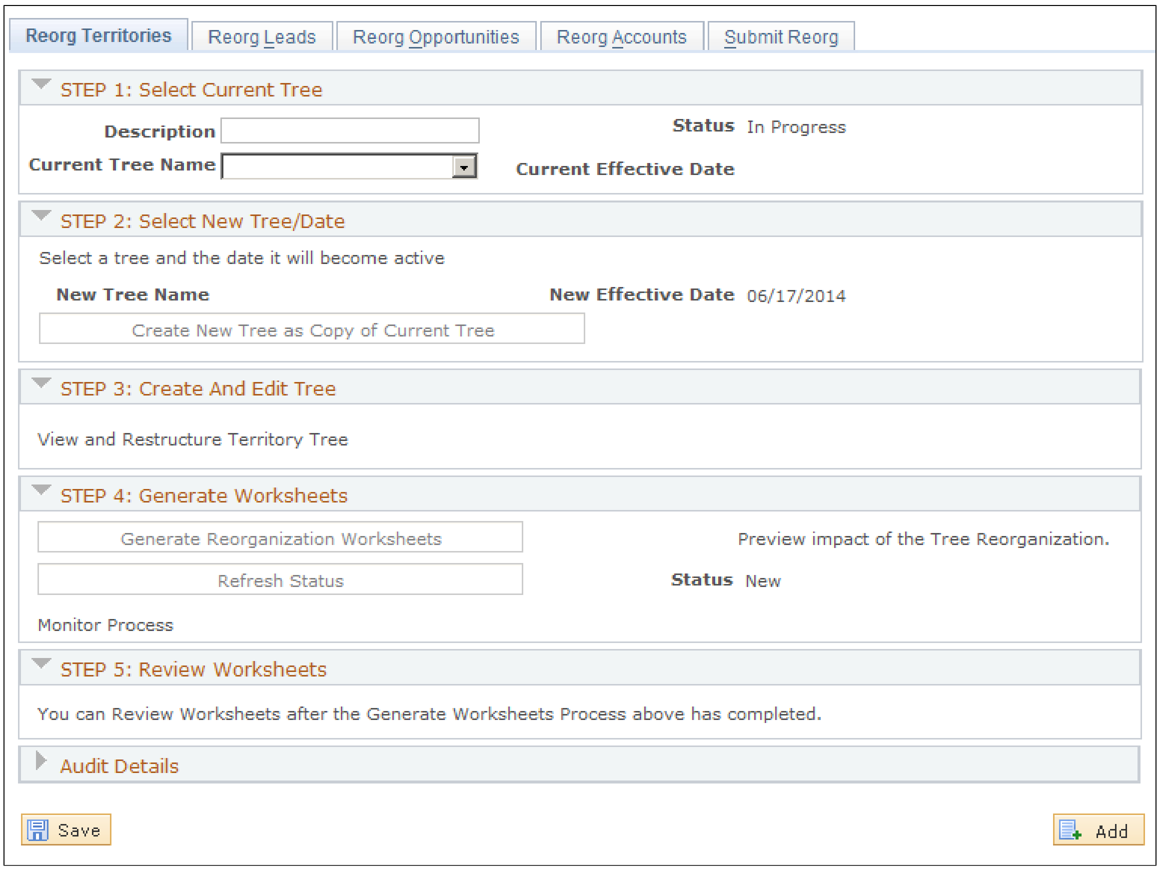
Use the Reorg Territories (reorganize territories) page (RSF_TR_REORG) to follow the steps to reorganize territories on a tree.

Navigation

Sales > Reorganize Territories > Reorg Territories

Image: Reorg Territories page

This example illustrates the fields and controls on the Reorg Territories page.



Note: The links and buttons on this page become available dynamically as you complete the steps.

STEP 1: Select Current Tree

Current Tree Name

Select the tree to clone.

If the sales user is assigned to a single tree, the system displays the name of that tree and makes the field unavailable.

If the sales user is assigned to multiple trees, the tree name is available and the trees to which that user is assigned are available so that the user can select a tree.

Note: Sales users can clone or reorganize only trees to which they are assigned. Sales users can also reorganize only the leads and opportunities of the sales representatives that they can view on the territory tree.
For example, a sales administrator for the Europe tree can reorganize only the Europe tree, and that administrator can view only the European leads and opportunities on the reorganization worksheets.

See Visibility Page.

STEP 2: Select New Tree/Date

New Tree Name

Enter or select the name for the tree that you are creating.

If you have access to multiple trees, you can select from those tree names or enter a new tree name.

New Effective Date

Enter the date on which the new tree becomes effective. The system enters the current date as the effective date, which you can override.

You can enter a future effective date to allow yourself time to reorganize the tree, review the worksheets, and adjust the leads and opportunity assignments for sales representatives to which you have visibility on the new tree.

Create New Tree as Copy of Current Tree

Click to clone the tree specified in the Current Tree Name field in the STEP 1: Select Current Tree group box and name it according to the name specified in the New Tree Name field.

The system copies the tree and makes the View and Restructure Territory Tree link available in the STEP 3: Create and Edit Tree group box.

STEP 3: Create and Edit Tree

View and Restructure Territory Tree

Click to access the Tree Manager page, where you can create new nodes, delete nodes, and make other changes to the cloned tree.

Note: If you delete nodes, be sure to clean up the residual territory data.

See Delete Territory Page.

STEP 4: Generate Worksheets

Run the Tree Reorganization process (RSF_TR_REORG).

Note: Before generating the worksheets, you must specify assignment groups for all accounts that are affected by the reorganization.

Generate Reorganization Worksheets	This button is available only after you complete the previous step. Click to reassign all of your leads and opportunities for the specified new tree and territory definitions, based on the assignment criteria configuration. Worksheets enable you to view how the system reassigned the leads and opportunities based on the criteria. Worksheets also enable you to adjust the assignments, if necessary.
Refresh Status	Click to refresh the status display.
Monitor Process	Click to access the Process List page, where you can identify the status of the reorganization worksheet generation process to determine when it is completed. When it is completed, the next step is available.

STEP 5: Review Worksheets

Review Reorganization Worksheets	Click to review the worksheets that are generated by using the STEP 4: Generate Worksheets group box. You must review the lead, opportunity, and account reorganization worksheets in order. The Next button on each worksheet is programmed to move you to the next worksheet.

Reorg Leads Page

Use the Reorg Leads (reorganize leads) page (RSF_TR_REORG_LEAD) to review and adjust the system's reassignment of leads in the new structure.

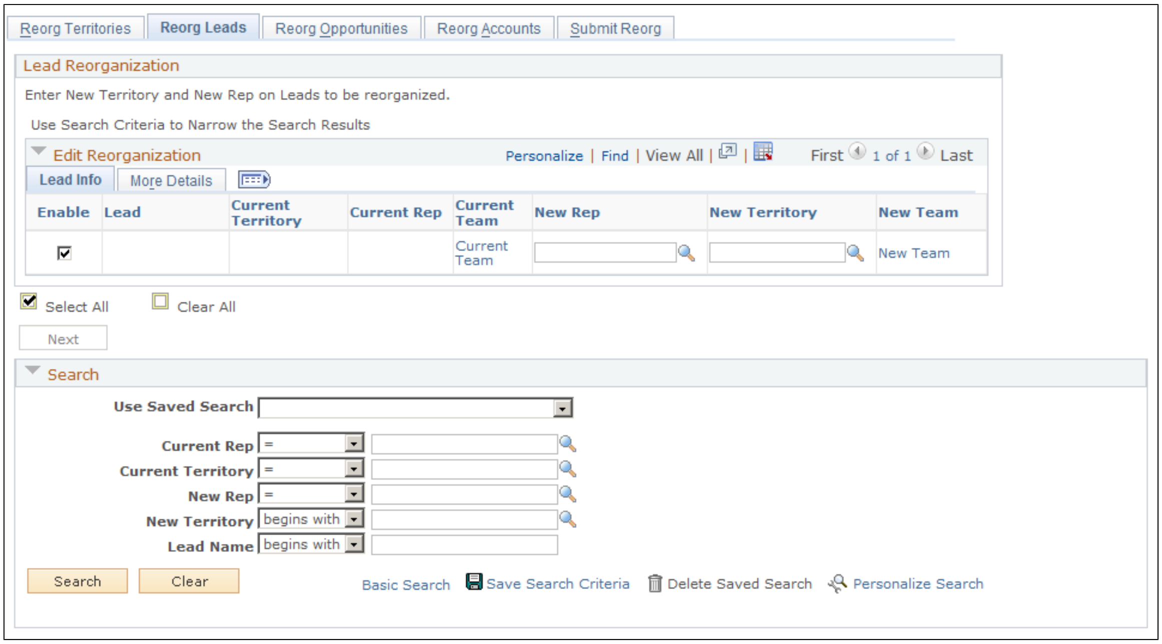
Navigation

Sales > Reorganize Territories > Reorg Leads

Note: This example shows the Reorg Leads page. The Reorg Opportunities and Reorg Account pages are similar in appearance and usage.

Image: Reorg Leads page

This example illustrates the fields and controls on the Reorg Leads page.



Review the results of the system's reassignment of leads, opportunities or accounts in the new tree structure. Select new representatives to assign the items, if necessary.

Enable

Select each reassignment that you want to accept.

Current Team

Click to access the Lead Reorganization - Current Team, Opportunity Reorganization - Current Team, or Account Reorganization - Current Team page, where you can view the current team for the lead, opportunity, or account before reorganization. Viewing this page enables you to determine the changes that are required.

New Team

Click to access the Lead Reorganization - New Team, Opportunity Reorganization - New Team, or Account Reorganization - New Team page, where you can view the new team for the lead, opportunity, or account after reorganization. Viewing this page enables you to identify the sales representatives to add to the sales team. You can also use these pages to select the primary representative.

Click OK for the system to update the new primary representative from this page to the leads, opportunities, or accounts.

Next

Click to access the Submit Reorg page, where you can click Submit Reorganization to complete the reassignments.

Search

You can filter the search criteria to limit the information that appears on each worksheet. The delivered Configurable Search feature for territory tree reorganization enables you to filter searches based on the Current Rep, Current Territory, New Rep, New Territory, and Lead or Opportunity fields. Filtering a search based on these fields provides a focused set of leads and opportunities to review.

The Current Rep and Current Territory prompt values are based on the current tree. The Current Rep prompt values list the representatives who report directly to the manager or administrator responsible for processing reorganization. The New Rep and New Territory prompt values are based on the new tree. The New Rep prompt values enable a manager to assign leads and opportunities to representatives who might not be direct reports of that particular manager.

Lead Reorganization - New Team Page

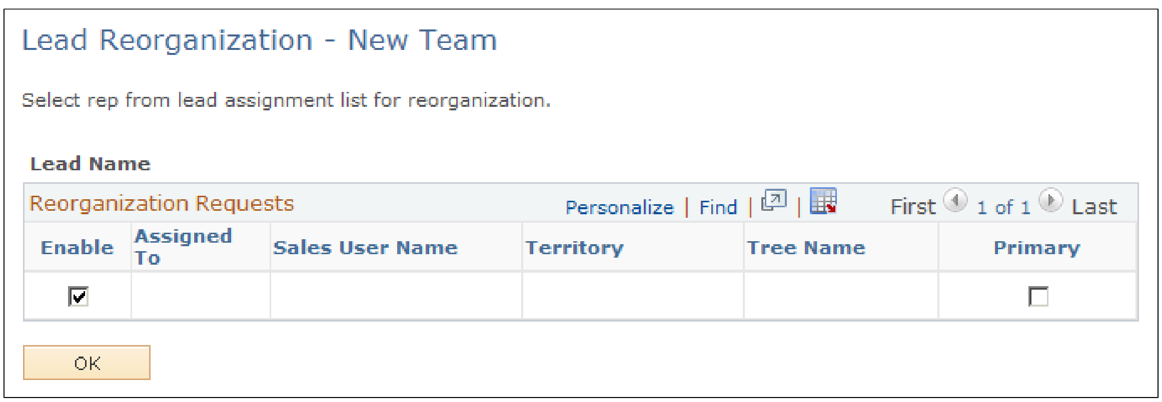
Use the Lead Reorganization - New Team page (RSF_TR_REORG_LETM) to review and adjust a lead's new territory team after reorganization, and select the primary representatives.

Navigation

Click the New Team link on the Reorg Leads page.

Image: Lead Reorganization - New Team page

This example illustrates the fields and controls on the Lead Reorganization - New Team page.



The Lead, Opportunity, and Account Reorganization - Current Team pages have a similar format to the New Team pages, but they are read-only.

Enable	Select a check box for each member that you want to retain on the new team after the reorganization.
Primary	Select to specify the primary sales representative for each territory. This column appears on the Lead Reorganization - Current Team, Lead Reorganization - New Team, Opportunity Reorganization - Current Team, and Opportunity Reorganization - New Team pages.
Owner	Select to specify the account owner or owners. This column appears on the Account Reorganization - Current Team and Account Reorganization - New Team page.

Submit Reorg Page

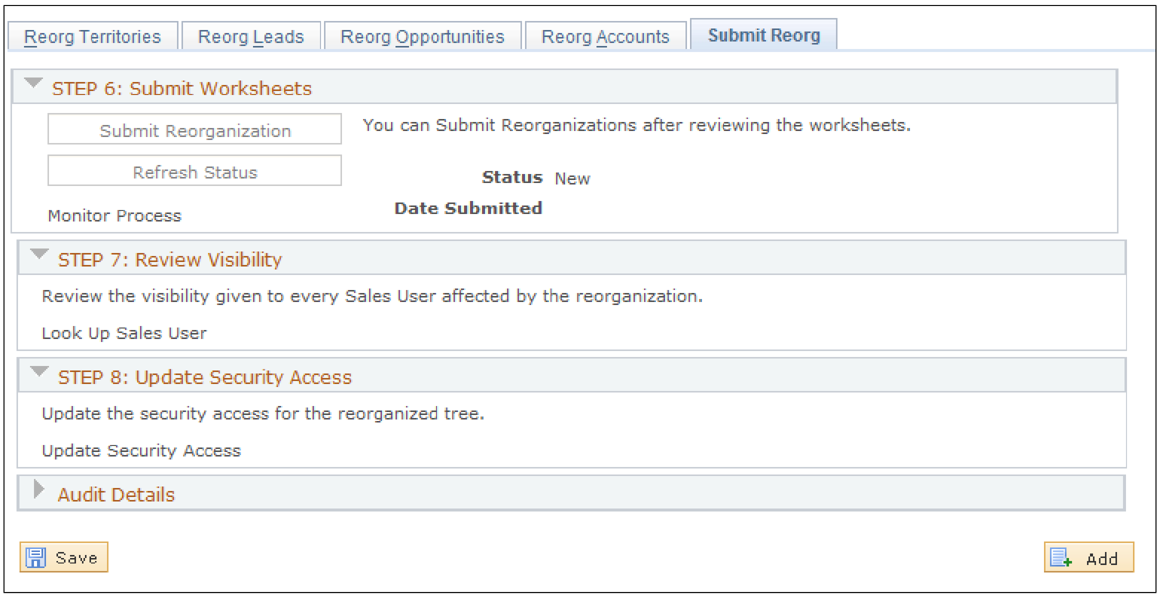
Use the Submit Reorg (submit reorganization) page (RSF_TR_SUBMIT) to follow the steps for submitting a territory tree reorganization.

Navigation

Sales > Reorganize Territories > Submit Reorg

Image: Submit Reorg page

This example illustrates the fields and controls on the Submit Reorg page.



STEP 6: Submit Worksheets

Submit Reorganization	Click to apply the reorganizations from the worksheet to the leads, opportunities, and accounts by updating the new territory and sales representatives.

STEP 7: Review Visibility

Look Up Sales User	Click to access the Sales User page for each sales user affected by the reorganization. View or adjust the user's territory visibility settings.

STEP 8: Update Security Access

Update Security Access	Click to access the Sales Access Update page, where you can run the process to apply the changes and update the security settings.

Reorganize Sales Activities Page

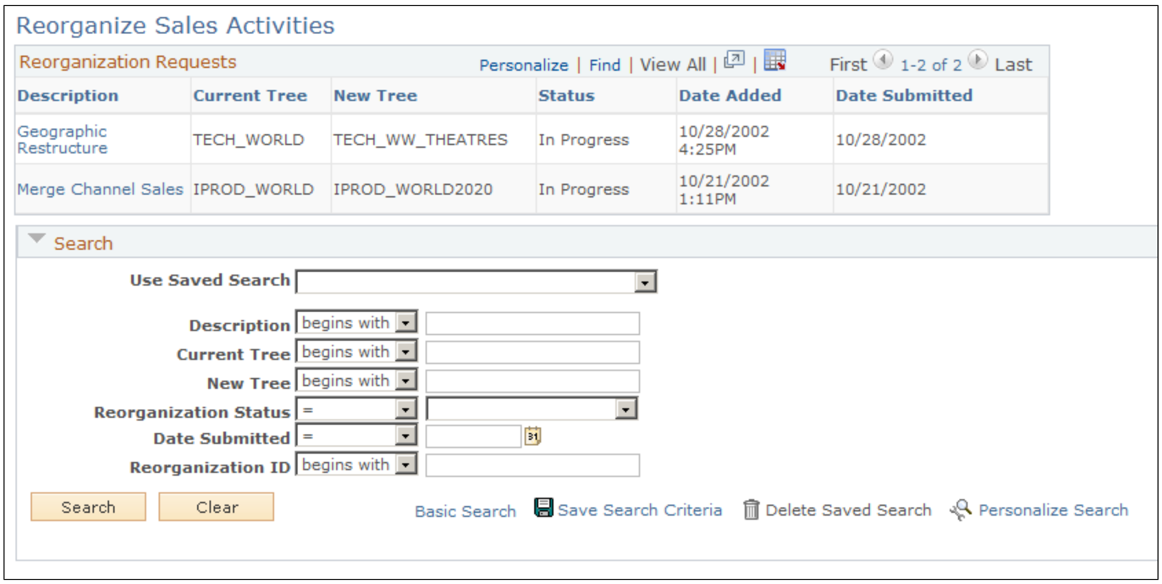
Use the Reorganize Sales Activities page (RSF_TR_REO_SRCH) to view a list of submitted territory reorganizations and enter search parameters.

Navigation

Sales > Search Reorganizations > Reorganize Sales Activities

Image: Reorganize Sales Activities page

This example illustrates the fields and controls on the Reorganize Sales Activities page.



The reorganization ID is one of the search criteria for the reorganizations that are listed on this page. Because you might test a variety of structures while planning a reorganization, the system stores the structures under unique IDs. If you exclude the reorganization ID from a search or saved search, the resulting data sets might include information from any of the reorganization structures stored in the system. Always include the reorganization ID in the selected criteria on the Personalize Search page for this search.

Deleting Trees or Tree Nodes

This topic discusses how to:

- Use Tree Manager to delete tree items.
- Delete residual territory definitions from PeopleSoft Sales.

Note: Be extremely cautious about deleting an entire tree. Generally, you delete an entire tree only if it is a draft that you created while practicing tree setup.

Pages Used to Delete Trees or Tree Nodes

Page Name	***Definition Name***	***Usage***
Using Tree Manager to Delete Tree Items	PSTREEMAINT	Delete a tree.
Tree Structure Maintenance	PSTREESTRCMAINT	Delete tree nodes.
Delete Territory Page	RSF_TR_DEL_TREE	Delete residual tree and territory data from the application after deleting trees or nodes in Tree Manager.

Using Tree Manager to Delete Tree Items

Access the Tree Maintenance (Tree Manager, Tree Utilities, Copy/Delete Tree, Tree Maintenance) and Tree Structure Maintenance (Tree Manager, Tree Utilities, Copy/Delete Tree, Tree Structure Maintenance) pages in Tree Manager.

See *PeopleTools: Tree Manager* product documentation.

Using Tree Manager, you can delete nodes from a tree or delete an entire tree. Tree Manager does not, however, delete the territory data associated with trees or nodes across applications. This residual territory data still exists in PeopleSoft Sales and can be included in prompt lists as if actively assigned to a tree. For example, you might delete the node for the Western territory, but the Western territory and its data still exist. You must delete this residual territory data from PeopleSoft Sales by using the Delete Territory page.

Delete Territory Page

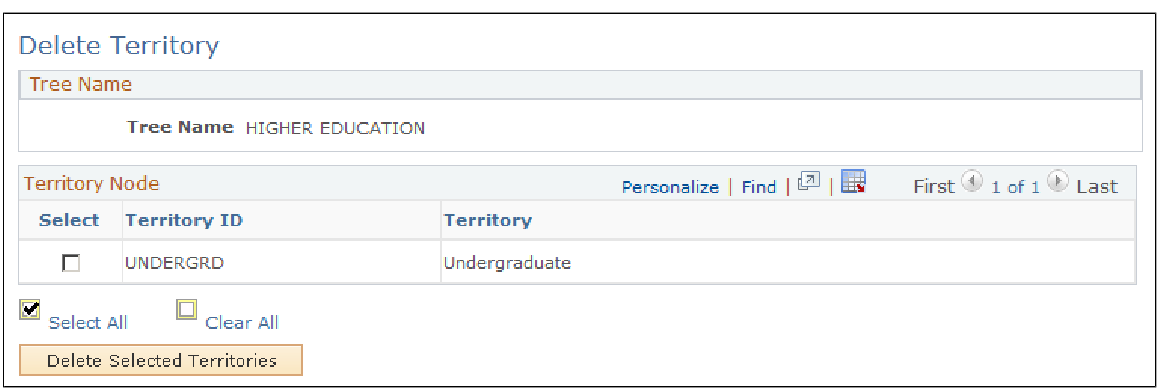
Use the Delete Territory page (RSF_TR_DEL_TREE) to delete residual tree and territory data from the application after deleting trees or nodes in Tree Manager.

Navigation

Set Up CRM > Product Related > Sales > Territory > Delete Territory > Delete Territory

Image: Delete Territory page

This example illustrates the fields and controls on the Delete Territory page.



All territories that are deleted from a tree in PeopleSoft PeopleTools are listed on this page. Deleted territories are no longer used for visibility or assignment. Use this page to delete residual territory data from PeopleSoft Sales.

Select	Select the territory tree or node for which you want to delete residual data.
Delete Selected Territories	When you click this button, the system prompts you to confirm the deletion of residual data for the selected items. If you proceed, the system deletes the selected items and returns you to the Delete Territory page, which lists any territories that still exist for the tree.

Chapter 9

Configuring Assignment Criteria

Understanding Assignment Groups

An assignment group contains the criteria that the system uses to determine how to assign sales representatives to a lead or opportunity. After you create an assignment group, you can set up the system to automatically associate the assignment group with territory trees that you define by specifying assignment group in the Sales Users component or at the business unit level. When a sales user adds a lead or opportunity and clicks the Assign Sales Rep button, the system uses the assignment group that is associated with the territory tree to select the sales representative and team. The system uses the following steps:

1. It selects one or more appropriate territories by evaluating the lead or opportunity.

   The system bases this evaluation on user-defined criteria and weights entered for the assignment group. The criteria might include the customer, product, region, and industry. The system uses these criteria and weights to generate a score for each territory.

2. If you specify manual selection on the assignment group, the system allows the user to choose a sales representative or team from a list that contains representatives or teams from the selected territories only.

3. If you specify automatic selection on the assignment group, the system evaluates the user-defined options for the assignment group to assign a sales representative or team from the selected territories.

This diagram illustrates the possible assignment configurations that you can enter for an assignment group:

Image: Sample Assignment configuration combinations

This diagram illustrates the possible assignment configurations that you can enter for an assignment group

Assignment Configurations					Business Unit Restriction?	
					Yes	No
Single Territory	Single Rep		Automatic	Primary Rep		
				Round Robin - Time		
				Round Robin - Availability		
			Manual Selection			
	Whole Team		Automatic			
			Manual Selection			
Multiple Territory	Single Team	Single Rep	Automatic	Round Robin - Time		
				Round Robin - Availability		
			Manual Selection			
		Whole Team	Automatic	Round Robin - Time		
				Round Robin - Availability		
			Manual Selection			
	All Teams	Single Rep	Automatic	Primary Rep		
				Round Robin - Time		
				Round Robin - Availability		
			Manual Selection			
		Whole Team	Automatic			
			Manual Selection			

The following examples show how the system assigns the sales representative if you use the following assignment group settings:

- *Multiple Territory:* Search the tree to find the territories to which the sales representative is assigned.

  The two territories that most closely match the matching criteria are searched.

- *All Teams:* Within each territory in the two top-weighted territories, the system identifies all sales representatives assigned.

- *Single Rep:* From each territory team, the system lists only one representative.

- *Primary Rep:* The primary representative from each top-weighted territory is selected.

  The system then identifies only the first representative in the list of possible primary representatives as the primary representative for the lead or opportunity team.

- *No Business Unit Restriction:* The system assigns the item to the primary representative who, because no restriction exists, might or might not be in the same business unit as the current sales representative.

See Configuring Assignment Criteria.

Consider a single tree for which the system determines the territories that are best suited to receive the assignment, based on the defined criteria and weights. The system finds the most suitable single representative or whole team by using the specified methods.

This table lists the data in the system and the criteria that the system uses to select the most suitable territories for the assignment:

Territory	Total Weight	Product	Weight	Region	Weight	Industry	Weight
Western	9	Freezers	5	West	4		
Eastern	5	Refrigerators	5				
Northern	3					Computers	3

Territory

- For a single territory, the system selects *Western* because, with a total weight of 9, it is the highest weighted territory.
- For multiple territories, by default the system uses the two best suited territories, but you can increase the number of territories. Assume that the system uses the default number of territories. In this case, the system selects the territories of *Western,* with a total weight of 9, and *Eastern,* with a total weight of 5.

Note: For multiple territories, you can have the system search within a single team (group of sales representatives in a given territory) in each territory that matches the assignment criteria with the highest total weight, or you can have the system search within all teams or groups of sales representatives associated to multiple territories that matched the assignment criteria with the highest total weight.

In the single-territory scenario, the system uses the *Western* territory data, as described in the following table, to select the most suitable single representative or whole team within that territory:

Territory	Sales Representative	Last Assigned Date	Availability Count	Primary in Team?
Western	ABC	6/1/2002	10	Yes
Western	LMN	5/1/2002	2	No
Western	XYZ	4/1/2002	8	No

Based on the modes and options specified, the system returns the following values:

Automatic Assignment

For each option in the automatic assignment mode, the system returns the following values:

- Primary Rep: The system selects *ABC* because this representative is designated as the primary team member.
- Round Robin, Time: The system selects *XYZ* because, with a last-assigned date of April 1, 2002, this representative has waited the longest without a new assignment.
- Round Robin, Availability: The system selects *LMN* because, with only two leads, this representative has the highest availability.

Manual Assignment

The system finds the single territory of *Western* as well as its sales representatives—*ABC, LMN,* and *XYZ.*

Select the sales representatives to assign.

Here is another example. Consider a tree on which territories overlap. The system determines which territories in the territory tree are most suited based on common factors and the defined criteria and weights. It also finds the most suitable single representative or whole team using the specified methods.

This table lists the data in the system and the criteria from which the system must select the matrix territory most suitable for the assignment:

Territory	Total Weight	Product	Weight	Region	Weight	Industry	Weight
Osborne Western	9	Pianos	5	West	4		
Osborne Trucking	7	Pianos	5			Trucking	2
Trucking	2					Trucking	2

Territory

The system selects *Osborne Western* and *Osborne Trucking* because these are the highest weighted territories with common factors. Together, they form the matrix organization of *Osborne* and the matrix product of *Pianos.*

The system then uses the matrix territory data, which is listed in this table, to select the most suitable single representative or whole team within the territory:

Territory	Sales Representative	Last Assigned Date	Availability Count	Primary in Team?
Osborne Western	A	6/1/2002	2	Yes
Osborne Western	B	5/1/2002	1	No

Territory	***Sales Representative***	***Last Assigned Date***	***Availability Count***	***Primary in Team?***
Osborne Trucking	AA	5/1/2002	8	Yes
Osborne Trucking	BB	5/16/2002	6	No

The system must review all teams in the multiple territories. Based on the specified modes and options, the system returns values.

Return Search Results for

For the automatic assignment mode, the system returns the following values for each option:

- Single Rep: The system selects one candidate for each team.

  The system selects *A* and *AA* because these are designated as the primary team members for each territory.

  - Primary Rep: The system selects *A* as the primary matrix team member because this representative is the first in the list.
  - Round Robin, Time: The system selects *B* and *AA* because these representatives have waited the longest on their teams without a new assignment.
  - Round Robin, Availability: The system selects *B* and *BB* because these representatives have the least number of assignments on their teams and, therefore, have the highest availability.

- Whole Team: The system selects the whole team from each territory.

  The system selects *A, B, AA,* and *BB.* It adds the whole team to the lead's sales team and selects *A,* the first representative in the list, as the primary sales representative for the sales team.

Manual Assignment

The system finds the multiple territories of *Osborne Western* and *Osborne Trucking,* as well as all members of each team—*A, B, AA,* and *BB.* Select the sales representatives to add to the sales team, and select the primary sales team representative. You can have only one primary.

Configuring Assignment Criteria

To configure assignment groups, use the Configure Assignment Groups (RSF_ASSIGN_CONFIG) component.

This topic discusses how to:

- Create assignment groups.
- Identify component records.
- Define criteria and their weights.

Pages Used to Configure Assignment Criteria

Page Name	***Definition Name***	***Usage***
Assign Group Page	RSF_ASSIGN_GROUP	Identify parameters for assigning leads or opportunities within a specified group.
Component Records Page	RSF_ASSIGN_RECS	Identify components for defining a tree and its territories, and define records and fields for the round robin assignment method.
Criteria Page	RSF_ASSIGN_CRIT	Identify weighted search and match criteria to find candidates for assignment.
Component	RSF_ASSIGN_COMP	Determine which components use the specified field.

Assign Group Page

Use the Assign Group page (RSF_ASSIGN_GROUP) to identify parameters for assigning leads or opportunities within a specified group.

Navigation

Set Up CRM > Product Related > Sales > Territory > Configure Assignment Groups > Assign Group

Image: Assign Group page (1 of 2)

This example illustrates the fields and controls on the Assign Group page (1 of 2).

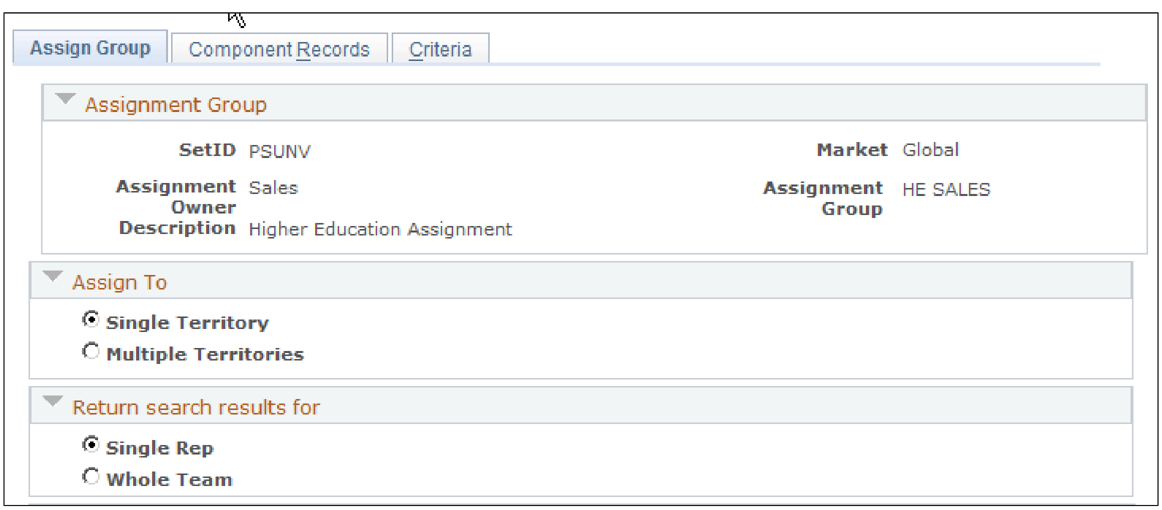
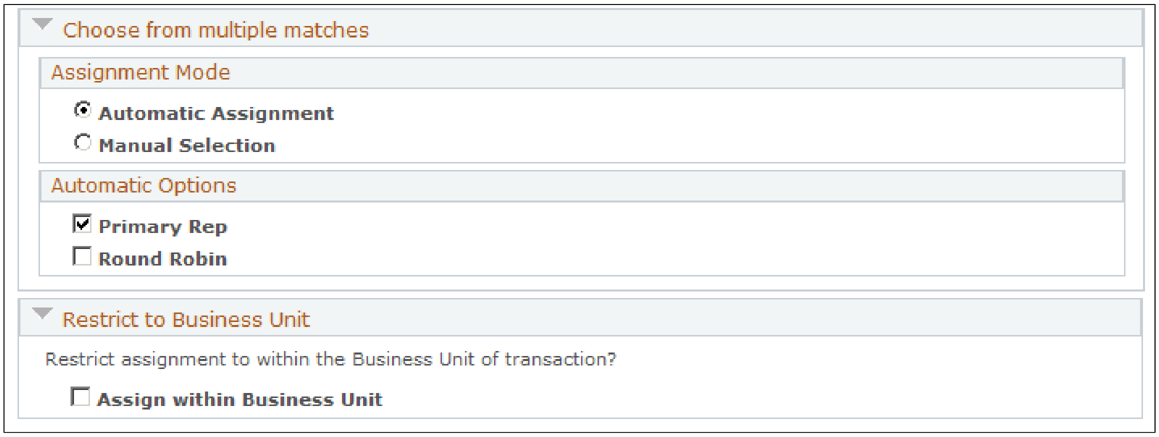


Image: Assign Group page (2 of 2)

This example illustrates the fields and controls on the Assign Group page (2 of 2).



Assignment Group

Assignment Owner

Select an owner for the assignment group:

- Select *Sales* if you use the assignment group to assign sales representatives to leads and opportunities.
- Select *Account Management* if you use the assignment group to assign sales representatives to accounts.

If you select *Account Management,* the system sets the following defaults and makes the fields unavailable for editing:

- Assign To: *Single Territory*.
- Return search results for: *Whole Team*.

Assign To

Single Territory

Select to have the system assign sales representatives or teams in the single top-weighted territory.

Multiple Territories

Select to have the system assign sales representatives or teams in multiple top-weighted territories.

How Many?

If you select *Multiple Territories*, enter the number of territories to search.

Single Team or **All Teams**

If you select *Multiple Territories*, you can select Single Team to assign representatives only from within the single team that best fits the assign criteria, or you can select All Teams to assign representatives from within all teams that match the assignment criteria.

If you select Multiple Territories, the system selects All Teams by default. You can override this setting.

Return search results for

Single Rep (single representative) — Select to make the assignment to a single territory team member of the specified territory.

Whole Team — Select to make the assignment to all territory team members of the specified territory.

Note: PeopleSoft Sales uses territory teams, sales teams, account teams, and lead or opportunity teams. The territory team, which is the team that you use here, is the group of individual sales users who are assigned to a territory.

Choose from multiple matches

Use the Assignment Mode group box to select the assignment mode.

Automatic Assignment — Select to allow the system to assign leads or opportunities within the assignment group.

When you select this option, the Automatic Options group box becomes available.

Manual Selection — Select to enable sales users to assign leads or opportunities manually within the assignment group.

When you select this option, search results are listed as candidates for assignment when the user clicks the Find Sales Rep (find sales representative) button on the Lead - Assign or Opportunity - Assign page.

Note: To enable sales users to assign sales representatives manually to leads or opportunities, you must select the Manual Selection check box, and select the Manually Reassign Leads, Manually Reassign Opportunities, and the assignment group Manual Selection check boxes on the Sales Access profile.

Use the Automatic Options group box to evaluate multiple matches automatically to narrow the selections to a single representative. This area is unavailable if you select any of these options:

- Manual Selection.
- Single Territory and Whole Team.
- Multiple Territories, All Teams, and Whole Team.

Primary Rep (primary representative) — Select to have the system evaluate the territory team and select only the team member who is designated as the primary member on the Territory page.

Round Robin and **Time** or **Availability** — Select to have the system evaluate the territory teams to select candidates based on either time or availability parameters. Select:

- Time to identify the sales representatives who have waited the longest without a recent assignment, according to the record and field set on the Round Robin - Last Assigned tab on the Component Records page and the time stamp on the Territory Definitions page.
- Availability to identify, according to the record and field set on the Round Robin - Availability tab on the Component Records page, the representatives who have the least number of leads or opportunities assigned to them with the following status:
  - For leads, the status of *New, Open, Accepted, Referred, Imported, Working, Converted to Opportunity, Rejected, Deferred* or *Turnback.*
  - For opportunities, the status of *Open.*

Restrict to Business Unit

Assign within Business Unit — Select to permit assignments only to sales representatives in the same business unit as the business unit to which the lead or opportunity belongs.

Component Records Page

Use the Component Records page (RSF_ASSIGN_RECS) to identify components for defining a tree and its territories, and define records and fields for the round robin assignment method.

Navigation

Set Up CRM > Product Related > Sales > Territory > Configure Assignment Groups > Component Records

Image: Component Records page: Components tab

This example illustrates the fields and controls on the Component Records page: Components tab.

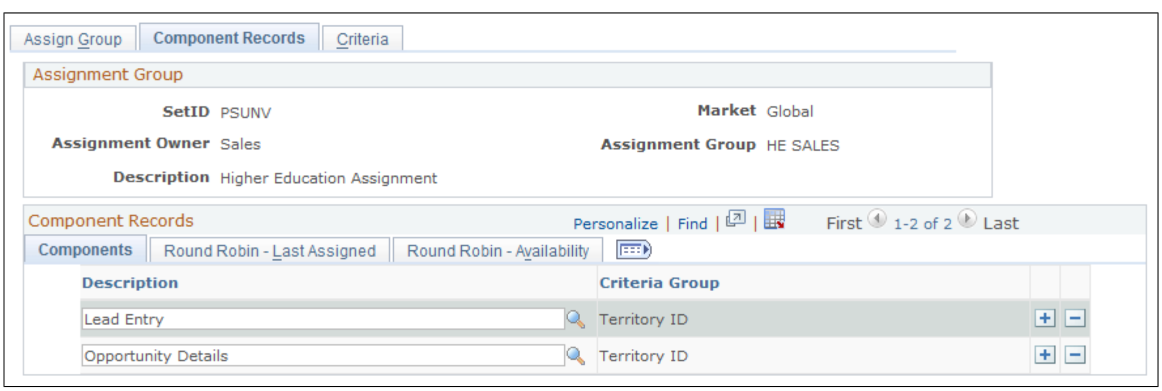


Image: Component Records page: Round Robin - Last Assigned tab

This example illustrates the fields and controls on the Component Records page: Round Robin - Last Assigned tab.

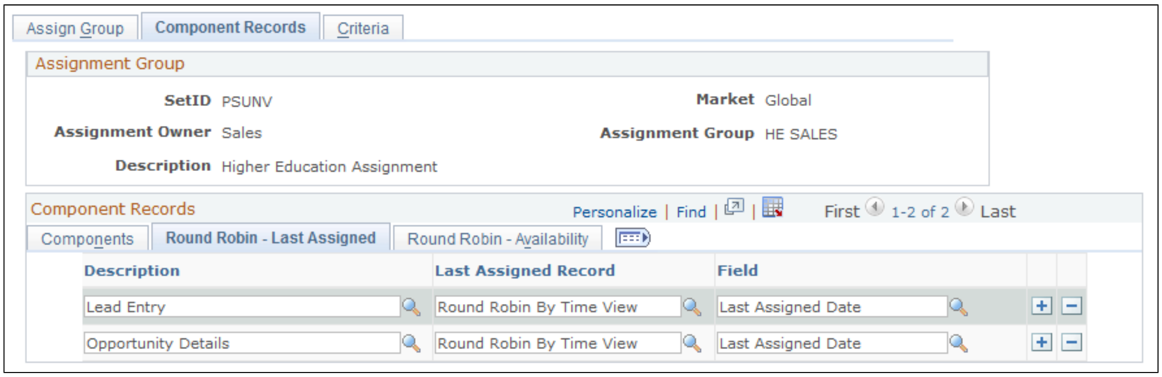
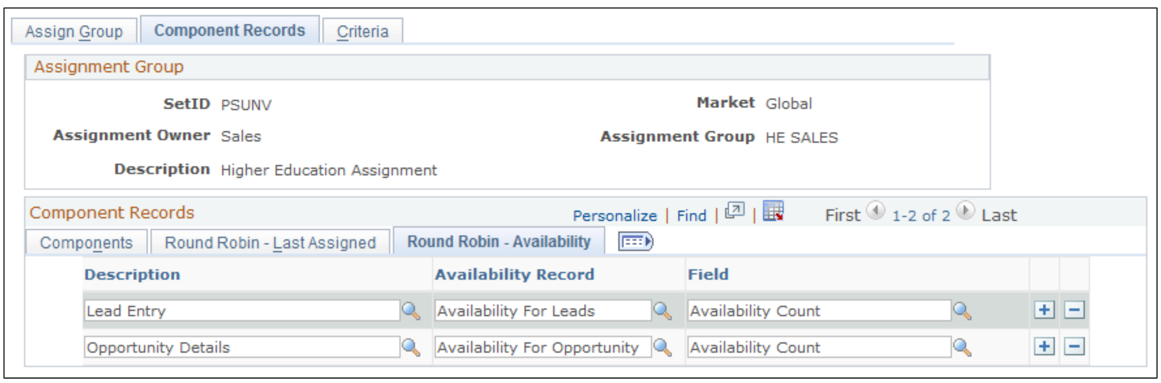


Image: Component Records page: Round Robin - Availability tab

This example illustrates the fields and controls on the Component Records page: Round Robin - Availability tab.



Components Tab

Description	Enter the components to use for the assignment group. The components that you enter appear on the Round Robin - Last Assigned and Round Robin - Availability tabs, and they populate the Components field on the Criteria page.

Round Robin - Last Assigned Tab

Last Assigned Record and **Field**	Enter the record and field to use in the specified component to determine which representative has waited the longest without a recent assignment. The last-assigned date in the Lead Entry and Opportunity Details components is used in the Round Robin - Time assignment method. The time stamp on the Territory Definitions page is initially set to *01/02/1000,* and it is updated each time that a sales user is assigned to the territory and each time that a lead or opportunity is assigned to that individual.

See Territory Definitions Page.

Round Robin - Availability Tab

Availability Record and **Field** — The system counts the available leads and opportunities. Enter the record and field for the system to use (from the specified component) to determine which representatives have the least number of leads or opportunities assigned to them.

Criteria Page

Use the Criteria page (RSF_ASSIGN_CRIT) to identify weighted search and match criteria to find candidates for assignment.

Navigation

Set Up CRM > Product Related > Sales > Territory > Configure Assignment Groups > Criteria

Image: Criteria page: Details tab

This example illustrates the fields and controls on the Criteria page: Details tab.

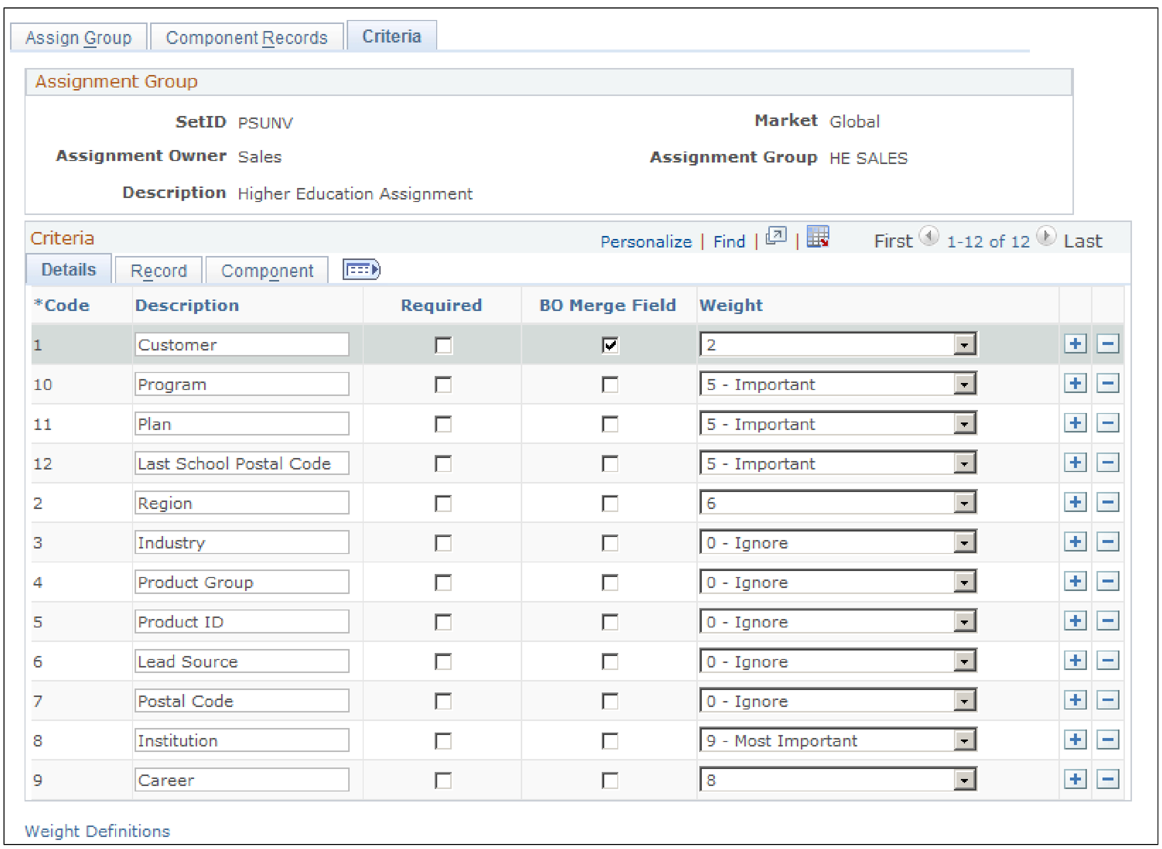


Image: Criteria page: Record tab

This example illustrates the fields and controls on the Criteria page: Record tab.

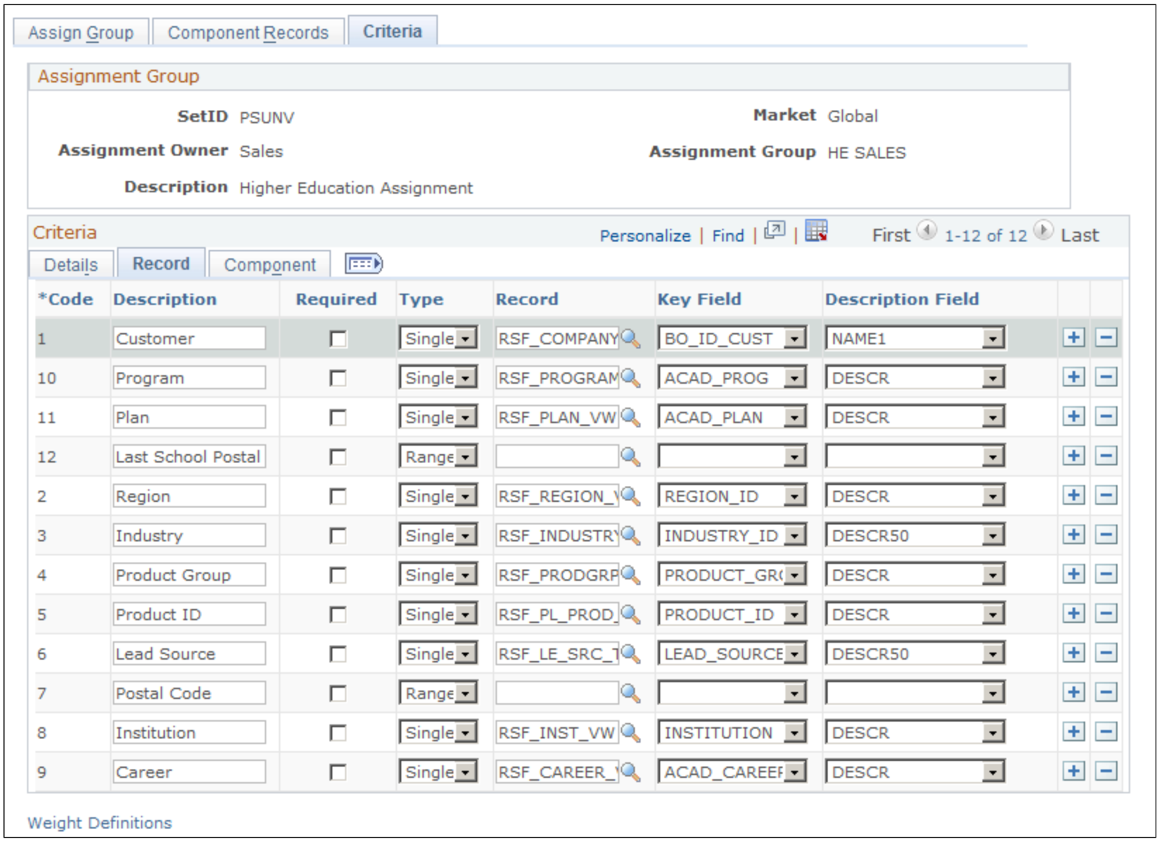
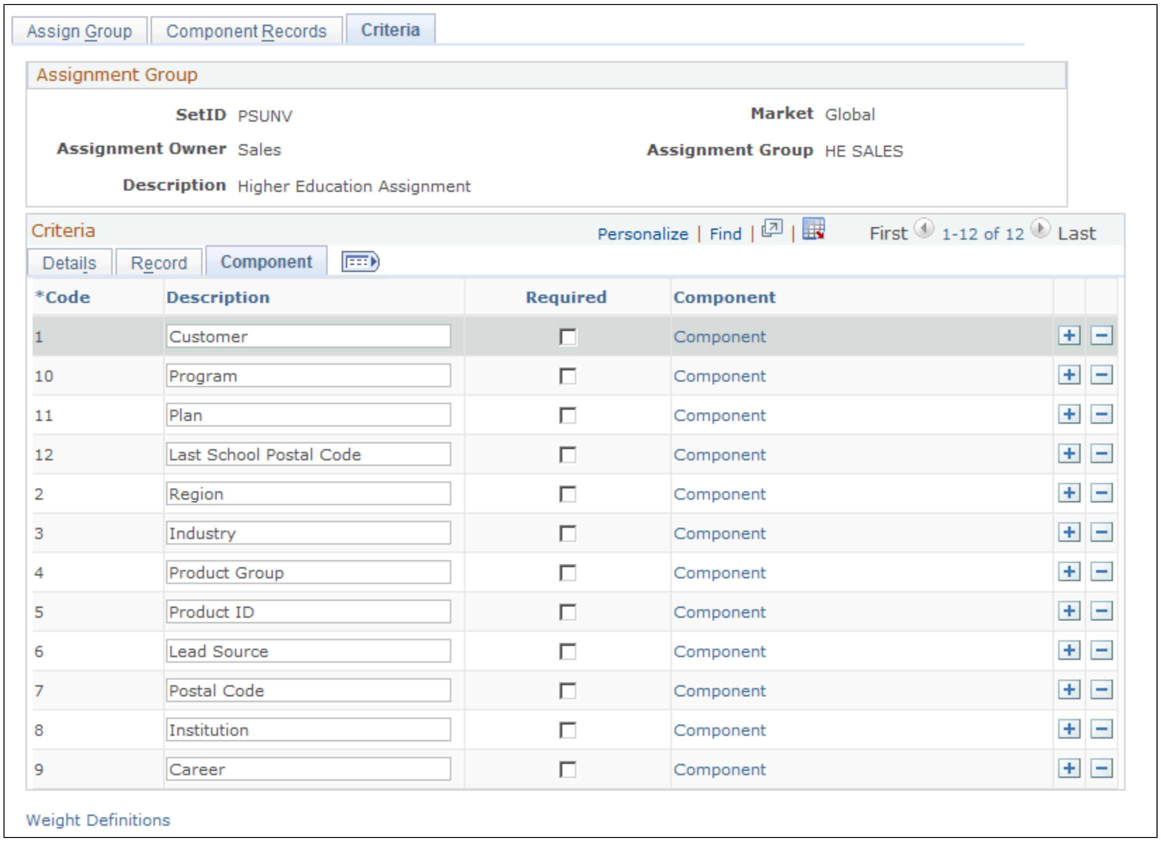


Image: Criteria page: Component tab

This example illustrates the fields and controls on the Criteria page: Component tab.



Weight Definitions

Click to access the Assignment Weights page to specify the weights that you can give to assignment criteria or to add new weights to the assignment group.

See Setting Up Assignment Weights.

Details Tab

Code and **Description**

Enter a code and description for the criteria used for the assignment group.

Required

Select to identify data that must exist to allow an assignment.

For example, if you indicate that a product ID is required and you do not specify a product ID, when you click the Find Sales Rep button on the Lead - Assign or Opportunity - Assign page an error message appears indicating that a required criterion (product ID) is missing and that you must enter the required criteria before the system can make the assignment.

Required data must have an assigned weight. The default assigned weight is *0 - Ignore.* Typically, you change the default weight for required data.

Warning! You must identify required data and assign weights for all required data.

Weight

Specify the importance of criteria when the system makes a match.

Some weight lists have anchors—that is, low, middle, and high values—with other values in between. For example, the predefined weights for the SHARE setID (as shown in the example) are in increments of one (0, 1, 2, 3, 4, 5, 6, 7, 8, 9). These weights have anchors of *0 = Ignore, 1 = Least Important, 5 = Important,* and *9 = Most Important.*

Click the Weight Definitions link to determine weight definitions.

Record Tab

Type

Select to specify whether a single value or a range of values is permitted for a match.

For example, suppose that you want to search for representatives who work with a particular customer (as the logged in sales user or specified sales representative information). In that case, you would select the customer type *Single.* To have the system search for representatives within a range of postal codes, select the postal code type *Range.*

Specify the beginning and end of a range on the Territory Definitions page.

Note: Currently, the system does not process dates as criteria ranges.

See Creating Territory Trees.

Record and **Key Field**

Enter the specific record and field that the system uses when prompting for the criteria data that is available for an assignment group.

Component Tab

Component

Click to access the Component page to view the components that use the criteria field and to determine the location in the component buffer from which the criteria field comes.

Chapter 10

Understanding Sales Leads and Opportunities

Leads and Opportunities

This topic discusses:

- Lead and opportunity management.
- Leads.
- Opportunities.
- Prospects.
- Profile enablement.
- Higher Education for Sales.

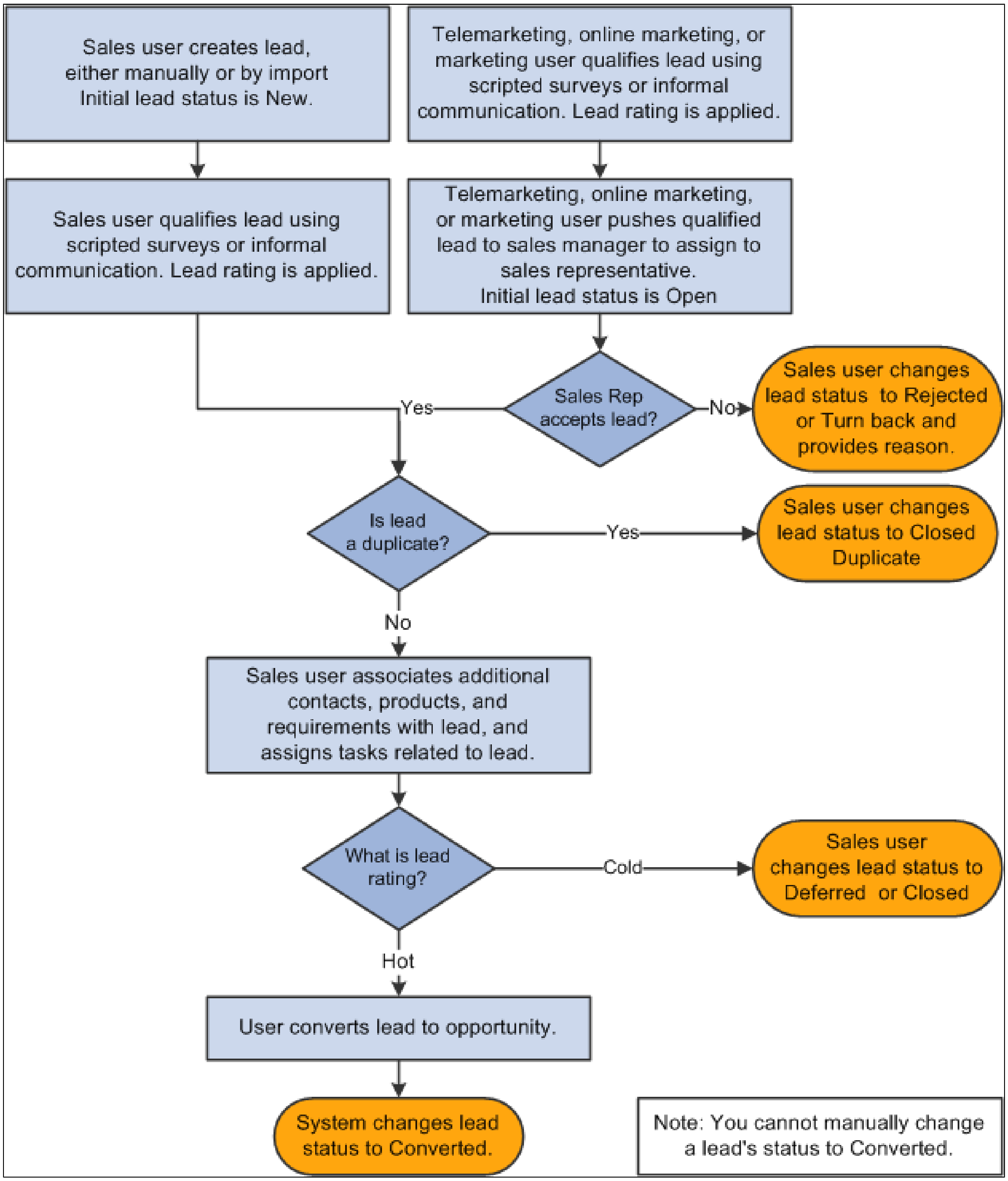
Lead and Opportunity Management

The key to a successful sales cycle is efficiently managing leads and opportunities toward the closing of a sale. You start by bringing leads into the system, qualifying them, and then converting them to opportunities. Then, you assign potential revenue figures and expected close dates to the opportunities, and you review the opportunities within pipelines and forecasts to estimate individual and company revenue.

Some companies have fast transaction cycles with no distinction between a lead and an opportunity. Other companies have longer sales cycles, and tracking opportunity information becomes critical. Whether a company uses leads only, opportunities only, or both leads and opportunities, sales representatives typically enter and track all of the information. PeopleSoft Sales is a flexible, configurable management tool that enables you to enter and track lead and opportunity data and enables sales managers to view that data to manage sales progress and predict close sales ratios. This diagram illustrates the business flow for managing leads, starting from their creation to their conversion to opportunities:

Image: Processing of leads from their creation to their conversion to opportunities

This diagram illustrates the business flow for managing leads, starting from their creation to their conversion to opportunities.



Sales users can:

- Search for and organize leads and opportunities by virtually any criteria: sales representative, status, lead rating, and so on.
- Look up company and contact information, identify competitors, and include notes and attachments for each deal.

- Capture the supporting efforts required for handling any lead or opportunity by adding tasks and assigning them to the appropriate team members.
- View their tasks on the My Tasks page or by using the automated calendar.

  Tasks that are added to a lead or opportunity appear automatically in the task list and calendar of the person to whom the task is assigned.
- View task history for any lead or opportunity to quickly identify which tasks are in process, canceled, or completed.
- View a summary of the marketing campaign that generated the lead or opportunity.

  This information is conveyed in sales and not marketing terminology and includes suggestions for appropriate follow-up actions.
- Generate a call report.

Additionally, managers can identify sales teams and assign sales team members.

Related Links

Understanding the Sales Process

Leads

A lead represents a potential customer for the sale of the company's products and services. In some sales organizations—especially those that sell products and services over the telephone as part of a call center operation—the lead can be used to track all elements of the sales transaction, from qualification to closure.

PeopleSoft Sales enables you to manage leads and track them from beginning through closures. When a lead is qualified, it can be converted into an opportunity for pursuit by selling organizations. A single person can be a lead sales representative for multiple opportunities. An opportunity can also be associated with multiple leads.

The minimum requirements for creating a lead in PeopleSoft Sales include:

- A description of the lead.
- A lead status.
- The business unit.

It is recommended that you also include the customer name and at least one contact name and phone number for follow-up. You can enter as much additional information as needed.

You can enter leads into PeopleSoft Sales by:

- Creating a new lead and entering the data directly.
- Copying or cloning an existing lead, changing the necessary data, and saving it as a new lead.
- Importing data from an external comma-delimited spreadsheet.

- Integration with PeopleSoft Marketing.

See PeopleSoft Marketing.

You qualify leads to determine how likely it is that the potential customer will make a purchase. With PeopleSoft Sales, you can use a branch script, or survey, to do this. A survey is a set of questions with specified score levels to rate the customer's response. When you finish entering the customer's responses, the system tallies a total of the scores and rates the lead; for example, it might rate a lead as hot, warm, or cold. The marketing department often administers the survey as part of a marketing campaign, or a sales representative might select a survey script to run.

Opportunities

You can add an opportunity directly to PeopleSoft Sales, or you can convert an existing lead to an opportunity.

If the organization does not use leads, you can add opportunities and manage and track them as you do leads, including qualifying and assigning them and developing the sales proposals.

If you use leads and a lead meets the organization's requirements, you can convert the lead to an opportunity.

Note: Opportunities are included in pipelines and forecasts, but leads are not.

As with leads, the minimum requirements for creating an opportunity include:

- A description of the opportunity.
- An opportunity status.
- The business unit.

Prospects

Sometimes you might want to enter a potential customer or contact into the system so that you can capture their information, but because adding unnecessary information to the database can affect performance, you do not want to commit their information to your database until they become actual customers or contacts. These potential customers or contacts are called *prospects*, and only the minimal information necessary to identify them is included. Prospects are associated with leads and opportunities.

These sales pages display prospect information for leads and opportunities. You can edit prospect information directly on these pages:

- Lead import results.
- Online entry of leads and opportunities.
- Search list for leads and opportunities.

Prospects are not stored in the Customer Data Model (CDM); rather, they are stored along with their leads and opportunities. Customers and contacts from the CDM, however, appear as links that enable you to access the CDM component for editing.

When a lead is converted to an opportunity or an opportunity is set to *Closed/Won*, the prospect information is transferred (*pushed*) to the CDM, converting the prospect to a contact or customer. A prospect is also pushed to the CDM when you use quick create to manually convert prospects from leads and opportunities to customers or contacts.

Prospect information appears on Sales components only (Lead, Opportunity, Referral) and does not appear on these elements:

- My Contacts.
- Tasks.
- Call Reports.
- Audiences.
- Segments.
- 360-Degree View.

Profile Enablement

The Lead and Opportunity components support the display of profile fields on the More Info page. You can set up separate sets of profile fields to show in leads and opportunities based on the business object that is referenced (person or company).

To add profile fields to the More Info page:

1. Define profile fields on the Profiles page.

   The CRM system delivers profile fields, some are for general use and some are geared towards specific industries. For profile fields that you want to use, make sure that they are activated.

2. Add profile fields to profile groups on the Define Profile Group page.
3. Assign the profile groups to the *Sales Person* component (for leads and opportunities referencing consumers) or the *Sales Company* component (for leads and opportunities referencing companies) on Assign Profile Group Display page.

   Here, you can configure if a profile field appears as read-only or can be updated at runtime.

Refer to the see reference for more information on how to set up profiles to display in profile-enabled components.

See "Understanding Profiles" (PeopleSoft CRM 9.2: Business Object Management).

At runtime, the profile fields appear on the More Info page of the component that is set up to display them. You can update the values of these profile fields if they are not set as read-only, which are stored in the corresponding lead or opportunity. However, the current status of the lead or opportunity also plays a role in determining the availability of profile fields for edits. In other words, if a lead or opportunity is in a status (for example, *Converted to Opportunity* for leads) that does not allow any update to be made, profile fields are not available for edit even if they are not set to be read-only on the Assign Profile Group Display page.

Related Links

Maintaining Profile Data for a Lead or Opportunity

Higher Education for Sales

In the higher education world, when prospects are qualified from the marketing application, recruiting managers can create leads for these prospects and leads are then assigned to recruiters either manually or automatically. Recruiters work the leads and convert the qualified ones to opportunities. PeopleSoft Sales helps to build an effective recruiting system in CRM by providing enhancements in these areas:

- Leads and opportunities.
- Assignment group for Higher Education.
- Publishing academic information changes between leads or opportunities and constituents.

Leads and Opportunities

Enhancements for the Lead and Opportunity components include:

- Adding new section for selecting and storing academic information for constituents.
- Using a new display template to render leads and opportunities for Higher Education usage.

Academic Information Support

A new section is added to the Discover page of leads and opportunities to support the selection and storing of education information for constituents, which include institution, career, programs and plans.

When you convert a lead to an opportunity, you can select to include the academic information in the conversion process. The system displays a warning message if it detects a mismatch of institution and career in the conversion process (especially when converting a lead to an existing opportunity).

Unlike lead conversion, academic information cannot be copied to the new object or objects in the case of cloning.

Refer to the see reference for more information on the Academic Information section.

See Lead - Discover Page.

Changes in Pages, Sections and Fields

The CRM system delivers the Higher Education Sales Display Template Family (HE_SALES) for displaying Higher Education leads and opportunities. The system renders leads and opportunities using the HE_SALES display template if the Higher Education option is selected in the Installation Options page.

The HE_SALES display template makes these visual changes to the Lead and Opportunity components:

- The Summary page of the Lead and Opportunity components.

  This page is not visible in either component.

- The Discover page of the Lead and Opportunity components.
    - The Academic Information section is added to both components.
    - The Contacts section is not visible in either component.
    - *Sales Rep* is renamed *Recruiter*.
- The Assign page of the Lead and Opportunity components.
    - *Sales Rep* is renamed *Recruiter*.
    - *Sales Team Members* is renamed *Recruiting Team Members*.
    - *Sales Team* is renamed *Recruiting Team*.

See Creating a Sales Lead, Creating a Sales Opportunity, Assigning Sales Representatives to a Lead or Opportunity, Lead - Summary Page or Opportunity - Summary Page.

Assignment Group for Higher Education

PeopleSoft Sales uses the application engine to assign sales representatives to leads and opportunities automatically. The engine refers to assignment groups for assignment configurations and criteria, together with territory definitions, to determine the appropriate sales representatives or sales teams for leads and opportunities. The system delivers a new assignment group to support the automatic assignment of recruiters and recruiting teams for Higher Education leads and opportunities. The assignment configuration and criteria of the new *HE_SALES* assignment group are similar to the setup of the existing *Sales* assignment group, with these differences:

- The *HE_SALES* assignment group does not have Company Revenue as an assignment criterion.
- The *HE_SALES* assignment group includes Institution, Career, Program, Plan and Last School Postal Code as assignment criteria.

    Note that the Last School Postal Code value is stored in CLM in a one-to-one relationship with institution and career. Each lead can store one Last School Postal Code value for the current selected institution and career combination. The recruiter or recruiting team assignment can be based on the last school postal code only if a career (not a required value) is currently selected in the lead. A change of the Last School Postal Code value in CLM does not trigger the same update in the corresponding lead. In this case, if you want the assignment engine to perform automatic assignment based on the updated last school postal code, you need to create a new lead for the constituent.

    The same is true for opportunities.
- All of the criteria mentioned above, and Postal Code, have a non-zero weight value.

Related Links

Territory Definitions Page

Configuring Assignment Criteria

Publishing Academic Information Changes

The CRM system stores the academic information (which includes institution, career, programs and plans) of a constituent in both its consumer and its lead and opportunity records. To keep the information synchronized between these records, the system publishes academic information to Constituent Lifecycle Management (CLM), which is a one-way operation, when a change occurs in a lead or opportunity so that the update is reflected in the consumer record as well.

The system publishes academic information to CLM when a change occurs in one of these items in a lead or opportunity at save time:

- Institution, career, and program and plan set.
- Status is changed to *Close - Lost* for the lead or opportunity.
- Consumer (the BO ID).

The published update includes this list of information, which is passed to CLM:

- Institution, career, and program and plan set.

  Because institution and career are read-only after it is saved for the first time, no publishing occurs for the deletion on institution and career. Programs and plans, however, can be added, changed and deleted in leads and opportunities; the update includes any program and plan changes along with the Delete Action flag to indicate addition, update or deletion of the information.

- BO ID of the consumer.

  In the case where academic information is published because of a change in consumer selection, the update of the newly saved Consumer object is published to CLM .

  This published update does not apply to the business carding scenario where there is no association with an actual BO ID.

- Transaction type (*LEAD* or *OPPY*).
- Lifecycle status (*Suspect*, *Prospect*, *Inactive*, *Applicant*, and so on).

  The lifecycle status is set to *Inactive* in the published update if the status of the lead or opportunity, the event that causes the published update to occur, is changed to *Close - Lost*.

- The Delete Action flag (*True* or *False*).

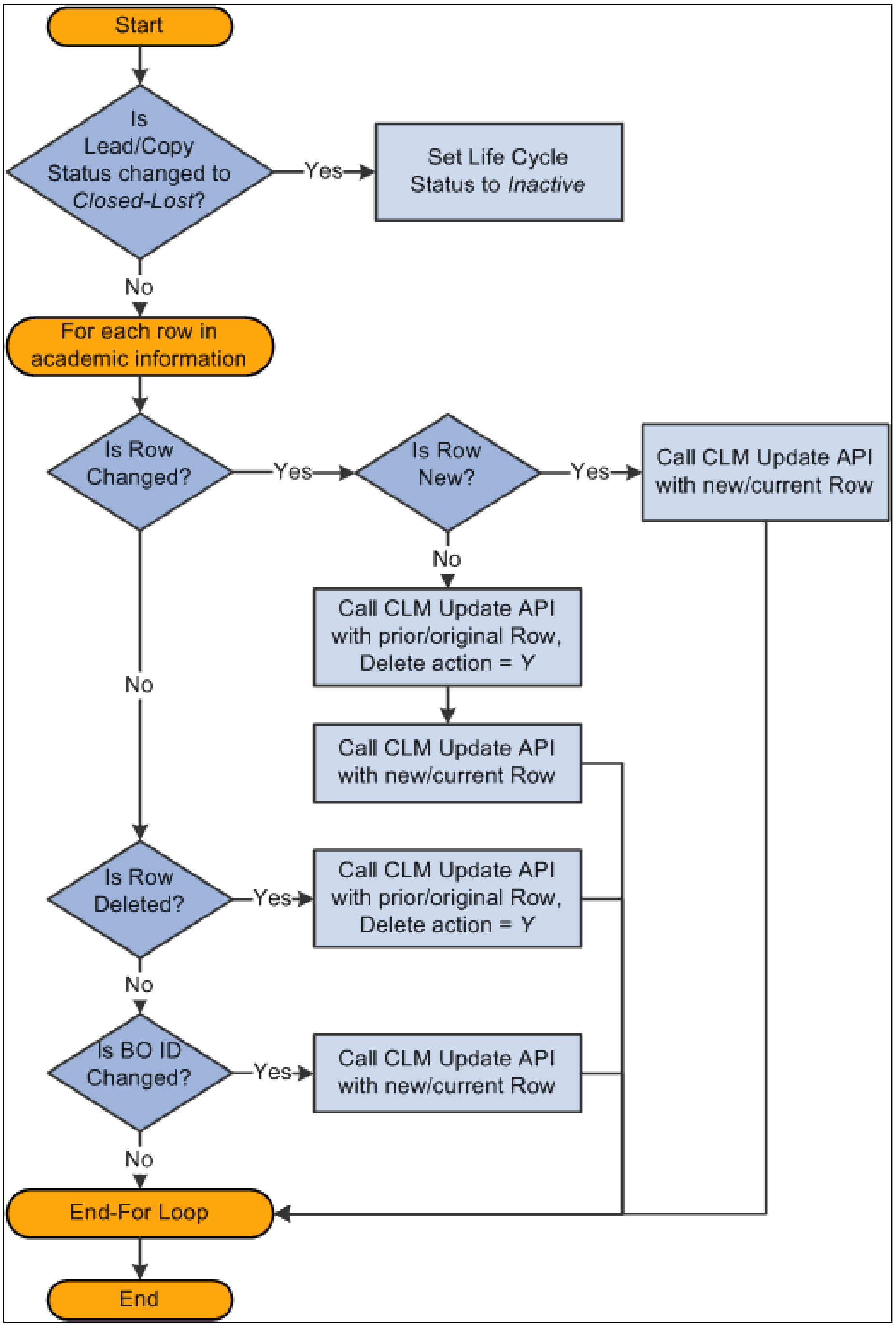
  The system sets the value of this flag to *False* if a program and plan set is added to the Academic Information section of lead or opportunity. The value is set to *True* if a program and plan set is deleted from the section. A change of program and plan set triggers two calls (one for deleting the old program and plan and the other one for adding the new program and plan).

Note: This publication pertains only to changes that occur between lead or opportunity and consumer (individual) records and it does not apply to leads and opportunities that are created for companies (organization).

This graphic illustrates the logic flow for publishing academic-related information changes taking place leads and opportunities:

Image: Logic flow for sending one-way publish to update consumer records with changes in academic-related information that occurred in leads or opportunities

his graphic illustrates the logic flow for publishing academic-related information changes taking place leads and opportunities.



Differences Between Leads and Opportunities

A significant difference between leads and opportunities is their relation to pipelines and forecasts. Opportunities, but not leads, are rolled up into pipelines and forecasts. If you integrate PeopleSoft

Incentive Management with the system, you can include opportunities (but not leads) in the compensation calculations of Incentive Management.

For the most part, the Lead component has the same pages (Summary, Discover, Assign, Qualify, Propose, Tasks, Notes, History, Call Reports, and More Info) and the same sections as the Opportunity component. The following exceptions relate specifically to forecasting, which uses products, prices, and revenue allocations:

- On the Opportunity - Propose page, sales users can click the Create Forecast button to copy products to the Forecast section and make them available for inclusion in forecasts.
- On the Revenue Percentage tab on the Opportunity - Assign page, sales users with the appropriate sales access profile can specify revenue allocations and shadow allocations to identify the amounts of revenue that are assigned to individuals.
- Because the system does not roll up leads into forecasts, no Revenue Percentage tab appears on the Lead - Assign page, and no Forecast section exists on the Lead - Propose page.

Here are some additional differences between leads and opportunities:

- You can create opportunities only in PeopleSoft Sales.

  However, you can create leads in other PeopleSoft products (for example, Marketing and Support).
- You can accept, reject, or turn back a lead, but not an opportunity.
- You can track the stage of the sales process on the Opportunity - Discover page, but not on the Lead - Discover page.

Workflow for Leads and Opportunities

You can set up workflow to send notifications when certain events occur in the Lead and Opportunity components. For example, the system can send a workflow notification to a sales manager if a sales representative rejects a lead. PeopleSoft delivers several policies that specify the details for workflow:

Policy Name	***Description***
Lead is Rejected or Turnback	The system sends notification if a sales user rejects or turns back a lead.
Lead ESA Pricing Info Received	The system sends notification when it receives pricing information from the PeopleSoft Service Automation application for a quote created from within a lead.
Lead not accepted in due time	The system sends notification when a lead is not accepted in due time, which is defined for the lead rating.
Opportunity ESA Pricing Info Received	The system sends notification when it receives pricing information from the PeopleSoft Service Automation application for a quote created from within an opportunity.

Like other PeopleSoft Customer Relationship Management applications, PeopleSoft Sales uses the Active Analytics Framework (AAF) to configure workflow.

See "Understanding PeopleSoft CRM Workflow" (PeopleSoft CRM 9.2: Automation and Configuration Tools).

History Tracking for Leads and Opportunities

The CRM system supports history tracking to maintain records of events that occur in the Lead and Opportunity components through the AAF. For example, the system can log a record if a sales manager changes the sales representative assignment for a lead. PeopleSoft Sales delivers these AAF policies that specify the details for history tracking:

Policy Name	***Description***
Lead Assigned To Changed	The system logs a history record if a sales user changes the sales representative assignment for a lead.
Lead Rating Changed	The system logs a history record if a sales user changes the rating for a lead.
Lead Status Changed	The system logs a history record if a sales user changes the status for a lead.
Opportunity Assigned To Changed	The system logs a history record if a sales user changes the sales representative assignment for an opportunity.
Opportunity Sales Stage Changed	The system logs a history record if a sales user changes the sales stage for an opportunity.
Opportunity Status Changed	The system logs a history record if a sales user changes the status for an opportunity.

When enabled, these policies are triggered when a lead or opportunity of the specified setID is saved. The framework evaluates the conditions of the policies and carries out actions for the policies that have a positive evaluation result.

Related Links

"Understanding CRM Action Types" (PeopleSoft CRM 9.2: Automation and Configuration Tools)

"Sales History Configuration Page" (PeopleSoft CRM 9.2: Automation and Configuration Tools)

Chapter 11

Creating Sales Leads and Opportunities

Creating a Sales Lead

This topic discusses how to create a sales lead.

Warning! If you use a Sybase database and your user role has data distribution rules with 16 or more subqueries, you may receive an error message when you access a lead or opportunity. If an error occurs, reduce the number of data distribution rules for the user role, or reduce the complexity of the data distribution rules.

You can set up data distribution rules in Enterprise Components.

See Enterprise Components product documentation.

Page Used to Create a Sales Lead

Page Name	***Definition Name***	***Usage***
Lead - Discover Page	RSF_LEAD_ENTRY	Enter details about a sales lead, including the name, status, and rating, and the customer's name, address, and contact people.

Lead - Discover Page

Use the Lead - Discover page (RSF_LEAD_ENTRY) to enter details about a sales lead, including the name, status, and rating, and the customer's name, address, and contact people.

Navigation

- Sales > Add Lead > Lead - Discover
- Sales > Search Leads > Lead - Discover

Image: Lead - Discover page (1 of 2)

This example illustrates the fields and controls on the Lead - Discover page (1 of 2).

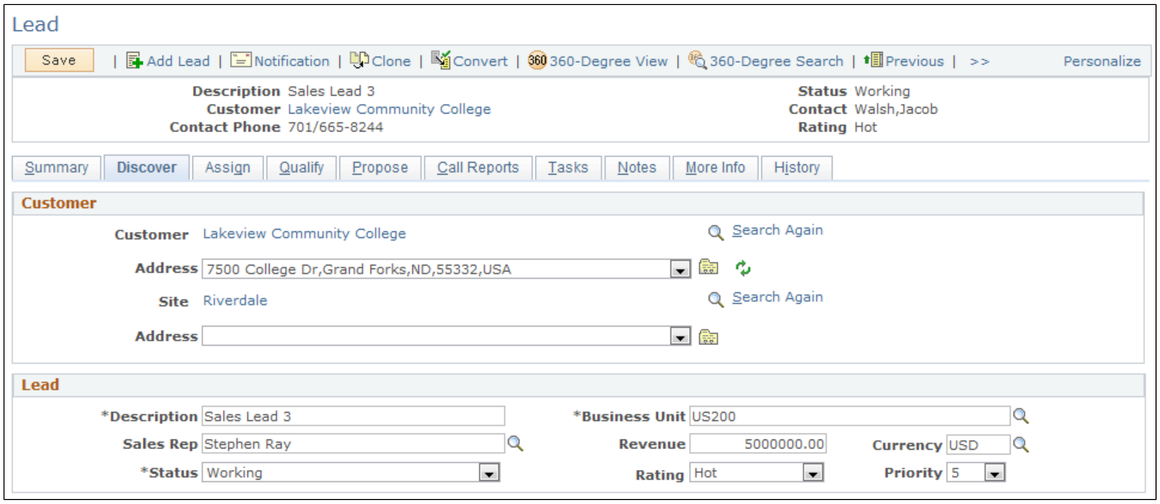
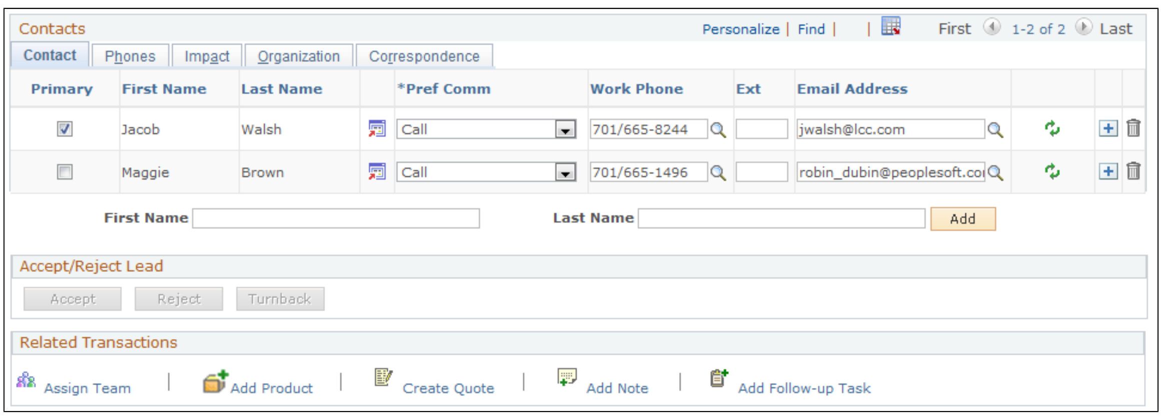


Image: Lead - Discover page (2 of 2)

This example illustrates the fields and controls on the Lead - Discover page (2 of 2).



Customer

The Type field indicates whether a lead is a company or a consumer. Depending on which you choose, different fields appear. For company customers, you can enter Customer and Site; for consumers, the fields are First Name, Last Name, and Site.

Note: For Higher Education leads, the *Consumer* type is selected as the default value if the business carding functionality is enabled.

See Selecting the Customer for a Lead or Opportunity.

When a customer is present on the lead, the Address field is populated with the primary address for the customer. Use the drop-down box to select whether to use an existing address, search for an existing address not in the list, or add a new address. Then, click the Go button to search for an address or add a new address.

Note that if the customer for a lead is a prospect, the name of the customer is editable on the Lead - Discover page. Otherwise, the customer name is displayed as a link that you can click to view more information about the customer.

When you manually create a lead, a text entry field and a search button appear next to the Customer and Site or First Name/Last Name and Site fields. You can enter or search for a customer and site. Before clicking the Search button, you can optionally enter characters in the Customer or First Name and Last Name fields to limit the search.

See Selecting the Customer for a Lead or Opportunity.

If you display an existing lead, the relevant fields (Customer or First Name and Last Name are displayed when lead is for a prospect customer.) If the lead is for an existing customer, a link is displayed that can be clicked to launch an existing customer's information on either the Company or Person (Consumer) components. The Search button becomes a Search Again link.

When a customer is present on the lead, the Address field is populated with the primary address for the customer. Use the drop-down box to select whether to use an existing address, search for an existing address not in the list, or add a new address. Then, click the Go button to search for an address or add a new address.

Lead

Description

Enter a description of the lead. This can be the customer name, the product, or other descriptive information.

You can define the default value for this field on the Component Field Default component.

See Setting Up Component Field Default Values.

Business Unit

Enter the business unit with which the lead is associated. The default is the business unit that is associated with the sales user on the Sales User page. If the person who is signed in is not a sales user, then the system uses the business unit that is specified on the person's User Preference page.

Sales Rep (sales representative)

Enter the primary sales representative (formatted name: *first name, last name*) who is assigned for this lead. The default is the name of the sales user who is currently signed in. If your sales access profile permits you to reassign leads, you can override the default value.

You can enter the desired sales person's name by entering a few letters of the sales user's last name and clicking the Lookup button to search for that person, or you can click Lookup without entering any letters to select from the list of all sales users that are within the specified business unit.

Note: This field is renamed Recruiter for Higher Education leads.

Revenue and **Currency**

Enter the estimated amount of revenue that you anticipate from this lead and the currency code for the revenue. When you add products to the lead on the Propose page, this currency is used for pricing information and to calculate a total price. You cannot change the currency code if products are already associated with the lead.

The default currency code is the code that is associated with the sales user on the Sales User page.

Status

Select the current status of the lead.

Note: Status values are delivered as translate values; do not modify or delete them. However, if you have the required security permissions, you can create additional status values.

Delivered values are:

- *Accepted:* The lead is accepted by the assignee.
- *Closed - Duplicate:* The lead is a duplicate of an existing, active lead. (Fields remain display-only.)
- *Closed - Lost:* The lead should not be worked or updated because the sale was lost. (Fields remain display-only.)
- *Closed - Won:* The lead should not be worked or updated because the sale was won. (Fields remain display-only.)
- *Converted to Opportunity:* The lead is converted to an opportunity and is available for pipelines and forecasts.

  Use the Convert button in the toolbar to convert a lead to an opportunity. When a lead is converted, the fields on the Lead pages remain display-only. You must access the opportunity to enter or update data.
- *Deferred:* The assignee cannot accept the lead at this time. For example, a sales representative might select this value when attempts to contact the customer are unsuccessful and the representative wants to handle other leads and then return to this one later.
- *Imported:* The lead is imported from an external spreadsheet.
- *New:* The lead is recently created.

  Note: The system assigns this value when you add a new lead. Then, when you enter data and save the page, the system changes the status to *Open.*
- *Open:* The lead is available but is not yet accepted, rejected, or turned back.
- *Referred:* The assignee refers the lead to another specified sales representative.

- *Rejected:* The assignee does not accept the lead and enters a rejection reason. When you select this value, the Reason and Comments fields appear; you must enter a reason.
- *Turnback:* The assignee resubmitted the lead for assignment to another sales representative. When you select this value, the Reason and Comments fields appear, and the Sales Rep (sales representative) field is deselected; you must enter a reason.
- *Working:* The assignee accepted the lead and is currently working on it.

Rating

Indicates the degree of the customer's interest or the potential for making a sale; for example, *Hot, Warm,* or *Cold.*

Define rating values on the Lead Ratings page. Also, you can map scripted survey ratings to lead ratings to qualify a lead and move it from PeopleSoft Marketing to Sales. If a lead is not accepted or rejected within the specified time for its rating, PeopleSoft Sales workflow can be triggered to send an email notification to the assigned sales representative and to the representative's manager. Workflow can also send an email notification to the marketing agent who transferred the lead and to that agent's manager.

Note: If the lead source is PeopleSoft Marketing, the value in this field is automatically generated. You can override this value.

See Setting Up Lead Ratings.

Priority

Select a priority to indicate the urgency of working this lead. Priority values are translate values.

Academic Information

Use this section to select and store information about the institution, career, and one or more program and plan sets for the constituent in the lead.

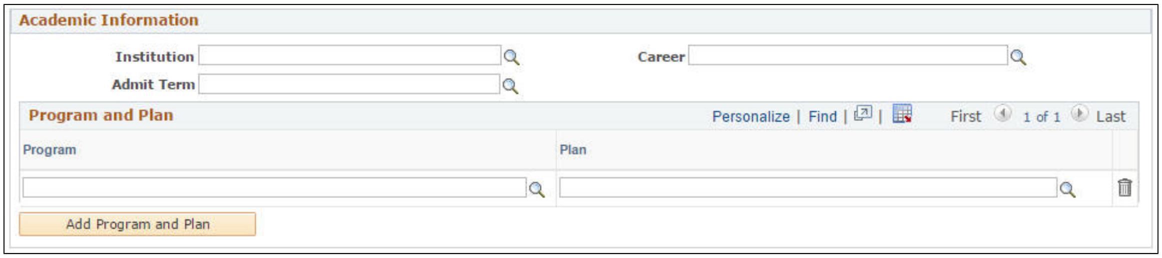
This section appears only for Higher Education leads. Changing the customer of the lead does not change the current selection in this section.

If the Academic Information section is not displayed in the Lead — Discover page, check installation options and see if the Higher Education option is enabled. To check this pre-requisite, navigate to Setup CRM >Install >Installation Options and select Higher Education under Product Options and Save. Then, navigate to Setup CRM >Common Definitions >Component Configuration >Display Templates >Display Template Details. Search for HE_SALES Display Template and open the template for leads. Click Discover and select the Academic Information option under Sections. Save changes.

After making changes to the Installation Options, restart the Application Server and access the Lead — Discover page.

Image: Academic Information section of the Lead - Discover page

This example illustrates the fields and controls on the Academic Information section of the Lead - Discover page.



Institution and **Career**

Select the institution and career for the lead. These fields are editable when you first add the new lead; they become read-only after the lead is saved.

The system filters the values for career based on the selected institution.

Each lead supports only one institution and career.

Admit Term

Select an admit term for the selected institution, career, program and plan combination, if applicable.

Note: Enter value in this field if you run the *Recruiting Performance* Fusion Intelligence reports off of the *CSW: Recruiting & Admissions* Interactive Dashboard.

Program and **Plan**

Enter a school program and a plan for the program.

You can enter multiple programs and plans for the lead. The system filters the values for program based on the selected career, and plans based on the selected program.

The system removes any existing program and plan sets in the lead if you change the current institution or career.

Add Program and Plan

Click to add a new row and enter a program and a plan.

See Higher Education for Sales.

Contacts

This page region enables you to view and enter information about the contacts for the lead.

If the Allow Prospects option is enabled on the Installation Options page, you can use the + button to enter new prospects, or run a search to find already entered contacts.

See Selecting Customer Contacts for a Lead or Opportunity, "Understanding PeopleSoft CRM General Options" (PeopleSoft CRM 9.2: Application Fundamentals).

Accept/Reject Lead

Click a button to accept, reject, or turn back the lead. If you click the Reject or Turnback button, the Reason (required) and Comments (optional) fields appear on the page.

Related Links

Understanding Proposals for a Lead or Opportunity

Creating a Sales Opportunity

This topic discusses how to create a sales opportunity.

Warning! If you use a Sybase database and the user role has data distribution rules with 16 or more subqueries, you may receive an error message when you access a lead or opportunity. If an error occurs, reduce the number of data distribution rules for the user role, or reduce the complexity of the data distribution rules.

You can set up data distribution rules in Enterprise Components.

See Enterprise Components product documentation.

Page Used to Create a Sales Opportunity

Page Name	***Definition Name***	***Usage***
Opportunity - Discover Page	RSF_OPP_DETAIL	Identify details about a sales opportunity, including the name, status, and rating, and the customer's name, address, and contact people.

Opportunity - Discover Page

Use the Opportunity - Discover page (RSF_OPP_DETAIL) to identify details about a sales opportunity, including the name, status, and rating, and the customer's name, address, and contact people.

Navigation

- Sales > Add Opportunity > Opportunity - Discover
- Sales > Search Opportunities > Opportunity - Discover

Image: Opportunity - Discover page (1 of 2)

This example illustrates the fields and controls on the Opportunity - Discover page (1 of 2).

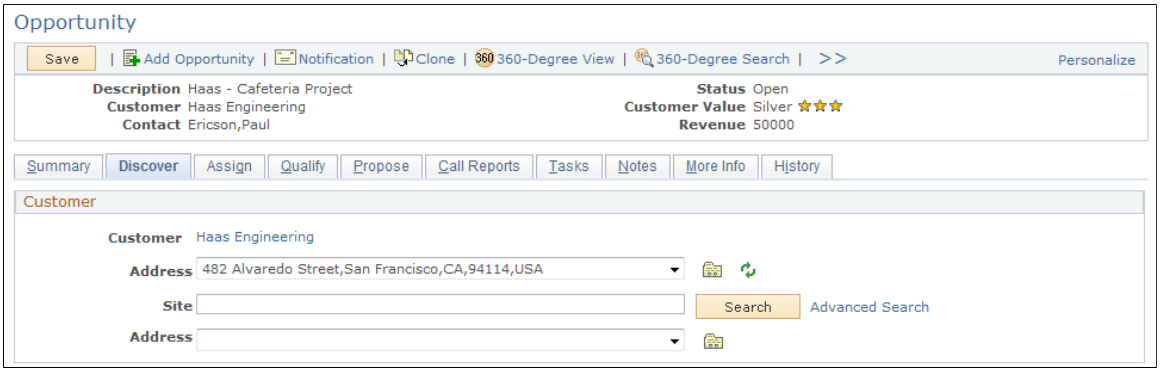
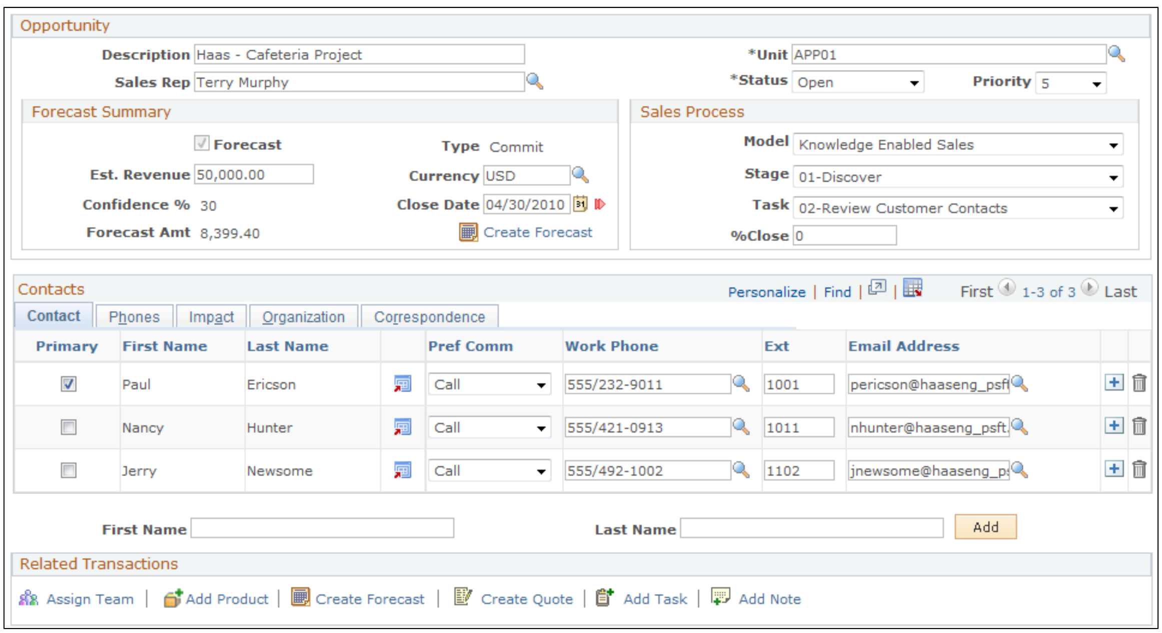


Image: Opportunity - Discover page (2 of 2)

This example illustrates the fields and controls on the Opportunity - Discover page (2 of 2).



This page is similar in appearance and usage to the Lead - Discover page with the following exceptions:

- The Opportunity Details page region includes a forecast summary.
- You cannot accept, reject, or turn back an opportunity.

Note that, as with a lead, if the customer for an opportunity is a prospect, the name of the customer is editable on the Opportunity - Discover page. Otherwise, the customer name is displayed as a link that you can click to view more information about the customer.

Higher Education Enhancements

Updates for Higher Education leads apply to Higher Education opportunities as well. They are:

- Hiding of the Contacts section.
- Introduction of the Academic Information section.

- Renaming of *sales rep* to *recruiter*.

Sales Process

Model

Select the overall sales process to use for this opportunity; for example, the proprietary Knowledge-Enabled Sales process.

Set up sales processes on the Sales Process page.

See Setting Up a Sales Process.

Stage

Select the current stage of the sales process for this opportunity. The system populates this drop-down list box with values that are based on the specified sales process.

Set up sales stages on the Sales Process page.

See Setting Up a Sales Process.

Task

Select the current task to perform for this opportunity. The system populates the drop-down list box with values that are based on the specified sales process and sales stage.

Set up sales tasks on the Sales Process page.

See Setting Up a Sales Process.

%Close (percentage close)

The system calculates this value after you enter the sales task and save the opportunity. The calculation is based on the %Close method that is associated with the specified sales process.

See Opportunity - Discover Page.

Selecting the Customer for a Lead or Opportunity

This topic discusses how to:

- Select a customer for a lead or opportunity.
- Search for customer information.
- Use the Quick Create feature to create a customer.
- Select the customer address.
- Select the customer site address.

Pages Used to Select the Customer for a Lead or Opportunity

Page Name	***Definition Name***	***Usage***
Lead - Discover Page	RSF_LEAD_ENTRY	Select the customer for a sales lead.

Page Name	Definition Name	Usage
Opportunity - Discover Page	RSF_OPP_DETAIL	Select the customer for a sales opportunity.
Search For Customer Page	RBQ_BOSRCH	Search for a customer.
Create Company Page	RBQ_QCREATE	Create a new company and save it in the database.
Create Consumer Page	RBQ_QCREATE	Create a new consumer and save it in the database.
Customer Address Page	RSF_LE_ADDR_SEC	Enter the customer's address for a lead.
Customer Address	RSF_OPP_ADDR_SEC	Enter or review the customer's address for an opportunity.
Site Address Page	RSF_LE_SITE_SEC	Enter or review the customer site address for a lead.

Lead - Discover Page

Use the Lead - Discover page (RSF_LEAD_ENTRY) to select the customer for a sales lead.

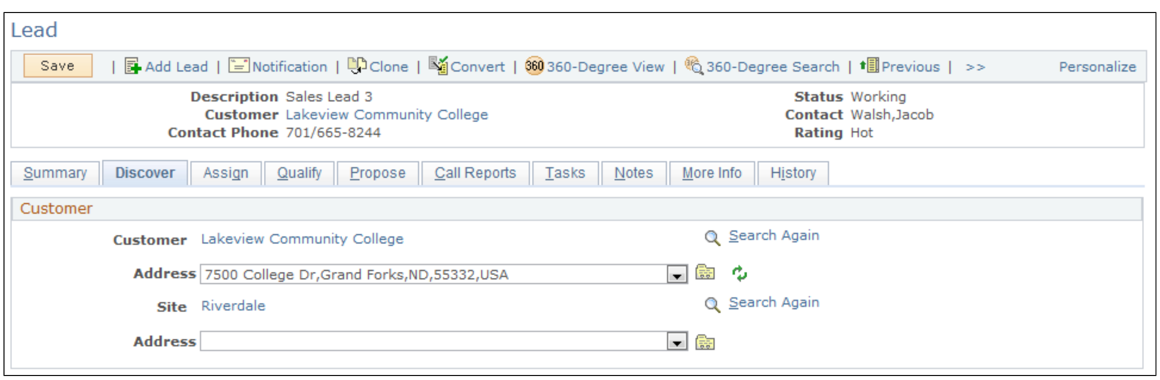
Navigation

- Sales > Add Lead > Lead - Discover
- Sales > Search Leads > Lead - Discover

Note: The Customer section appears on the Lead - Discover page and the Opportunity - Discover page. Although the following example shows the Lead component, the information here applies to both leads and opportunities.

Image: Lead - Discover page

This example illustrates the fields and controls on the Lead - Discover page.



Search Before clicking a Search button, you must enter a business unit. Also, you have the option to enter characters in the Customer or Site field. Click the Search button to search for customer or site data and to determine if a customer or site already exists. If it does not exist, you can quickly create a customer or site.

If you select a site before a customer, then the system automatically populates the Customer field. If you select a customer before a site, then you can only search for sites of that customer.

Advanced Search

Click the Advanced Search link to search for customer or site data. You can enter specific criteria to use in the search.

Address

After you select a customer, the system populates the Address field with the primary address for the customer. Use the drop-down box to select whether to use an existing address, search for an existing address not in the list, or add a new address. Then click the Go button to search for an address or add a new address.

Note: If you already selected a customer or a site, the system displays a Search Again link instead of the Search box and Advanced Search link.

Search For Customer Page

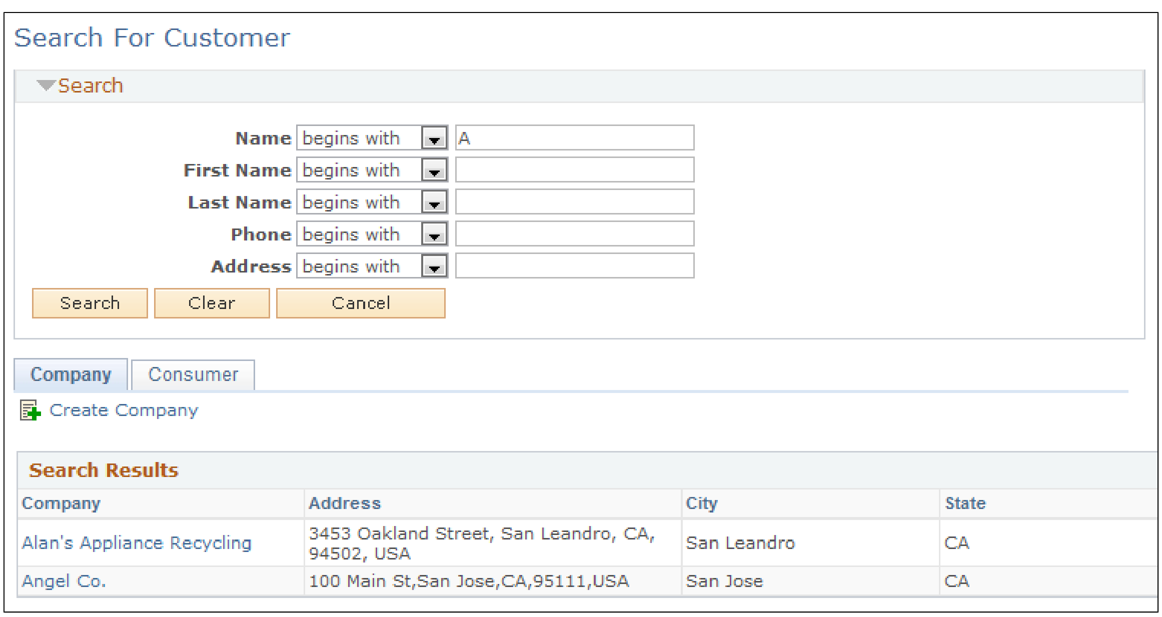
Use the Search For Customer page (RBQ_BOSRCH) to search for a customer.

Navigation

Click the Search button on the Lead - Discover or Opportunity - Discover page.

Image: Search For Customer page

This example illustrates the fields and controls on the Search For Customer page.



To select a customer, click a company or consumer in the Search Results section. To add a new company or consumer, click the Create Company link or Create Consumer link.

Create Company Page

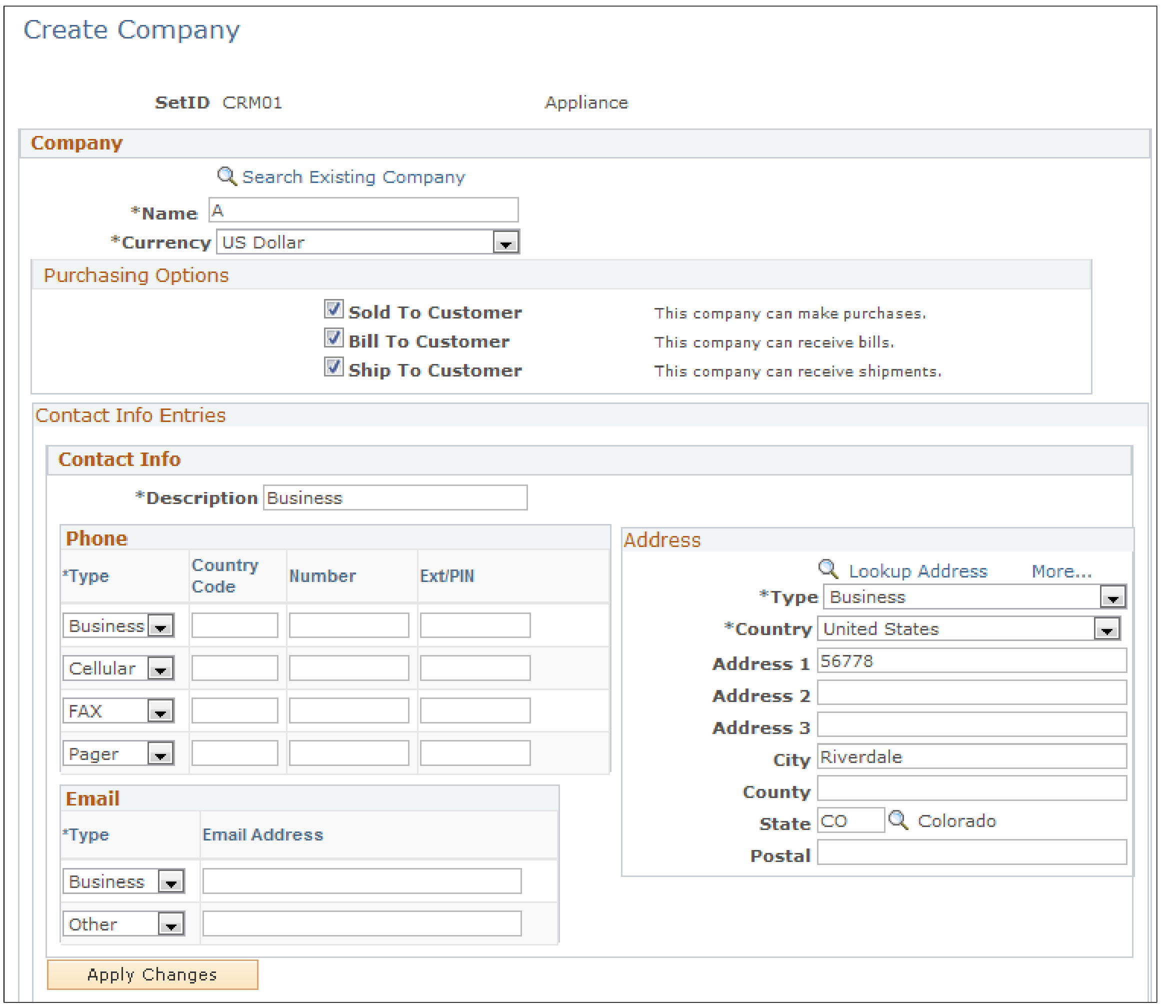
Use the Create Company page (RBQ_QCREATE) to create a new company and save it in the database.

Navigation

Click the Create Company link on the Company tab of the Search For Customer page.

Image: Create Company page

This example illustrates the fields and controls on the Create Company page.



The Create Company page and the Create Consumer page are similar in appearance and usage.

When you use the Quick Create feature, you enter the customer information directly into the database, and the customer entry immediately becomes available for searching.

Note: When you use the Quick Create feature to create a new company or consumer all applicable information from the lead or opportunity is passed to it.

Related Links

"Creating Business Objects by Using the Quick Create Component" (PeopleSoft CRM 9.2: Business Object Management)

Customer Address Page

Use the Customer Address page (RSF_LE_ADDR_SEC) to enter the customer's address for a lead.

Navigation

Select —> *add address* in the first Address field of the Customer section of the Lead - Discover page. Click the Go button.

Use the Customer Address page (RSF_OPP_ADDR_SEC) to enter or review the customer's address for an opportunity.

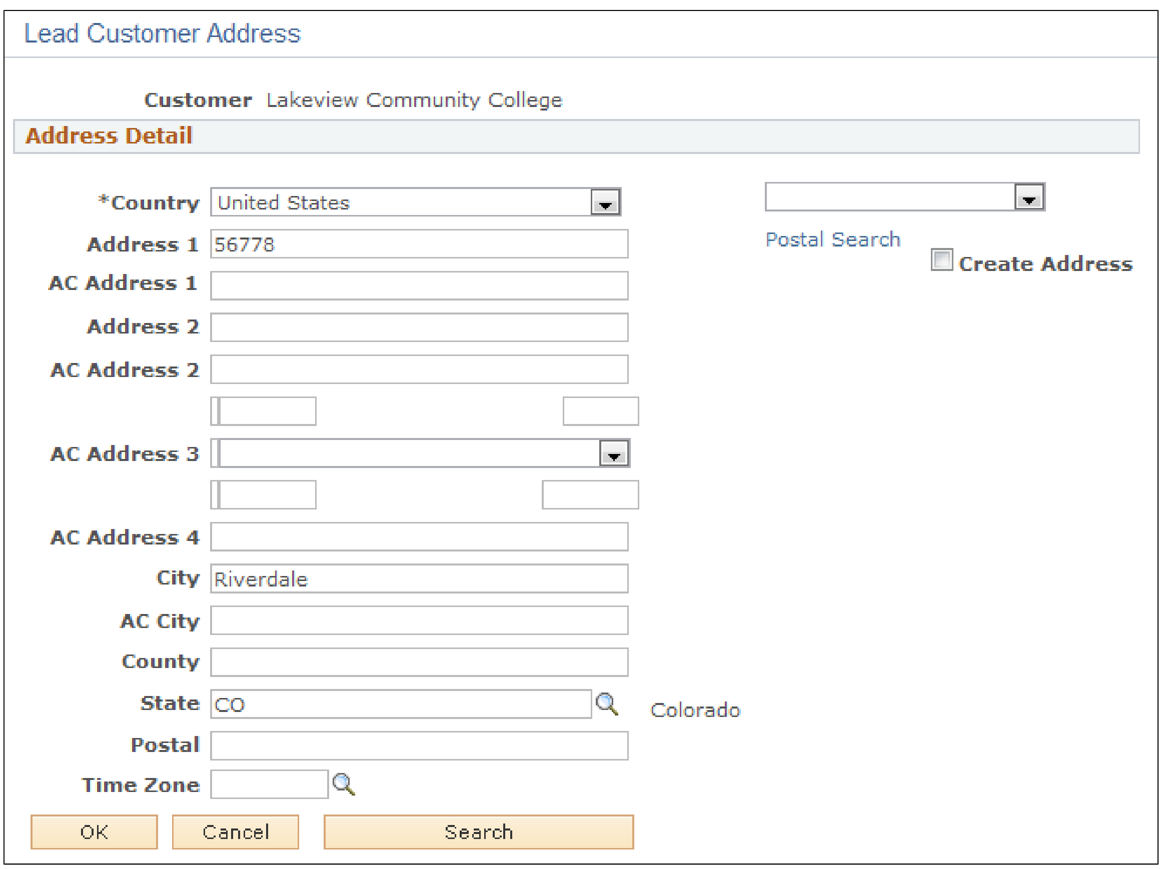
Navigation

Select —> *add address* in the first Address field of the Customer section of the Opportunity - Discover page. Click the Go button.

Note: Although the following example shows a customer address, the information applies to both the Customer Address page and the Site Address page.

Image: Customer Address page

This example illustrates the fields and controls on the Customer Address page.



Note: In PeopleSoft Sales, you can save only one customer address and one customer site address for each customer for the lead or opportunity. However, you can create multiple addresses for the same customer in the database. To add or update addresses in the database, use the Quick Create pages or customer information pages under the CRM Customer menu.

OK	Click to save data on this page and make it available for viewing or updating later. The system displays the beginning of the address in the Address drop-down box for the Customer or Site field on the Lead - Discover page or Opportunity - Discover page.
Search	Click to search for an address to determine if it already exists. **Note:** If an address already exists and you enter it again, the system creates a duplicate entry in the database. To avoid duplicates, always search first to determine if the address exists before adding it. If the address already exists, select it from the list. The system displays the Customer Address page with the address and its associated purchasing options designations *(Sold To Address, Billing Address,* and *Shipping Address).* The Enter New Address button becomes available.

Site Address Page

Use the Site Address page (RSF_LE_SITE_SEC) to enter or review the customer site address for a lead.

Navigation

Select —> *add address* in the second Address field of the Customer section of the Lead - Discover page. Click the Go button.

Note: Fields on the Site Address page function in the same way as the fields on the Customer Address page.

See Customer Address Page.

Selecting Customer Contacts for a Lead or Opportunity

This topic discusses how to:

- Search for customer contacts.
- Use Quick Create to create a contact.
- Update customer contact information.

Pages Used to Select Customer Contacts for a Lead or Opportunity

Page Name	***Definition Name***	***Usage***
Search For Contact Page	RBQ_BOSRCH	Search for a contact. You can optionally enter a first and last name on the component's Discover page to narrow the search.
Create Contact Page	RBQ_QCREATE	Create a new contact and save it in the database.
Opportunity - Discover Page	RSF_OPP_DETAIL	Enter or view data for an opportunity.
Lead - Discover Page	RSF_LEAD_ENTRY	Enter or view data for a lead.

Search For Contact Page

Use the Search For Contact page (RBQ_BOSRCH) to search for a contact.

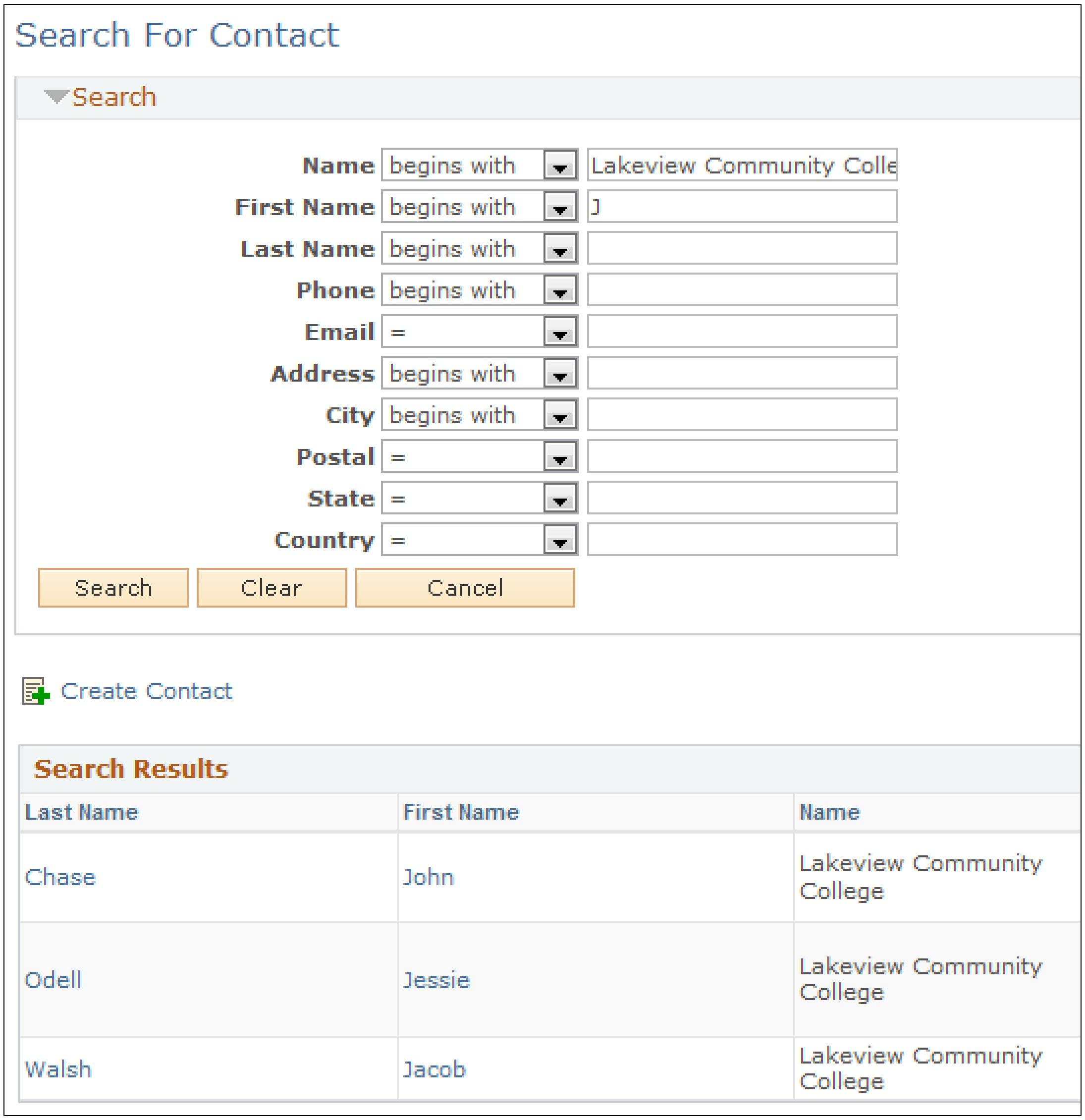
You can optionally enter a first and last name on the component's Discover page to narrow the search.

Navigation

Enter the first name and last name of a contact (optional) on the Lead - Discover page or the Opportunity - Discover page, and click the Add button.

Image: Search For Contact page

This example illustrates the fields and controls on the Search For Contact page.



If you select a customer before searching for a contact, the system adds the name of the customer to the Name field. This limits the search to contacts of the specific customer. The system carries over the text that you enter on the Lead - Discover page or Opportunity - Discover page for the contact name to search. You can override the text here. You can also enter search criteria for a phone number, email address, or person ID. If you select a contact that is not associated with the customer specified on the lead or opportunity, the system adds the relationship of the contact to the customer when you save.

Search	Click Search to launch the search and display results in the grid at the bottom of the page.
Select (check box)	Select the contacts to associate with the customer. If the system finds an exact match for the search criteria, it hides the Select check box and changes the Last Name and First Name field value into a link. Click the link to select the user and return to the Discover page.

Select (button)	Click this button to associate the selected contacts with the customer and to return to the Discover page, where the system displays data for the contacts that you select.
Create a New Contact	Click to access the Create Contact page to create a new contact if, after searching, you determine that a contact does not exist.

Create Contact Page

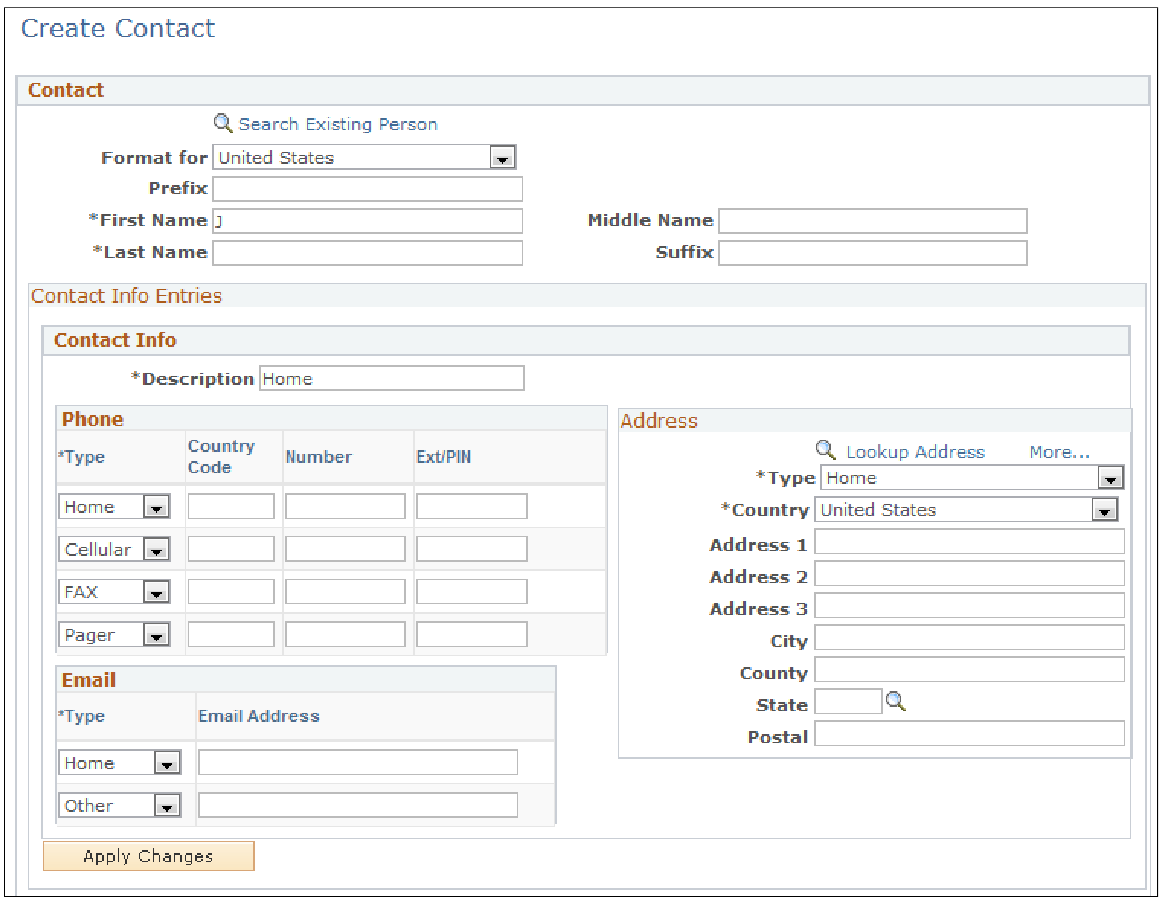
Use the Create Contact page (RBQ_QCREATE) to create a new contact and save it in the database.

Navigation

Click the Create Contact link on the Search For Contact page.

Image: Create Contact page

This example illustrates the fields and controls on the Create Contact page.



When you use the Quick Create feature, you enter the customer contact directly into the database, and that contact becomes available immediately for searching.

Note: When you use the Quick Create feature to create a new contact, only the first name and last name are passed to Quick Create. When the user returns from Quick Create, the information in the contact row is refreshed from the information that was entered on the Quick Create page. For example, if a user enters a work phone and email address in the contact grid, and then transfers to Quick Create and provides a different work phone, the work phone in the contact grid will be refreshed from the one that was provided in Quick Create. The email address still exists in the contact row and is saved to the Customer Data Model (CDM) when the user saves the lead.

Related Links

"Creating Business Objects by Using the Quick Create Component" (PeopleSoft CRM 9.2: Business Object Management)

Lead - Discover Page

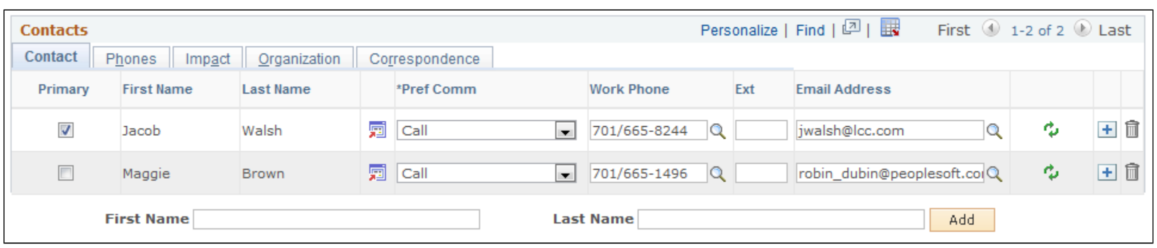
Use the Lead - Discover page (RSF_LEAD_ENTRY) to enter or view data for a lead.

Navigation

- Sales > Add Lead > Lead - Discover
- Sales > Search Leads > Lead - Discover

Image: Lead - Discover page: Contact tab

This example illustrates the fields and controls on the Lead - Discover page: Contact tab.



Note: If you edit contact information in PeopleSoft Sales, the system updates the contact information in the Customer Data Model tables.
The Contacts section appears on the Discover page in the Lead and Opportunity components. Although the example shows lead details, the information here applies to both leads and opportunities.

Contact

Primary	Select to indicate the primary contact for this lead. You can create only one primary contact.
Pref Comm (preferred communication)	Select the contact person's preferred method of communication. Communication methods are delivered as translate values that you can modify if you have the necessary permissions.
Work Phone and **Ext** (extension)	Enter the contact's work phone number here. Enter additional phone numbers on the Phones tab.

Email Address

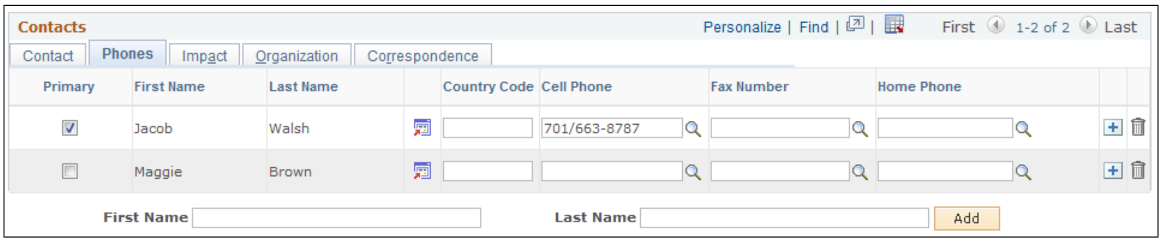
Enter the contact's email address. This address is required if you plan to email the proposal.

Phones

Select the Phones tab.

Image: Lead - Discover page: Phones tab

This example illustrates the fields and controls on the Lead - Discover page: Phones tab.



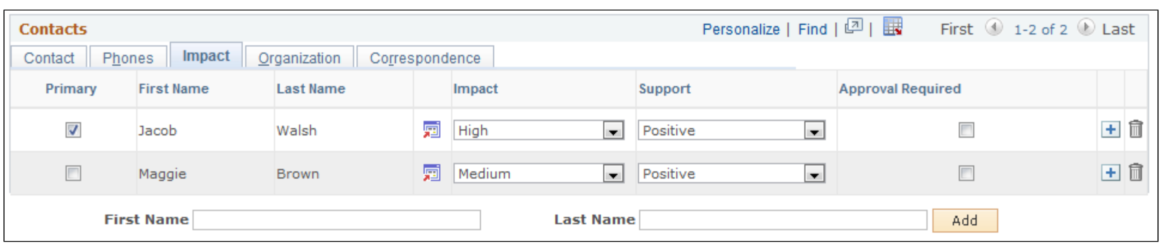
Enter all phone numbers except the contact's work phone number. Enter the contact's work phone number on the Contact tab.

Impact

Select the Impact tab.

Image: Lead - Discover page: Impact tab

This example illustrates the fields and controls on the Lead - Discover page: Impact tab.



Enter information to identify the contact's impact on the customer's decision to make the purchase.

Note: You identify the contact's decision-making role on the Contact tab, and the contact's business title on the Organization tab.

Support

Select the type of support that the contact shows for this purchase.

Define support values on the Supports page.

See Contact Support Page.

Impact

Select the impact that this contact has on the customer's decision to make the purchase.

Define impact values on the Impacts page.

See Contact Impact Page.

Approval Required

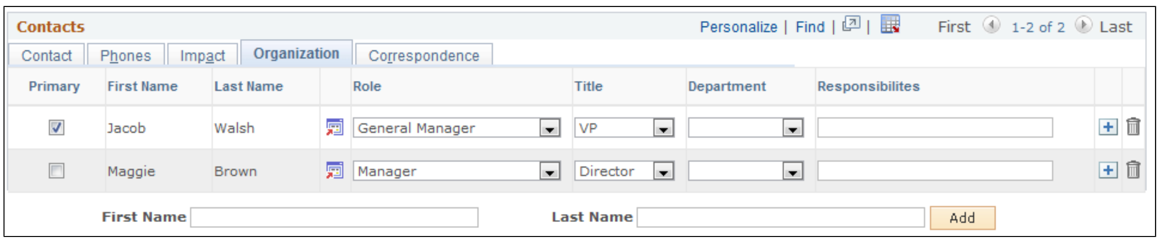
Select to indicate that the contact must grant approval on behalf of the customer for the sale to go through. For example, if the individual is influential in the company but does not have final approval, deselect this check box.

Organization

Select the Organization tab.

Image: Lead - Discover page: Organization tab

This example illustrates the fields and controls on the Lead - Discover page: Organization tab.



Enter the contact's business title, department, and responsibilities. Set up contact titles and departments on the Titles page and the Departments page.

Role

Select a role that best identifies the role of the contact.

Note: Do not confuse roles with business titles, which you enter on the Organization tab.

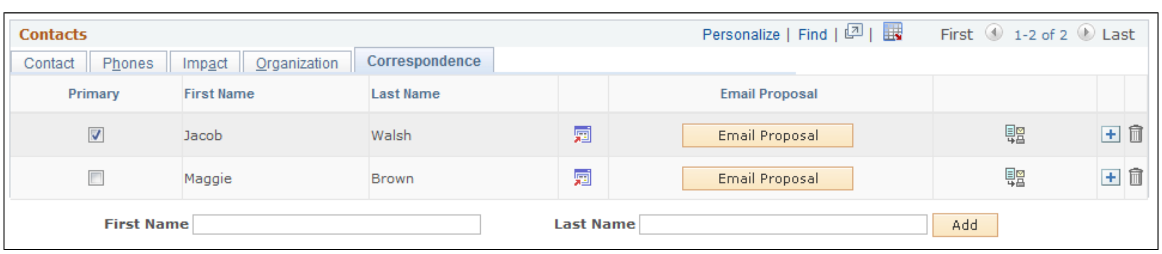
See Contact Title Page.

Correspondence

Select the Correspondence tab.

Image: Lead - Discover page: Correspondence tab

This example illustrates the fields and controls on the Lead - Discover page: Correspondence tab.



See Sending Sales Proposals or Quotes to Customers.

Cloning a Sales Lead or Opportunity

This topic discusses how to clone an existing sales lead or opportunity.

Page Used to Clone a Sales Lead or Opportunity

Page Name	***Definition Name***	***Usage***
Clone Lead Page	RB_CLONE_TXN_SEC	Clone a lead.
Clone Opportunity Page	RB_CLONE_TXN_SEC	Clone an opportunity.

Clone Lead Page

Use the Clone Lead page (RB_CLONE_TXN_SEC) to clone a lead.

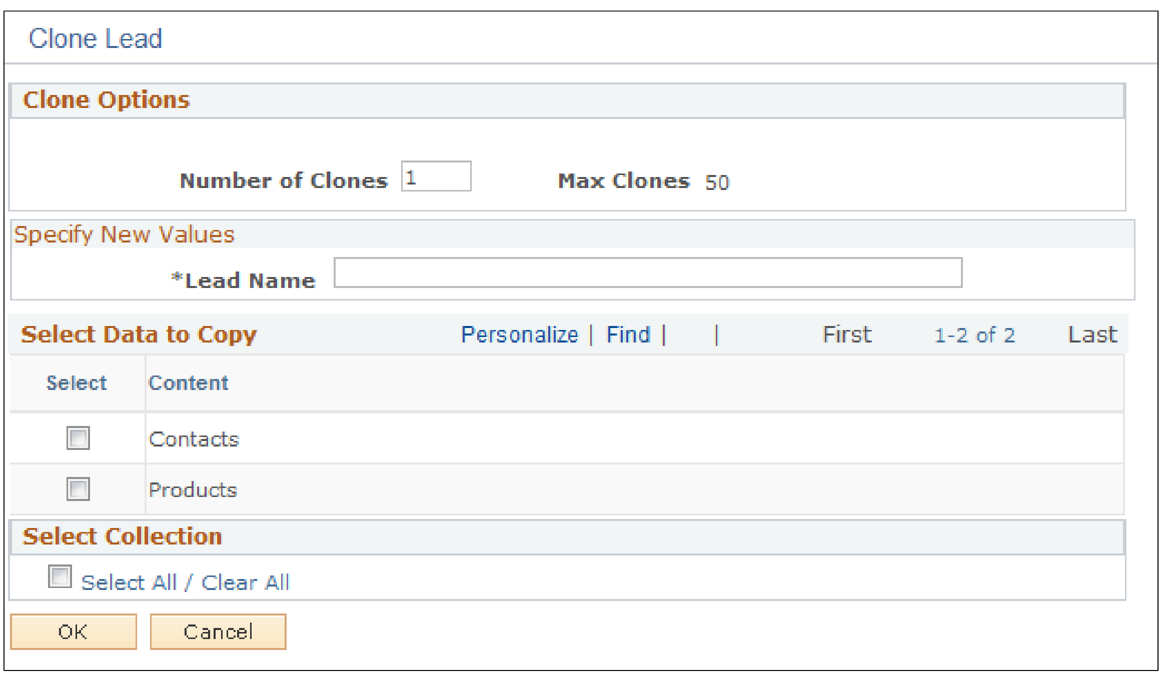
Navigation

Click the Clone button on the toolbar of a lead.

Note: Although the following example shows the Clone Lead page, the information also applies to the Clone Opportunity page.

Image: Clone Lead page

This example illustrates the fields and controls on the Clone Lead page.



Note: A setup component for cloning is available and it, if enabled, allows implementers to specify the behavior and options available for cloning leads and opportunities, which is then displayed on this page. This component is delivered as *hidden* from the portal navigation (under Set Up CRM, Product Related, Sales, Lead and Opportunity) and PeopleSoft CRM recommends that the cloning capability be used as delivered. Any modification to this setup component (for example, making it visible on the portal navigation, changing field values or options, and so on) is considered customization and is not supported by Oracle's Global Customer Support.

Number of Clones	Enter the number of copies that you want to make from the original lead or opportunity. The system creates the clones and appends the number of copies to the lead description.
Lead Name	Enter a name or description for the new lead or opportunity.
Select	Select the data to copy from the original to the clone.

Converting a Lead to an Opportunity

This section discusses how to convert a lead to an opportunity.

Page Used to Convert a Lead to an Opportunity

Page Name	***Definition Name***	***Usage***
Convert Lead to Opportunity Page	RSF_LE_OPP_SEC	Convert a lead to an opportunity.

Convert Lead to Opportunity Page

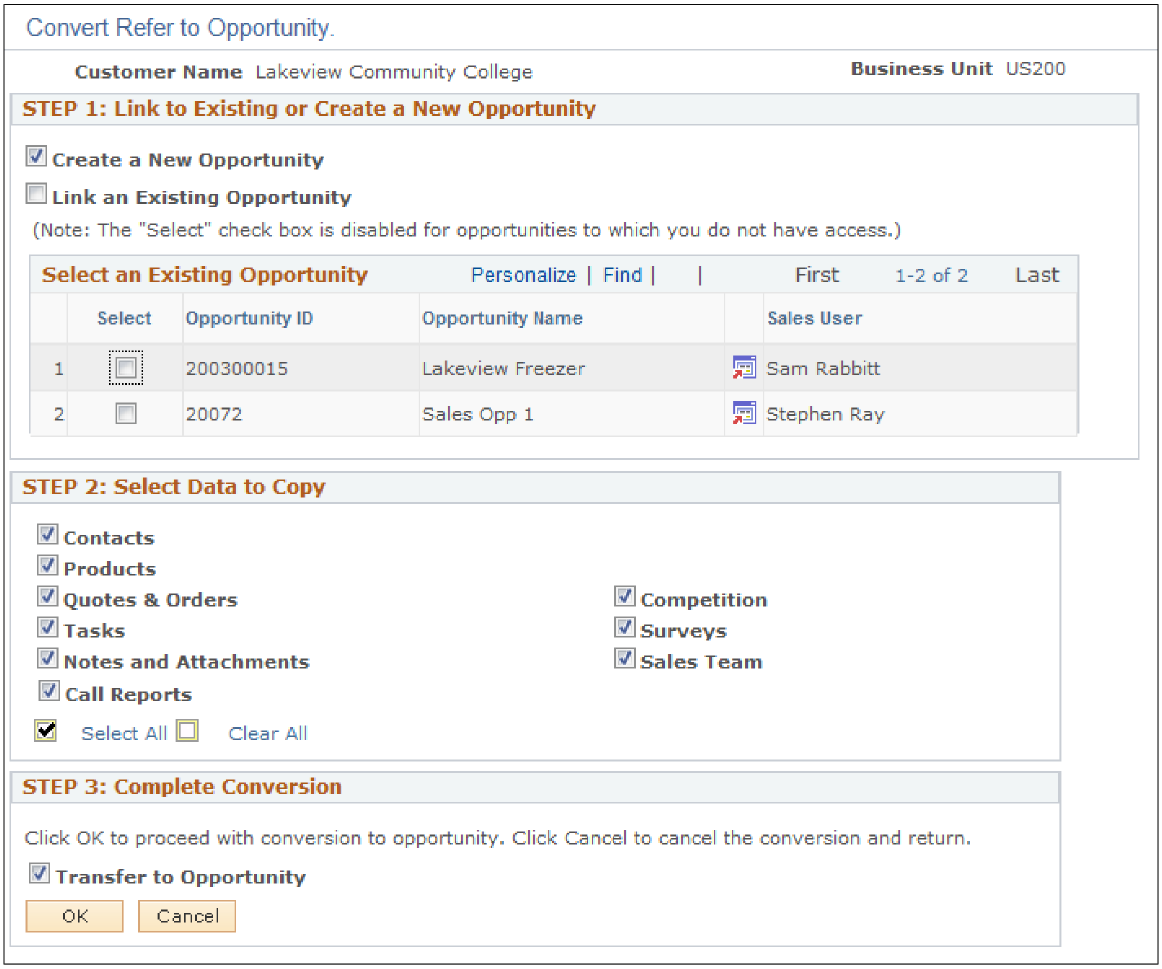
Use the Convert Lead to Opportunity page (RSF_LE_OPP_SEC) to convert a lead to an opportunity.

Navigation

Click the Convert button on the toolbar of a lead.

Image: Convert Lead to Opportunity page

This example illustrates the fields and controls on the Convert Lead to Opportunity page.



Converting Prospects to Customers

When converting a lead to an opportunity, if the lead is a prospect, a new CDM customer is created using the prospect's information (the prospect is *pushed* to CDM). The lead and the opportunity are linked to the customer, and a link that provides navigation to the newly-created CDM customer appears. When converting a prospect lead to an opportunity, the customer name (for a company) or the first and last name (for a contact) must be present to push the prospect's information to the CDM. If these are not present, the lead is converted to an opportunity, but the information is not transferred to the CDM.

STEP 1: Link to Existing or Create a new Opportunity

Create New Opportunity	Select to convert the lead into a new opportunity.
Link an Existing Opportunity	Select to convert the lead by merging it into an existing opportunity.
Select Existing Opportunity	If you select the Link to an Existing Opportunity check box, select one of the opportunities in this grid. The grid displays a list of opportunities that have the same customer and business unit as the lead that is converted. You can select

only opportunities to which you have security access; the Select check box is not available for other opportunities.

Note: This region appears only if there are opportunities.

STEP 2: Select Data to Copy

Select the data to copy from the lead to the opportunity.

If you associate the lead with an existing opportunity, the system adds the selected information from the lead to the selected opportunity.

An option is available for Higher Education leads to copy academic information to target opportunities (new or existing).

STEP 3: Complete Conversion

Transfer to Opportunity

Select to transfer to the opportunity when you click OK.

If this check box is deselected, the system returns to the Leads page on which you clicked the OK button.

OK

Click to have the system save the opportunity to the opportunities list and the Opportunities details component. The opportunity is available for you to continue updating and managing it.

To immediately access the new opportunity upon successful conversion, select the Transfer to Opportunity check box before clicking OK.

Chapter 12

Importing Sales Leads

Understanding Data Import for Leads

You can import lead data into your system from an external comma-separated values (CSV) file. However, before you can import the data, you must create a database template to receive the data. You must also create an import map to identify the items from the spreadsheet that populate the various fields in the database template. A default template and map exist in the delivered database. You can use these as a model for creating other templates or maps.

You can upload a CSV spreadsheet (such as a Microsoft Excel spreadsheet), map the columns on the spreadsheet to fields in your database, and run an automated process to import the data from the spreadsheet into PeopleSoft Sales. You can import data from any comma-delimited spreadsheet, including spreadsheets from trade shows, or your own personal spreadsheets. When you import leads, the system stores the data in the Leads table and the Customer Data Model tables.

See "Understanding the Data Import Application Engine Process (RBIMPORT)" (PeopleSoft CRM 9.2: Business Object Management).

PeopleSoft Sales is shipped with a predefined lead-import template and map for importing lead data. When you upload a spreadsheet and select the import template and import map, the system displays a list of the column headings and the closest matching database field name. The system also provides other field names from which to choose for each column. If the system's automatic mapping produces the correct results, then select the columns to use and run the import process.

If the results of the automatic mapping are not correct, use the fields to select a different field name and column mapping. Then, name and save the map to make it available from the specified template in the future.

You can create and save as many maps as you want. You can also create new templates. When you create a template, the system automatically creates a default import map for you.

Note: To create import templates, you must have the proper security permissions in your sales access profile.

Related Links

Setting Up Templates for Importing Leads

Importing Sales Lead Data

This topic discusses how to:

- Import lead data from an external file.

- View a template definition.
- View lead import results.
- View lead import errors.
- Search for imported data.

Pages Used to Import Sales Lead Data

Page Name	***Definition Name***	***Usage***
Import Sales Leads Page	RB_IMP_RUN	Select the template, map, and spreadsheet for importing lead data and run the import process.
Lead Import Template Page	RB_IMP_TEMPL_DISPL	View a display-only version of the specified template's definition.
Sales Leads Import Results Page	RSF_LE_IMP_RESULTS	View results of the lead data import process.
Import Error Information Page	RSF_LE_VIV_ERR	View results of the lead data import process.
Batch Info Page All Imported Leads	RB_IMP_SEARCH	Search for imported lead data.

Import Sales Leads Page

Use the Import Sales Leads page (RB_IMP_RUN) to select the template, map, and spreadsheet for importing lead data and run the import process.

Navigation

Sales > Import Leads > Import Sales Leads

Image: Import Sales Leads page (1 of 2)

This example illustrates the fields and controls on the Import Sales Leads page (1 of 2).

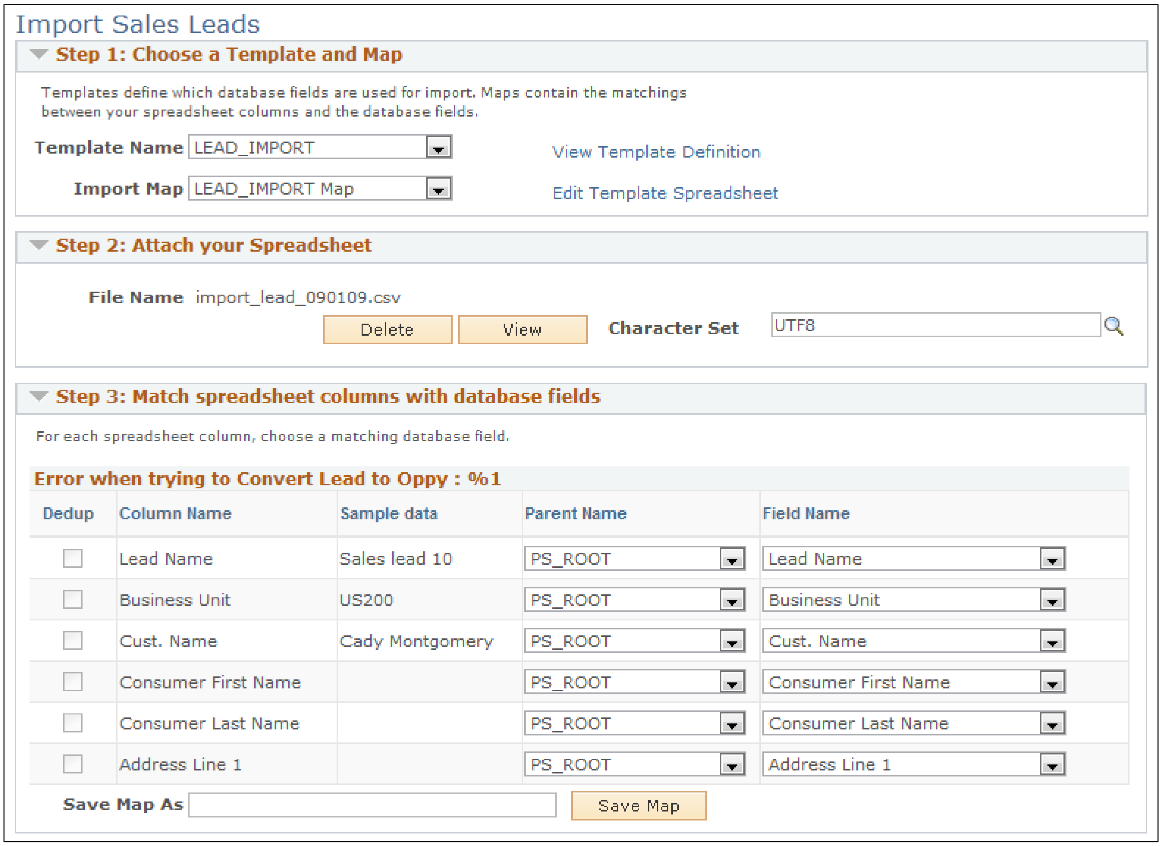
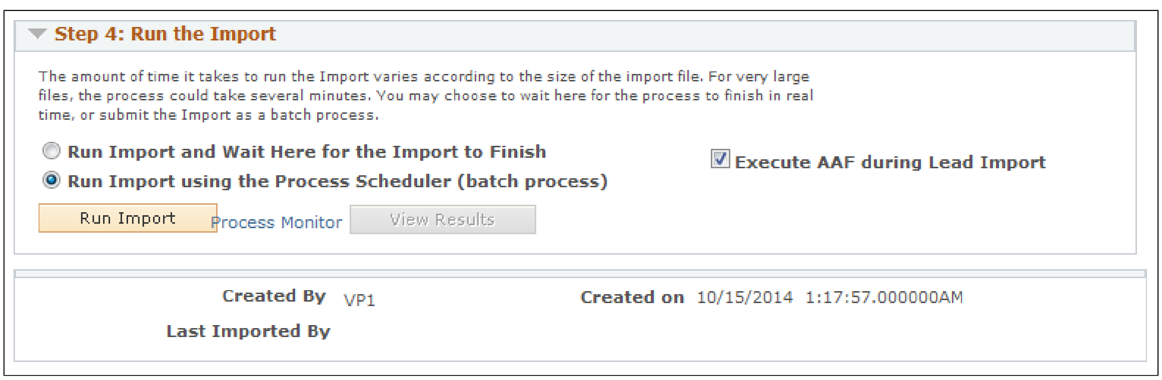


Image: Import Sales Leads page (2 of 2)

This example illustrates the fields and controls on the Import Sales Leads page (2 of 2).



Step 1: Choose a Template and Map

Template Name

Select the import template to use. Import templates identify the components that provide the database fields.

View Template Definition

Select to access a display-only version of the Import Template page for a specified template.

Import Map	Select the import map to use. The import map identifies which spreadsheet columns populate the various fields in your database, and it identifies which columns to import.
Edit Template Spreadsheet	Select to launch a new window with the Microsoft Excel spreadsheet template with column headings only. You can enter data (including placeholder data for required fields) or paste data from another spreadsheet. **Note:** If you make changes, be sure to save the spreadsheet before closing the window.

Step 2: Attach the Spreadsheet

Add	Click to access the search page, where you can enter or browse for the path to the comma-delimited file of lead data to import.
Upload	Click to upload the file after identifying the path to the file. The system loads the spreadsheet and attempts to map the spreadsheet columns to the database fields identified on the selected template and map. The system accesses the Import Sales Leads page and displays the name of the uploaded file and mapping results.
Delete	Click to delete the uploaded file. The Add button appears. Click Add to browse for a different file to upload.
View	Click to open a new window where you can view the uploaded spreadsheet to confirm that it is the correct spreadsheet to use.

Step 3: Match spreadsheet columns with database fields

If the columns and fields are acceptable as mapped, run the import process by selecting options in the Step 4: Run the Import group box.

If the automatic mapping is not acceptable, use the fields labeled Parent Name and Database field name to select the correct field for each column. Then enter a map name in the Save Map As field, and click Save Map. The map appears in the map drop-down list for that template.

Note: The Dedup check boxes indicate data that the system uses to check for duplicates. You specify the data for determining duplicates when you create the template definition. If you have the necessary permissions, you can edit the Dedup check boxes used for determining duplicates.

See Setting Up Templates for Importing Leads.

Step 4: Run the Import

Specify how the import runs—in real time or in a batch process at a later time.

Run Import	Click to submit the run request to the system.
View Results	Click to view import results after the process has run.

Process Monitor	Click to access the Process List page, where you can confirm that the request was received and determine its status.
Execute AAF during Lead Import	Select to launch the Active Analytics Framework policies when an imported lead contains the necessary conditions to trigger execution.

Lead Import Template Page

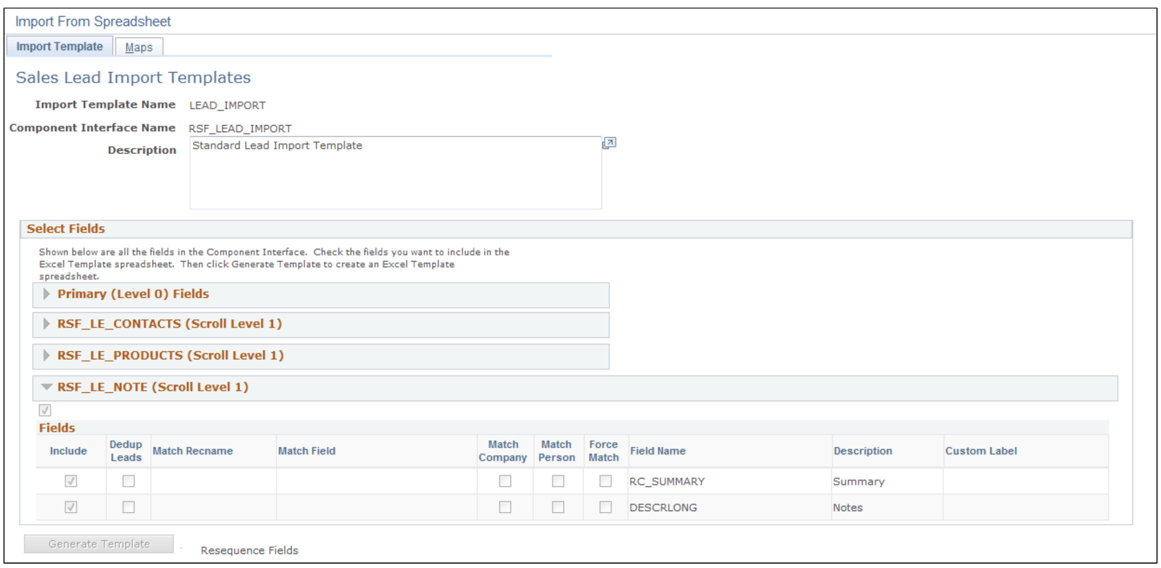
Use the Lead Import Template page (RB_IMP_TEMPL_DISPL) to view a display-only version of the specified template's definition.

Navigation

Click the View Template Definition link on the Import Sales Leads page.

Image: Sales Lead Import Templates page

This example illustrates the fields and controls on the Sales Lead Import Templates page.



This page is a display-only version of the Import Template page, so that you can view the template definition. To create or edit an import template, you must access the editable version of this page if your PeopleSoft Sales access profile permits.

See Setting Up Templates for Importing Leads.

Sales Leads Import Results Page

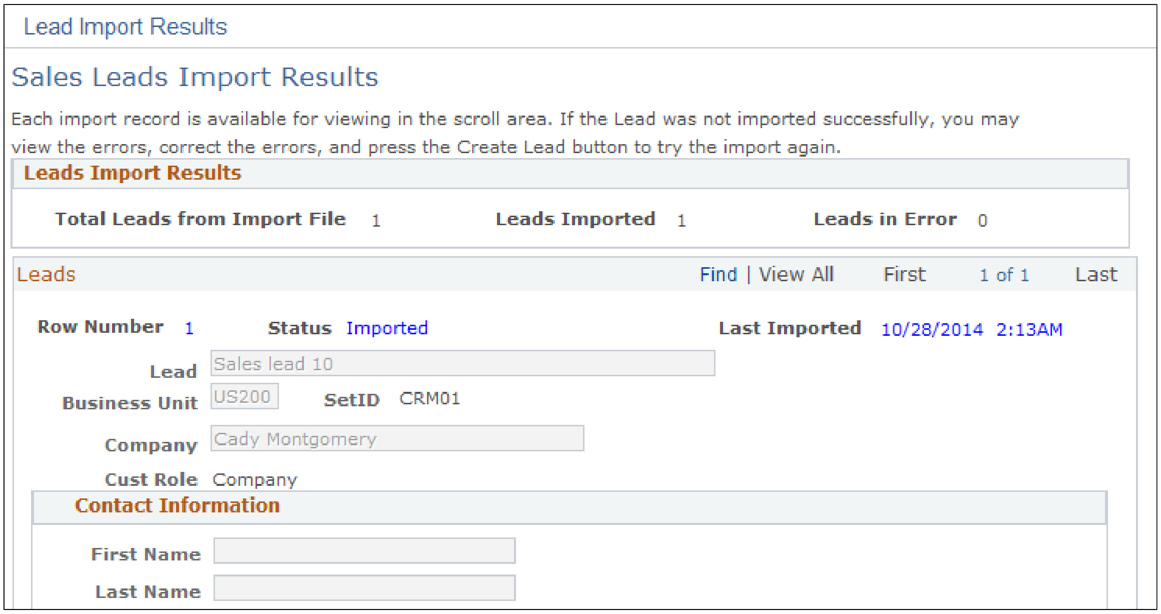
Use the Sales Leads Import Results page (RSF_LE_IMP_RESULTS) to view results of the lead data import process.

Navigation

Click the View Results button on the Import Sales Leads page.

Image: Sales Leads Import Results page

This example illustrates the fields and controls on the Sales Leads Import Results page.



View the details of each lead that was imported. Edit imported data as necessary.

When the data is correct, click Submit All to submit all lead data without further adjustment.

If a lead is a prospect, you can leave it as a prospect or push it to the CDM.

Note: For customers, the Customer field is displayed as a link; for prospects, it is displayed as an editable field.
If an imported lead has a sales representative's person ID in an ID column, the system assigns the lead to that representative. If the imported lead has no person ID and the Auto Assign check box is selected, the system assigns a sales representative by using a territory tree. If the imported lead has no person ID and the Auto Assign check box is not selected, the lead is not assigned. You can search for unassigned leads on the Search Leads page.
If the imported lead does not have a rating, it is subject to auto rating.

See Setting Up Assignment Weights, Setting Up Lead Ratings.

Import Zone

If errors occurred during the import process, the Import Zone group box appears.

View Errors	Click to access the Import Errors page, where you can determine the errors that occurred.
Create Lead	Click to import leads one by one. Each time that you click this button, the system submits only the lead that appears in the Leads group box.

Related Links

Setting Up Templates for Importing Leads

Import Error Information Page

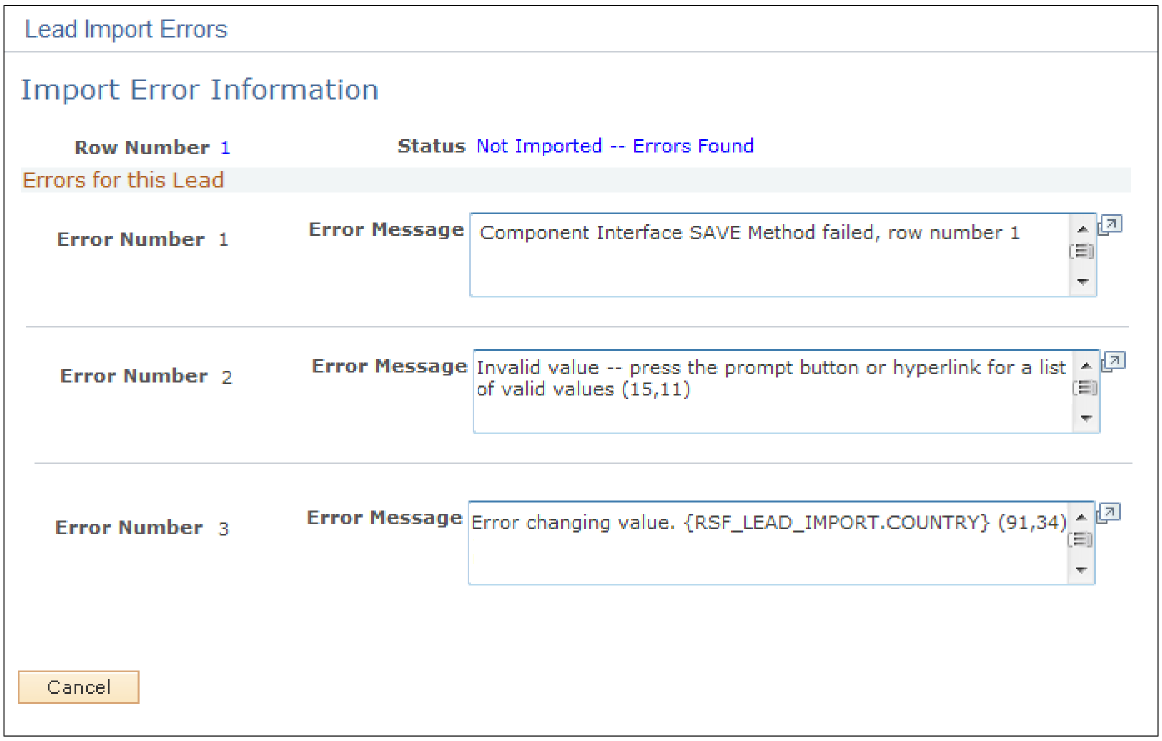
Use the Import Error Information page (RSF_LE_VIV_ERR) to view results of the lead data import process.

Navigation

Click the View Errors button on the Sales Lead Import Results page.

Image: Import Error Information page

This example illustrates the fields and controls on the Import Error Information page.



Determine the nature of each import error so that you can decide how to fix it.

Batch Info Page

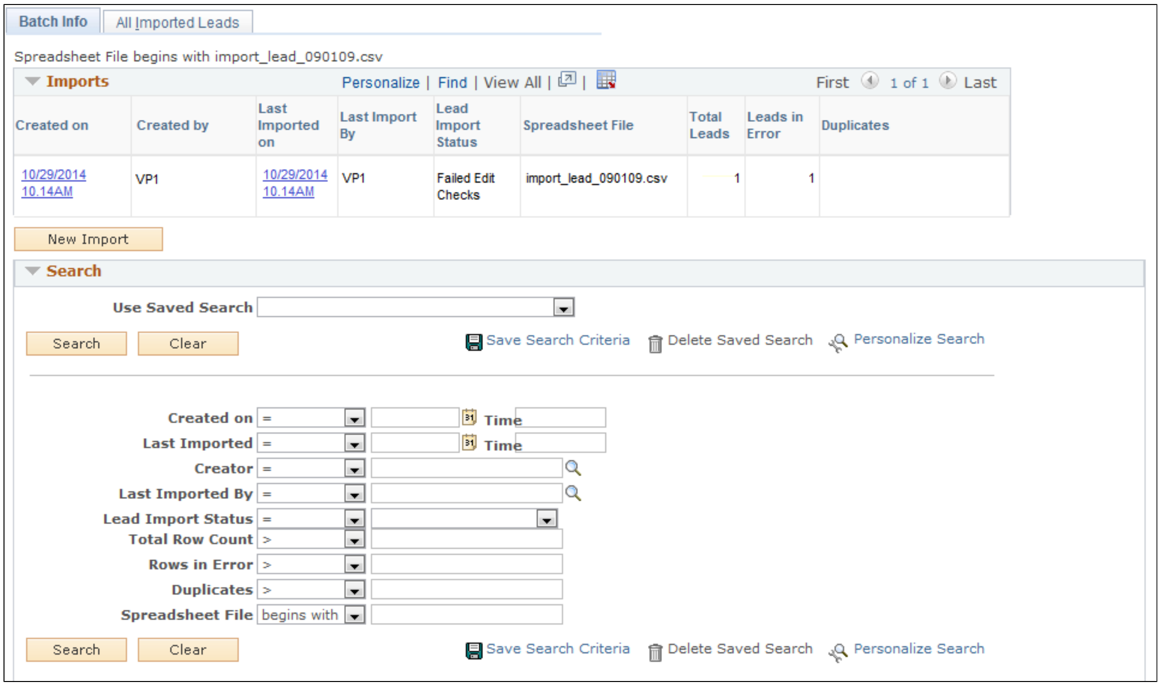
Use the Batch Info (batch information), page (RB_IMP_SEARCH) to search for imported lead data.

Navigation

- Sales > Search Imported Leads > Batch Info
- Sales > Search Imported Leads > All Imported Leads

Image: Batch Info page

This example illustrates the fields and controls on the Batch Info page.



Use the Batch Info page to search for and view a list of imported lead data by run parameters.

Use the All Imported Leads page Sales >Search Imported Leads >All Imported Leads to search for and view a list of imported leads data by lead parameters.

Related Links

"Configuring Searches" (PeopleSoft CRM 9.2: Automation and Configuration Tools)

Chapter 13

Assigning a Lead or Opportunity

Understanding Sales Representative Assignment

Sales representatives can be assigned to leads or opportunities using one of these methods:

- You can *manually* select sales representatives or a sales team to assign to leads or opportunities.
- You can enable configuration options to invoke the assignment engine to *automatically* select sales representatives based on the account teams that are associated with the customers of leads or opportunities.

  Note: If this option is enabled, it takes precedence over the other assignment methods in which the assignment engine is used.

- You can enable a configuration option to invoke the assignment engine to *automatically* generate a list of sales representatives from the highest ranked territories and then manually select representatives from the list.

  The assignment engine uses options and criteria specified for the assignment group to determine the highest ranked territories.

- You can enable a configuration option to invoke assignment engine to *automatically* select a sales representative based on options and criteria that you specify for the assignment group.

See Setting Up Account-Based Assignment Options.

See Configuring Assignment Criteria.

Automatic Sales Representative Assignment

The assignment engine is triggered to perform sales representative assignment on leads and opportunities when one of these events occurs:

- When a sales representative clicks the Find Sales Rep button on the Assign page.
- When a lead or opportunity is saved in add mode, or when leads are being imported.

  See Setting Up Functional Options.

- When the Lead or Opportunity component interface is invoked.

The assignment engine uses one of these mechanisms to assign sales representatives, in this order:

1. Customer account-based: If this feature is enabled (it is disabled by default), the engine assigns all account team members or team owners (who are also sales users) of the customer that is associated with the lead or opportunity.

If this feature is disabled, or the engine cannot retrieve a matching account team or team owners successfully due to insufficient information, the territory-based mechanism is used.

2. Territory-based: The engine assigns sales representatives based on the configuration of assignment group and assignment criteria that is specified for a territory tree.

   Any potential sales representative has to be a sales user (established in the Sales Users component) who belongs to at least one territory in order to be considered for territory-based assignment.

Related Links

Setting Up Account-Based Assignment Options

Configuring Assignment Criteria

Higher Education Enhancements

Higher Education enhancements on the Assign page apply to both Higher Education leads and Higher Education opportunities. They are:

- Renaming of *Sales Rep* to *Recruiter*.
- Renaming of *Sales Team Members* to *Recruiting Team Members*.
- Renaming of *Sales Team* to *Recruiting Team*.

The system delivers a assignment group called *HE_SALES* to support the automatic assignment of recruiters and recruiting teams for Higher Education leads and opportunities. Refer to this see reference for more information on the assignment group.

See Higher Education for Sales.

Common Elements Used in Sales Representative Assignment

New Rep (new representative)	Select the sales representative to assign to a lead, opportunity, or account on a reassignment worksheet.
New Territory	Select the territory for a sales representative on a reassignment worksheet.

Assigning Sales Representatives to a Lead or Opportunity

This topic discusses how to:

- Assign sales representatives.
- Select sales representatives to assign.
- Maintain data for the sales representative assignment.

Pages Used to Assign Sales Representatives to a Lead or Opportunity

Page Name	***Definition Name***	***Usage***
Search Leads Page	RSF_LEADS_HOME_GRD	Search for leads.
Lead - Assign Page	RSF_LEAD_ASSIGN	Assign a sales representative to the lead.
Search Opportunities Page	RSF_OPP_HOMEPAGE	Search for opportunities.
Opportunity - Assign Page	RSF_OPP_ASSIGN	Assign a sales representative to the opportunity.
Sales Rep Page	RSF_ASSIGN_TEAM_L	Manually select sales representatives for the lead, and specify the primary lead team representative. The page appears only if the assignment configuration is set to manual selection.
Sales Rep (sales representative) Page	RSF_ASSIGN_TEAM_O	Manually select sales representatives for the opportunity, and specify the primary opportunity team representative. The page appears only if the assignment configuration is set to manual selection.
Organization Page	RSF_TR_HTREE_SEC	View the organization or territory to which the representative belongs.

Opportunity - Assign Page

Use the Opportunity - Assign page (RSF_OPP_ASSIGN) to assign a sales representative to the opportunity.

Navigation

- Sales > Search Opportunities > Opportunity - Assign
- Sales > Search Opportunities > Opportunity - Summary

  Click the Add Team link on the Opportunity - Summary page.

Note: The Assign page appears in both the Lead component and the Opportunity component. Although the following example shows the Opportunity component, the information provided applies to both leads and opportunities.

Image: Opportunity - Assign page (1 of 2)

This example illustrates the fields and controls on the Opportunity - Assign page (1 of 2).

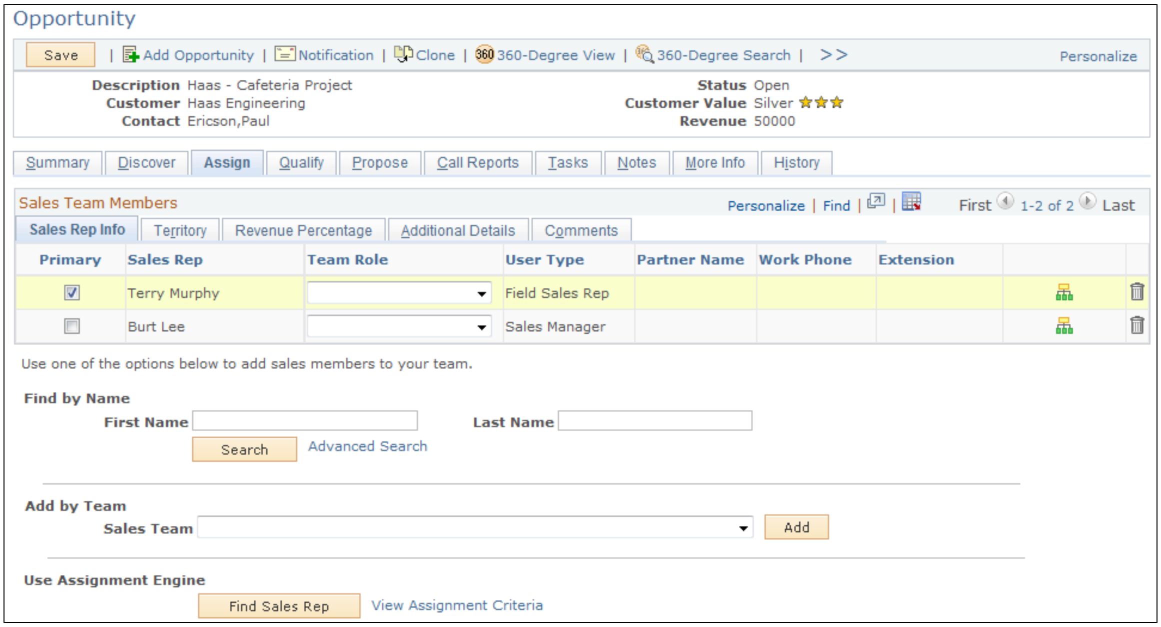
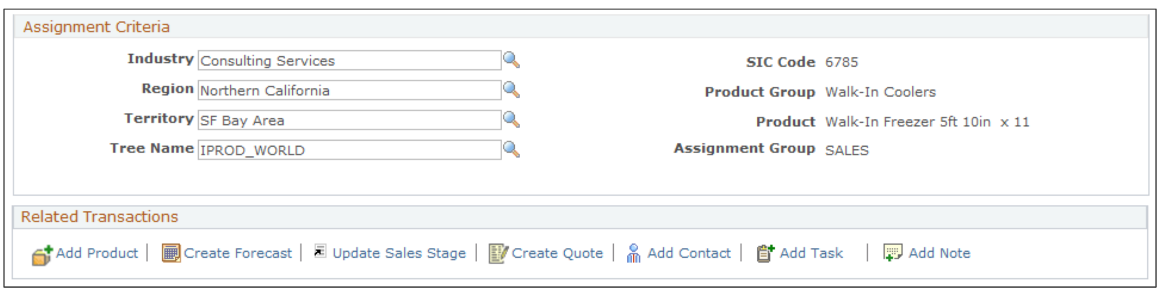


Image: Opportunity - Assign page (2 of 2)

This example illustrates the fields and controls on the Opportunity - Assign page (2 of 2).



Note: If the lead was converted to an opportunity, fields are unavailable on the Lead - Assign page. Use the Opportunity - Assign page to update the data.

Sales Team Members

This section captures the information about sales representatives that are assigned (manually or automatically) to the lead or opportunity.

See Lead - Assign Page.

Find by Name

The same mechanism is used for manually assigning sales representatives to leads and opportunities.

First Name and **Last Name**	Enter the first name, last name, or both (full or partial) of the sales user to add to the Sales Team Members section of the lead or opportunity as sales team members.

Only sales users, whether or not associated with a tree or territory, who belong to the same business unit as the lead or opportunity are available for selection.

Add by Team

Sales Team

Select a sales team from the list to assign to the lead or opportunity. All of the active sales teams defined in the system are available for selection. When you select a sales team to add to the lead or opportunity, the system populates all its members to the Sales Team Members section, regardless of business unit or whether or not they are associated with trees or territories.

Sales teams are defined on the Sales Team page.

See Setting Up Sales Teams.

Use Assignment Engine

Find Sales Rep (find sales representative)

Click to initiate the assignment engine to assign sales representatives to the lead or opportunity. Assignment is performed using one of these methods:

- If you have enabled the customer account-based assignment options for leads and opportunities, the system finds the best suited sales representatives based on the account teams (owners or the whole team) that are associated with customers of the leads and opportunities.

  If customers are not associated with any accounts, the selected assignment mode for the assignment group is used.

- If you have set the assignment mode on the assignment group to *Automatic Assignment,* the system finds the best suited sales representatives based on the assignment criteria and enters that sales representative's data in the Sales Team Members section of the page.

- If you have set the assignment mode on the assignment group to *Manual Selection,* the list of sales representatives on the Sales Rep page appears so that you can select the sales representative for assignment to the lead or opportunity.

  See Sales Rep Page.

The second and third methods are generally known as territory-based assignment, in which the assignment of sales representatives is controlled by the setting of the assignment group that is associated with the transaction's business unit. For example, you can set up the system to restrict the assignment of leads and opportunities only to sales users of the same business unit.

Note: If the lead or opportunity has one existing primary sales representative and the assignment engine returns a new primary sales representative, the system replaces the old primary representative with the new primary representative and moves the revenue allocation from the old primary representative to the new primary representative.
If the lead or opportunity has multiple existing primary sales representative and the assignment engine returns a new primary sales representative, the system adds the new representative as the primary representative and keeps the existing representatives.

See Assign Group Page.

View Assignment Criteria Click to display the assignment criteria on the page. Typically, you do not change the fields in the Assignment Criteria section. However, the system does allow you to edit the Industry, Region, Territory, and Tree Name fields.

This link acts as a toggle. If the Assignment Criteria section is currently displayed, clicking the link causes it to not display.

Assignment Criteria

Industry The system populates this field with the industry, if any, associated with the customer on the Discover page.

Region The system populates this field with the region, if any, associated with the customer on the Discover page.

Territory If you used the assignment engine to assign a primary sales representative, the system populates this field with the territory associated with the primary sales representative.

Tree Name The system populates this field with the default territory tree for the primary sales representative.

SIC Code (standard industrial classification code) Displays the SIC code, if any, associated with the industry.

Product Group and **Product** Displays the primary product information from the Product grid on the Propose page.

Assignment Group Displays the default assignment group for the business unit.

Sales Rep Page

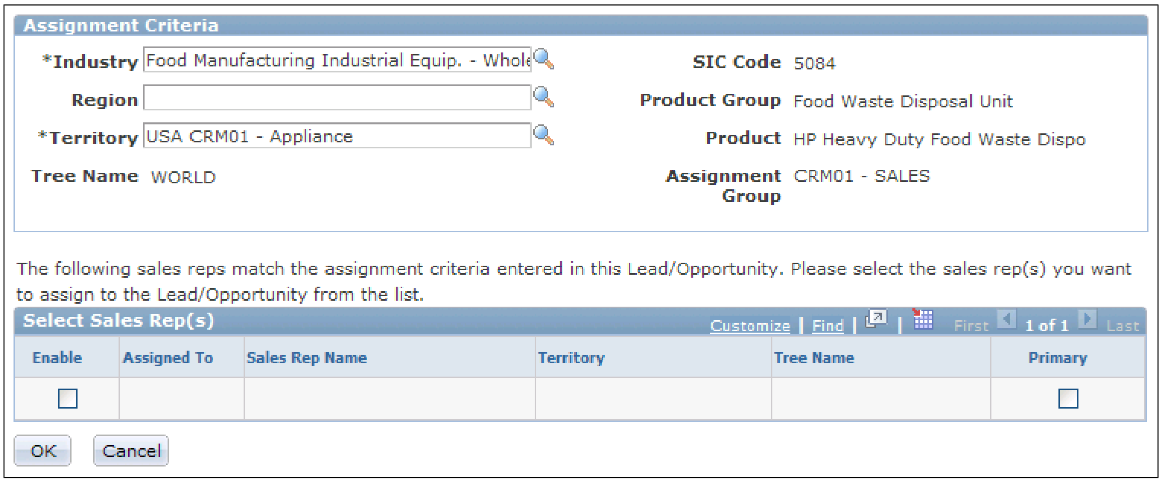
Use the Sales Rep (sales representative) page (RSF_ASSIGN_TEAM_L) to manually select sales representatives for the lead, and specify the primary lead team representative.

Navigation

Click the Find Sales Rep button on the Lead - Assign page.

Image: Sales Rep page

This example illustrates the fields and controls on the Sales Rep page.



This page, with the list of candidates for assignment, is available only if the assignment mode of the associated assignment group is *manual selection*. Select the sales representatives to assign to the lead or opportunity.

If the sales representative that you want to assign to the lead or opportunity does not appear in this search result, add the representative manually in the Find by Name section of the Assign page.

Enable	Select to assign the sales representatives to the lead or opportunity.
Primary	Select to indicate the sales representative as primary for the lead or opportunity. You can have only one primary representative for each lead or opportunity. In that case, you can have two primary representatives—one external and one internal.

Click the OK button to complete the assignment and return to the Assign page, which displays the name, territory, and associated industry and region, if any, of selected sales representatives.

Lead - Assign Page

Use the Lead - Assign page (RSF_LEAD_ASSIGN) to assign a sales representative to the lead.

Navigation

Sales > Search Leads > Lead - Assign

Sales Rep Info Tab

Select the Sales Rep Info (sales representative information) tab in the Sales Team Members section.

Primary	Select to indicate the primary member of the sales team. Only one primary member can be selected, and that person should

be the sales representative to whom the lead or opportunity is assigned. Only the primary sales representative is listed on many pages for the lead or opportunity.

Team Role

Select the role of the sales representative on the team (for example, *Legal, Manager, Team Leader,* and so on).

See Sales Team Page.

User Type

Displays the sales user type associated with the sales representative on the Sales User page.

See Setting Up Sales Users.

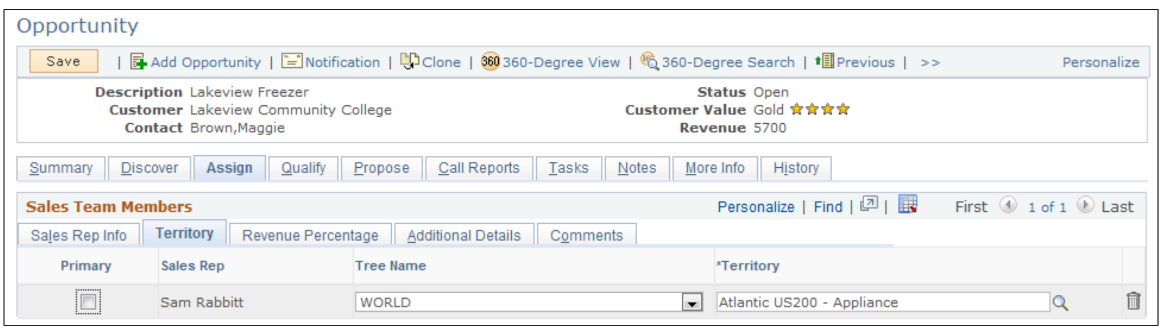
Click to access the Organization page, where you can view the organization or territory to which the representative belongs.

Territory Tab

Select the Territory tab in the Sales Team Members section.

Image: Opportunity - Assign page: Territory tab

This example illustrates the fields and controls on the Opportunity - Assign page: Territory tab.



Tree Name

After a sales representative is added to the lead or opportunity, the system displays the tree name for the sales representative as defined on the Sales User page.

Territory

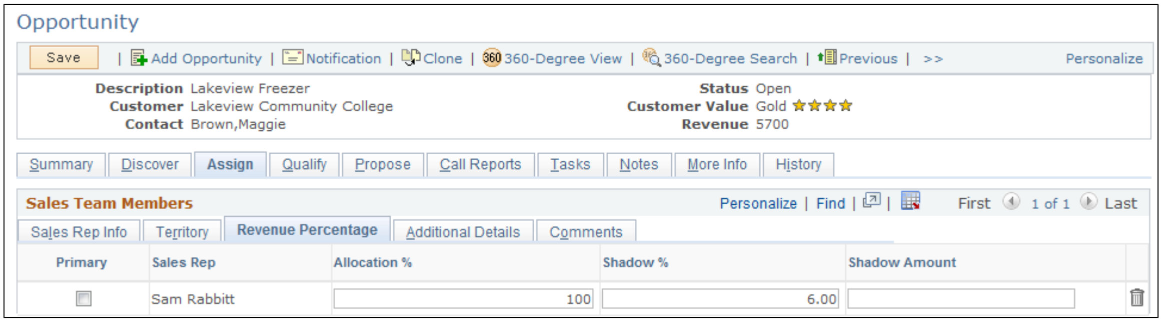
After a sales representative is added to the lead or opportunity, the system displays the primary territory for the sales representative as defined on the Sales User page.

Revenue Percentage Tab (Opportunities Only)

Select the Revenue Percentage tab in the Sales Team Members section of the Opportunity - Assign page.

Image: Opportunity - Assign page: Revenue Percentage tab

This example illustrates the fields and controls on the Opportunity - Assign page: Revenue Percentage tab.



On this tab, you specify how revenues for the opportunity are allocated among the sales team. Revenue allocations are required for forecasting and for compensation calculations when you integrate with PeopleSoft Sales Incentive Management.

See Understanding Forecast Functionality in PeopleSoft Sales.

Note: Revenue allocations are required for an opportunity to roll up into pipelines and forecasts. Only opportunities roll up into pipelines and forecasts. You cannot include leads in pipelines and forecasts. Therefore, the Revenue Percentage tab appears in the Opportunity component only. The Revenue Percentage tab has no equivalent for the sales team in the Lead component.
Typically, only sales managers and administrators have access to the Revenue Percentage tab. Access depends on the setting in the user's sales access profile.

Allocation % (allocation percentage)	Enter the percentage of the opportunity's revenue that is credited to the sales representative. The sum of the allocation percentages must equal 100 percent.
Shadow % (shadow percentage)	Enter the percentage of the opportunity's revenue that is credited to the sales representative when calculating performance against quotas. The sum of the allocation percentages does not need to equal 100 percent. You can use this field to give a secondary sales representative partial credit for an opportunity's revenue.
Shadow Amount	Enter a dollar amount that is credited to the sales representative when calculating performance against quotas. The system calculates the total shadow forecast for a sales representative by multiplying the estimated revenue by the shadow percentage and then adding the shadow amount.

Additional Details Tab

Select the Additional Details tab in the Sales Team Members section.

The system displays additional information about each team member, including company name, country code, and cell phone number. The information comes from the Person record or the Sales User page.

Comments Tab

Select the Comments tab in the Sales Team Members section.

Enter comments to describe a sales team member.

Accepting, Rejecting, or Turning Back a Lead Assignment

This topic discusses how to accept, reject, or turn back a lead assignment.

Note: You can accept, reject, or turn back the assignment of only leads. You cannot accept, reject, or turn back the assignment of an opportunity. Therefore, the Accept/Reject Lead section appears on the Assign page only in the Lead component. The Accept/Reject page has no equivalent in the Opportunity component.

Pages Used to Accept, Reject, or Turn Back a Lead Assignment

Page Name	*Definition Name*	*Usage*
Search Leads Page	RSF_LEAD_ENTRY	Search for an existing lead.
Lead - Summary Page	RSF_LEAD_SUMMARY	Accept, reject, or turn back a lead assignment.

Lead - Summary Page

Use the Lead - Summary page (RSF_LEAD_SUMMARY) to accept, reject, or turn back a lead assignment.

Navigation

Sales > Search Leads > Lead - Summary

Image: Lead - Summary page (1 of 2)

This example illustrates the fields and controls on the Lead - Summary page (1 of 2).

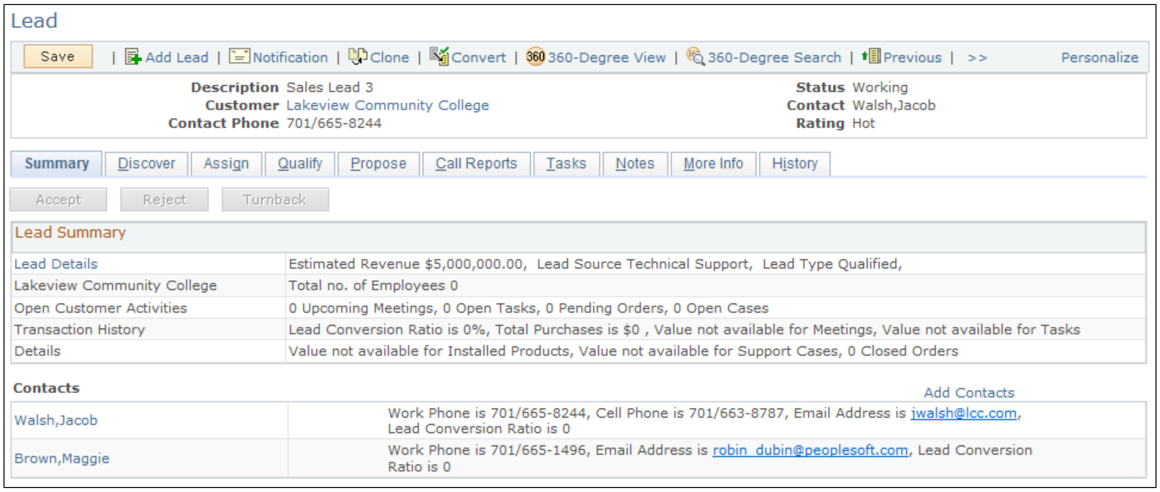
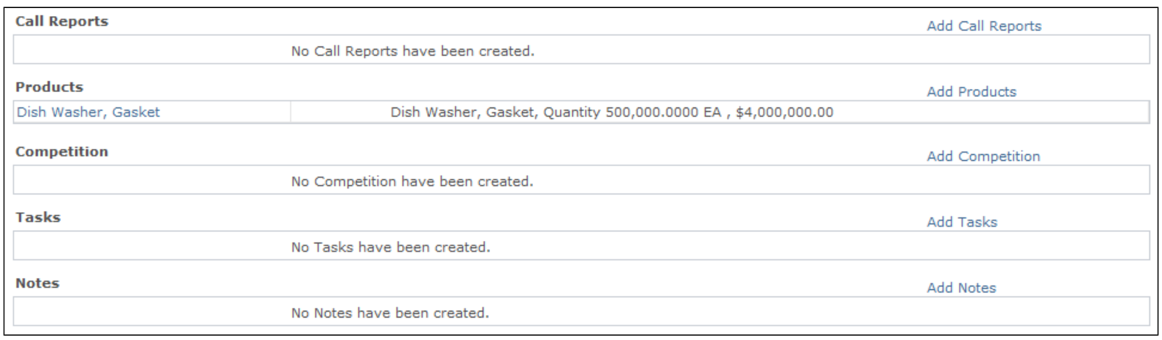


Image: Lead - Summary page (2 of 2)

This example illustrates the fields and controls on the Lead - Summary page (2 of 2).



You can accept, reject, or turn back a lead that has the status of *New* or *Open.* Lead workflow rules trigger the appropriate email or worklist notifications when a lead is not accepted or is rejected within the maximum delay time associated with the lead rating.

Accept

Click to accept the lead.

The system changes the lead status to *Accepted* and makes the lead available for you to work on, convert to an opportunity, and close the sale.

You cannot leave an accepted lead unassigned. If the lead is unassigned when it is accepted, the system assigns it to the sales user who accepts it. That user can assign the lead to another representative only if the Manually Reassign Leads option is selected on the user's sales access profile.

Reject

Click to reject the lead.

If your sales access profile enables you to reassign leads manually, you can assign the lead to another representative.

Turnback	Click to clear your name from the lead and turn back the lead to the list of active unassigned leads so that it can be assigned to someone else. If your sales access profile allows you to reassign leads manually, you can assign the lead to another representative.
Reason and **Comments**	These fields appear when you reject or turn back a lead. Select reasons for not accepting the lead. You can also enter comments to describe the reason.

Reassigning a Sales Representative's Leads, Opportunities, and Accounts

This topic discusses how to:

- Reassign a sales representative's leads, opportunities, and accounts.
- Review reassignment worksheets.

Note: When you reorganize a tree, the system automatically reassigns leads, opportunities, and accounts within the new structure. You can generate worksheets to view the automated reassignments and adjust them. This reassignment is discussed in the documentation on tree reorganization.

See Understanding Tree Reorganization\.

Pages Used to Reassign a Sales Representative's Leads, Opportunities, and Accounts

Page Name	***Definition Name***	***Usage***
Reassign Sales Activities Page	RSF_TR_REASSIGN	Reassign all of a sales user's leads and opportunities to another sales representative.
Lead Reassignment Worksheet Page	RSF_TR_REASS_LEAD	Preview the system's reassignment selections for a sales representative's leads and make changes before submitting. You can manually assign the leads to different sales representatives.
Opportunity Reassignment Worksheet Page	RSF_TR_REASS_OPP	Preview the system's reassignment selections for a sales representative's opportunities and make changes before submitting. You can manually assign the opportunities to different sales representatives.

Page Name	Definition Name	Usage
Account Reassignment Worksheet Page	RSF_TR_REA_ACCT	Preview the system's reassignment selections for a sales representative's accounts and make changes before submitting. You can manually assign the accounts to different sales representatives.

Reassign Sales Activities Page

Use the Reassign Sales Activities page (RSF_TR_REASSIGN) to reassign all of a sales user's leads and opportunities to another sales representative.

Navigation

Sales > Reassign Sales Activities > Reassign Sales Activities

Image: Reassign Sales Activities page (1 of 2)

This example illustrates the fields and controls on the Reassign Sales Activities page (1 of 2).

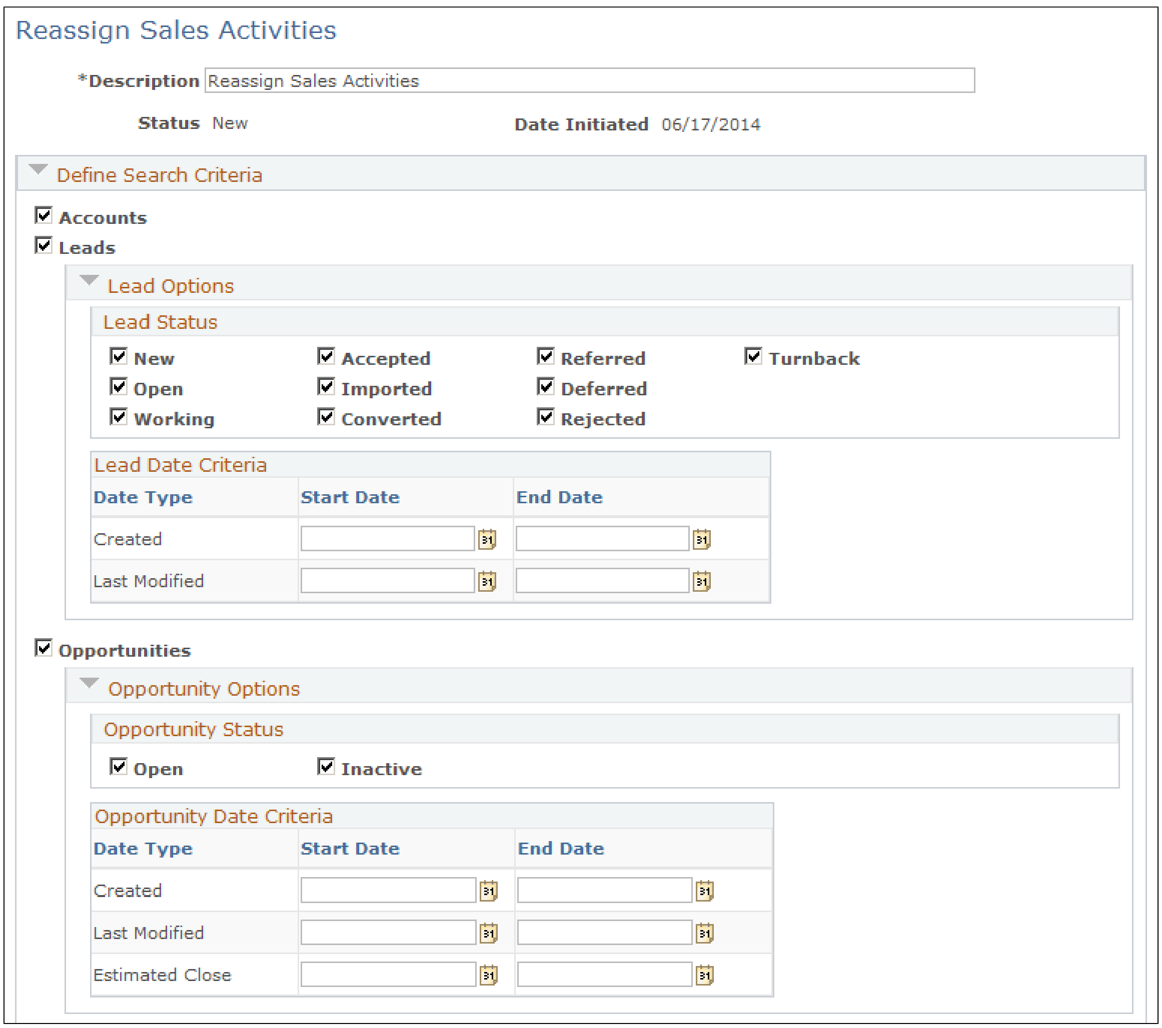
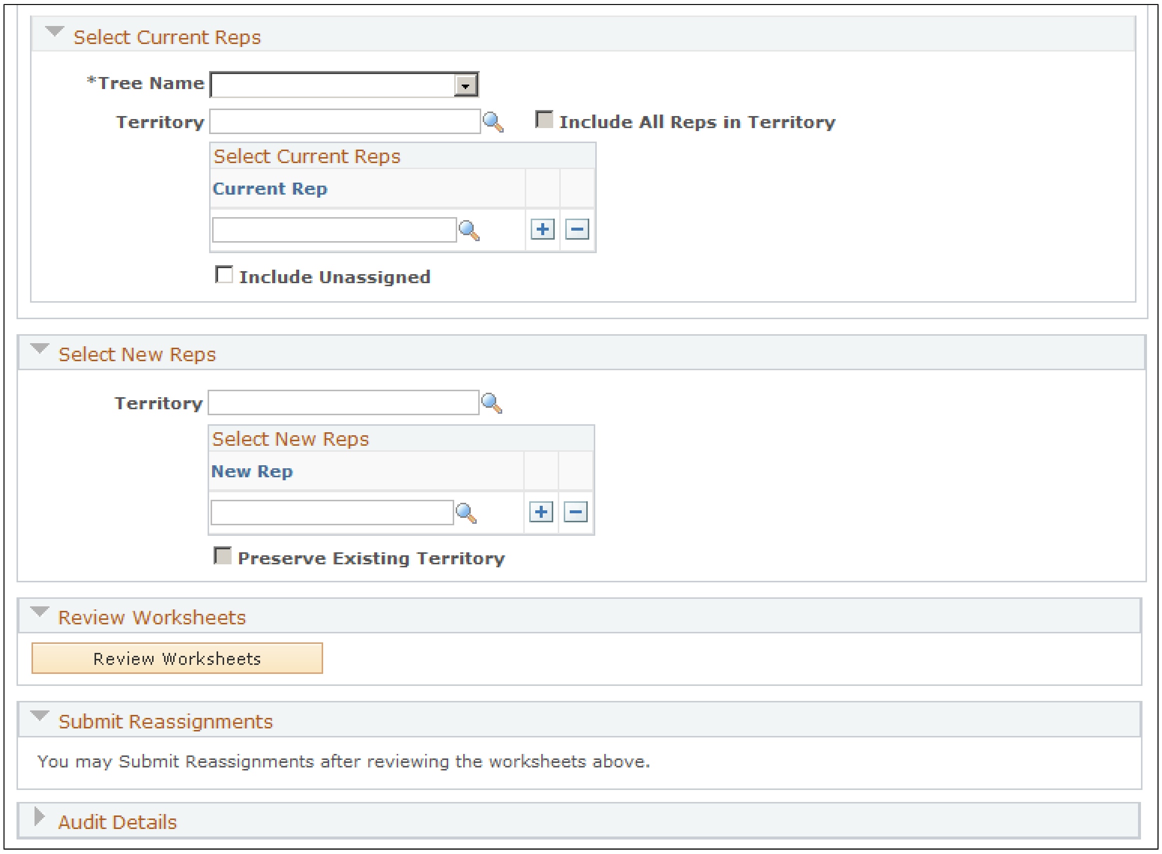


Image: Reassign Sales Activities page (2 of 2)

This example illustrates the fields and controls on the Reassign Sales Activities page (2 of 2).



Sections on this page represent ordered steps that you perform in the sales activity reassignment process. This page enables you to:

- Specify filtering options for including leads and opportunities in the reassignment process.
- Reassign sales activities from a territory or multiple sales representatives to another territory or other sales representatives.
- Perform a territory-only update of leads and opportunities without changing the sales representative assignment.
- Reassign unassigned leads and opportunities only, or in addition to the reassignment options that are already set up.

The appearance and behavior of fields and links change dynamically as you select an option or enter a field value.

Description	Enter a description for the reassignment exercise. The description is required before you can generate worksheets.
Status	Displays the current status of the reassignment. Values are *New, In Progress, Reviewed,* and *Submitted.*

Define Search Criteria

Use this section to select the types of sales activities (accounts, leads, and opportunities) to include in the reassignment process. By default, all are enabled. For leads and opportunities, additional filter criteria can be specified to refine the final set of objects for reassignment.

Accounts

Select the check box to include accounts in the reassignment process. Search criteria are not supported in accounts.

Leads and **Lead Options**

Select the check box to include leads in the reassignment process.

(Optional) The process provides the ability to filter leads for reassignment by one or both of these filter options:

- Lead status: All lead statuses (except for closed statuses) are supported and are selected by default, which means that all leads in those statuses are subject to reassignment.
- Date type: You can specify date ranges in which leads that were created or last modified are subject for reassignment.

If the Leads check box is deselected, the Lead Options section is collapsed and its options become read-only.

Opportunities and **Opportunity Options**

Select the check box to include opportunities in the reassignment process.

(Optional) The process provides the ability to filter opportunities for reassignment by one or both of these filter options:

- Opportunity Status: You can select to reassign open and inactive opportunities.
- Date Type: You can specify date ranges in which opportunities that were created, last modified, or estimated to be closed are subject for reassignment.

If the Opportunities check box is deselected, the Opportunity Options section is collapsed and its options become read-only.

Select Current Reps

Tree Name

Displays the default tree associated with the sales user. If you have access to only one tree, you cannot change this tree. If you have access to multiple trees, you can select a tree using this field.

A sales user cannot make reassignments from one tree to another—only from one territory to another on the same tree.

Territory

Enter a territory from where to reassign leads, opportunities, and accounts—sales objects that are enabled in the Defined Search Criteria section.

Territory is optional as long as there is at least one selected sales representative. If a territory is not specified, all sales representatives in the tree that the user has access to can potentially be the *reassign-from* sales representatives. If a territory is specified, the system allows you to:

- Include in the reassignment process all leads, opportunities, and accounts (which are assigned to sales representatives who belong to the specified territory) that are resulted from the search criteria.

  Note: Accounts are indirectly associated with territories through sales representatives. In situations where the territory is the only information specified in the Select Current Reps section, the system uses the territory to determine the *reassign-from* sales representatives, and then displays the accounts of these people in the worksheet for account reassignment.

- Select the *reassign-from* sales representatives that belong to the selected territory.

You must have security access to the territory in order for sales representative in that territory to appear in the prompt.

Include All Reps in Territory (include all representatives in territory)

Select to include all leads, opportunities, and accounts that are assigned to sales representatives in the selected territory for reassignment.

When the Include All Reps in Territory option is selected, the system first searches for and selects all representatives in the specified territory. Then, it fetches all leads, opportunities, and accounts that are assigned to the representatives. In an example where *SF Bay Area* is the selected territory and *Terry Murphy* is the sales user, the system displays all accounts currently assigned to *Terry Murphy*, which can include the ones that are not linked to the *SF Bay Area* territory.

This field becomes editable if a territory is entered.

Current Rep (current representative)

Enter the names of sales representatives from whom to reassign leads, opportunities and accounts. You can enter sales representatives directly without specifying a territory. If a sales representative is entered, the Include All Reps in Territory field becomes unavailable for edit.

View Org (view organization)

Click to view the structure of the selected territory that shows where the corresponding representative is positioned in the hierarchy. This structure is informational only.

If the representative has no direct report, the link is not displayed.

Include Unassigned	Select to include in the reassignment process the leads, opportunities, and accounts that have not been assigned to any sales representative. This option can be selected in addition to the lead and opportunity reassignment options that are already set up.

A system message appears if not enough information is entered. You must at least specify a territory or a sales representative, or select the Include Unassigned field for the worksheet to be generated successfully.

Select New Reps

Territory

Enter a territory to where to reassign leads, opportunities and accounts—sales objects that are enabled in the Defined Search Criteria section.

Territory is optional, as long as there is at least one selected sales representative. If a territory is not specified, all sales representatives in the tree that the user has access to can potentially be the *reassign-to* sales representatives. If a territory is specified, you can:

- Select sales representatives that belong to the selected territory to be the new sales representatives.
- Leave the New Rep section blank.

  In this case, territory-only assignment takes place and the current sales representative assignment on leads and opportunities does not change.

In both cases, the selected territory is the default new territory. Or, you can enable the option to maintain the existing territory value of leads and opportunities after the reassignment process.

You need to have security access to the territory in order for sales representative in that territory to appear in the prompt.

New Rep (new representative)

Enter the names of sales representatives to whom to reassign leads, opportunities and accounts. You can enter sales representatives directly without specifying a territory.

If you select more than one sales representative, the system divides all sales activities evenly amongst the selected sales representatives. For example, if there are 10 leads to be reassigned and you specify two sales representatives in this section, the first five leads will be assigned to the first representative, and the remaining five leads to the second representative.

	Note: A territory-only assignment occurs if this section is blank. What it means is that the selected territory becomes the new territory as displayed on the worksheets for leads and opportunities, but the representative assignment remains unchanged. Territory-only assignment is not applicable to accounts; if the Account sales activity is subject to reassignment, the account reassignment worksheet will be empty.
View Org (view organization)	Click to view the structure of the selected territory that shows where the corresponding representative is positioned in the hierarchy. This structure is informational only. If the representative has no direct report, the link is not displayed.
Preserve Existing Territory	Select if you want the system to keep the existing territory of leads and opportunities in the reassignment process and not to use the selected territory or the territory to which the sales representative belongs. This field becomes editable if a sales representative is selected.

Review Worksheets

Review Worksheets	Click to access the reassignment worksheets for the reassign options that you selected. The worksheets list the details of current assignments for each lead, opportunity, or account and populate new assignment values based on your selection. Click the Next button on each worksheet to review the next available one and finally return to the Reassign Sales Activities page.

Submit Reassignments

Submit Reassignments	Click to submit all selected assignments. The system updates the leads and opportunities with the new sales representatives and their territories, and returns you to the Territory Reassignment page.

Reviewing Reassignment Worksheets

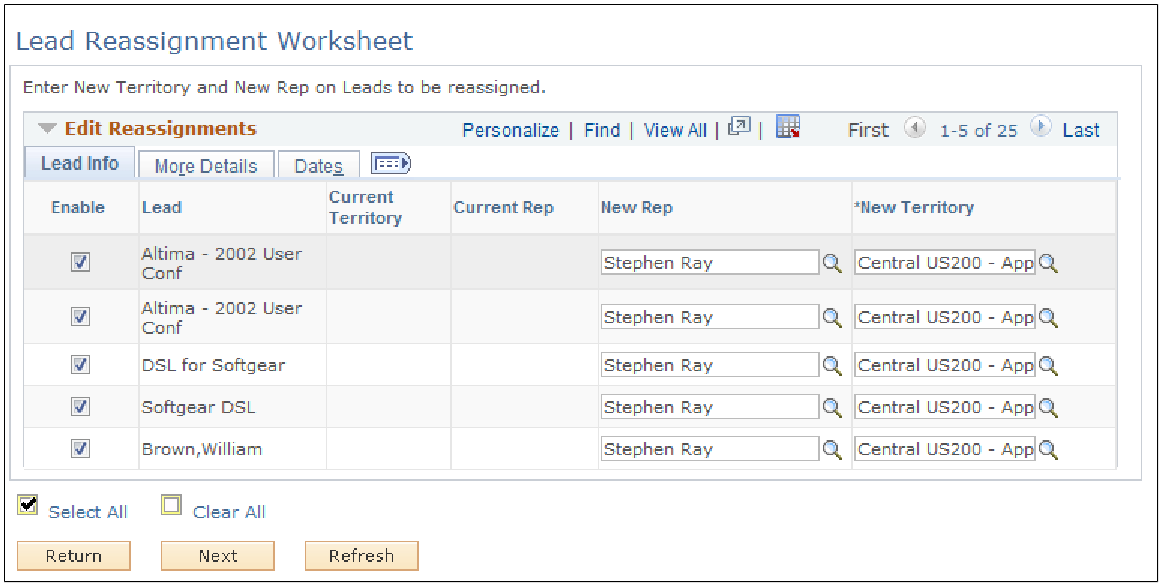
Use the Lead Reassignment Worksheet page (RSF_TR_REASS_LEAD) to

Navigation

Cick the Review Worksheets button on the Reassign Sales Activities page.

Image: Lead Reassignment Worksheet page

This example illustrates the fields and controls on the Lead Reassignment Worksheet page.



The system populates the new representatives (marked as *primary*) and new territory values based on the information gathered from the Select New Reps section on the Reassign Sales Activities page and you can override these values.

Important! For performance considerations, limit the number of each sales activity selected in its worksheet to 300 or less.

Opportunity Reassignment Worksheet Page

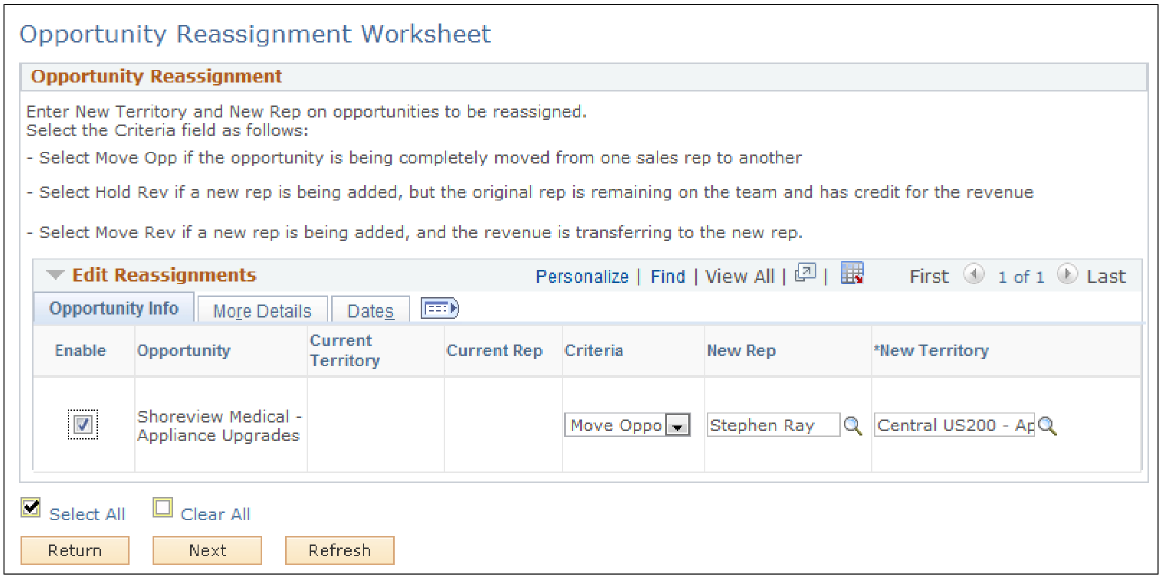
Use the Opportunity Reassignment Worksheet page ().

Navigation

Click the Next button on the Lead Reassignment Worksheet page.

Image: Opportunity Reassignment Worksheet page

This example illustrates the fields and controls on the Opportunity Reassignment Worksheet page.



Criteria

Select the way that you want to assign revenue for each opportunity. Values are:

Move Opportunity: Removes the current representative from the opportunity, which moves the entire opportunity—with revenue allocations—from the current representative to the new representative.

Hold Revenue: Adds the new sales representative to the opportunity but holds the revenue credit for the original sales representative.

Move Revenue: Preserves the current representative as a member of the opportunity sales team but adds the new sales representative as the primary representative for the opportunity. This action moves the revenue credit from the original sales representative to the new primary representative.

Account Reassignment Worksheet Page

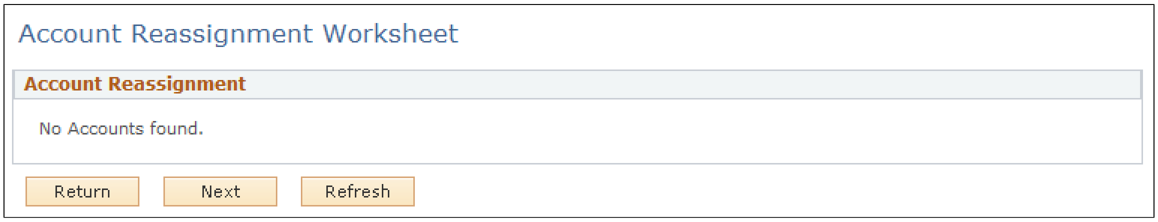
Use the Account Reassignment Worksheet page ().

Navigation

Click the Next button on the Opportunity Reassignment Worksheet page.

Image: Account Reassignment Worksheet page

This example illustrates the fields and controls on the Account Reassignment Worksheet page.



This page does not show any data when territory-only assignment occurs.

Chapter 14

Qualifying a Lead or Opportunity

Associating a Lead or Opportunity with a Source Campaign

This topic discusses how to:

- Associate a lead or opportunity with a source campaign.
- View a marketing activity summary.

Pages Used to Associate a Lead or Opportunity with a Source Campaign

Page Name	***Definition Name***	***Usage***
Lead - Qualify Page	RSF_LEAD_QUALIFY	Associate a lead with a source campaign.
Opportunity - Qualify Page	RSF_OPP_QUALIFY	Associate an opportunity with a source campaign.
Marketing Activity Summary Page	RA_ACT_SUMM	View a summary of the marketing campaign with which the lead or opportunity is associated. This link is available only if the lead contains marketing information.

Lead - Qualify Page

Use the Lead - Qualify page (RSF_LEAD_QUALIFY) to associate a lead with a source campaign.

Navigation

Sales > Search Leads > Lead - Qualify

Note: The Campaign section appears on the Qualify page in both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information here applies to both leads and opportunities.

Image: Lead - Qualify page (1 of 2)

This example illustrates the fields and controls on the Lead - Qualify page (1 of 2).

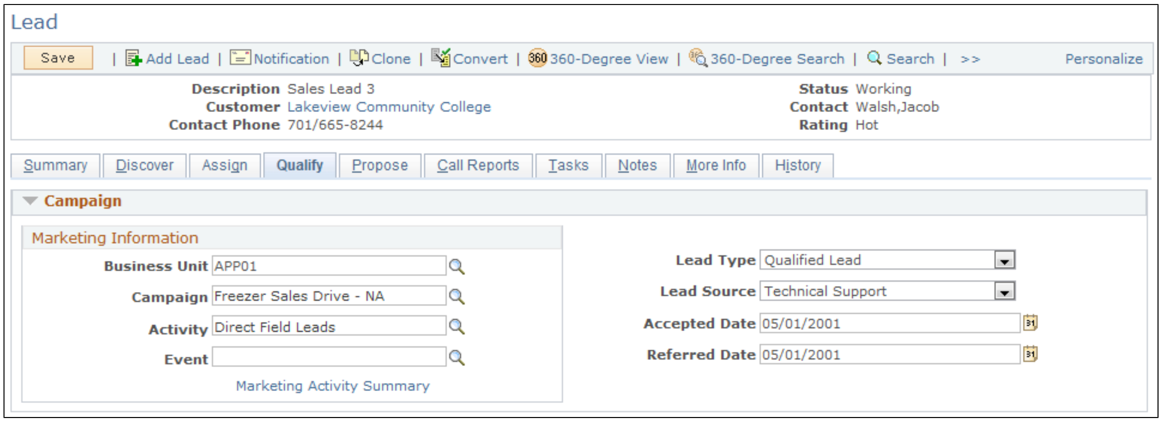
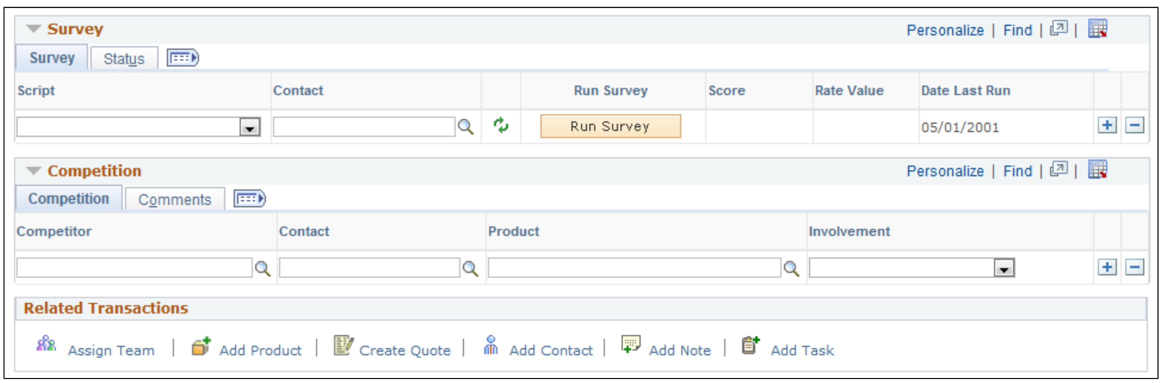


Image: Lead - Qualify page (2 of 2)

This example illustrates the fields and controls on the Lead - Qualify page (2 of 2).



If the lead or opportunity originates from a PeopleSoft Marketing campaign, the system populates the Lead Source field and displays information that is relevant—including the marketing business unit, campaign name, and wave name—to the campaign here. If the lead or opportunity does not originate from a campaign, these fields are blank. If a sales user creates the lead, the system enters the lead source of *Sales.*

You can override these values. If you enter a marketing business unit, campaign name, or wave name, you must also enter the other two items.

Note: If PeopleSoft FieldService and PeopleSoft Customer Relationship Management for High Technology are integrated with the system, the system generates sales leads for agreements that are expired (or about to expire) according to the user-defined time period. The system creates a sales lead with the source of *Agreement* for every agreement that is eligible for the process.

See "Generating Sales Leads for Agreement Renewal" (PeopleSoft CRM 9.2: Application Fundamentals).

Business Unit	Enter the business unit that incurs the cost of the campaign.

Campaign Name

Enter the campaign from which the lead or opportunity originated. When you specify a business unit, the system populates this field with the campaigns from that business unit.

Activity Name

Enter the activity from which the lead or opportunity originated. When you specify a campaign, the system populates this field with the activities from that campaign only.

Marketing Activity Summary

Click to access the Marketing Activity Summary page, where you can view a summary of the marketing campaign that generated the lead.

Lead Type

Select a type to indicate the nature of the lead. Possible values are *Inquiry, Lead, Qualified, Turnback Qualified,* and *Turnback.* These lead types are translate values that are delivered with the system. Except for *Qualified,* which is required to transfer leads from other PeopleSoft products, you can modify these or define additional values.

Lead Source

Select the source from which the lead originated. Possible values include *Sales*, *Marketing Campaign*, and *Online Marketing*. If a sales user creates the lead, the source is *Sales.*

Lead sources are predefined in the system. You can modify the descriptions on the Lead Source setup page. You can define additional values also, but do not delete the predefined ones. They are required for transferring leads between integrated system applications.

See Setting Up Lead Sources.

Note: When you clone a lead, the system sets the lead source to *Sales* for the new lead. However, the new lead continues to be tracked with the campaign and wave of the original lead.

Accepted Date

Enter the date when the sales representative accepted the lead.

When you change the lead status to *Accepted* on any page, the system changes the status here and sets the accepted date to the system's current date.

Referred Date

Enter the date when you received the prospect information (for example, from a trade show).

When you change the lead status to *Referred* on any page, the system changes the status here and sets the referred date to the system's current date.

Competition — Competition

Enter the competitor's name, the contact name, and the product, and select the involvement, which can be *Equal, Strong,* or *Weak.* Set up competitors in the Customers CRM menu.

To select a company as a competitor, you must set up the role type of *Competitor*, and set up companies and their contacts with a role type of *Competitor*.

See Setting Up Sales Competitors.

Competition — Comments

Select the Comments tab.

Enter notes to describe a competitor's pricing, product, or offering.

Marketing Activity Summary Page

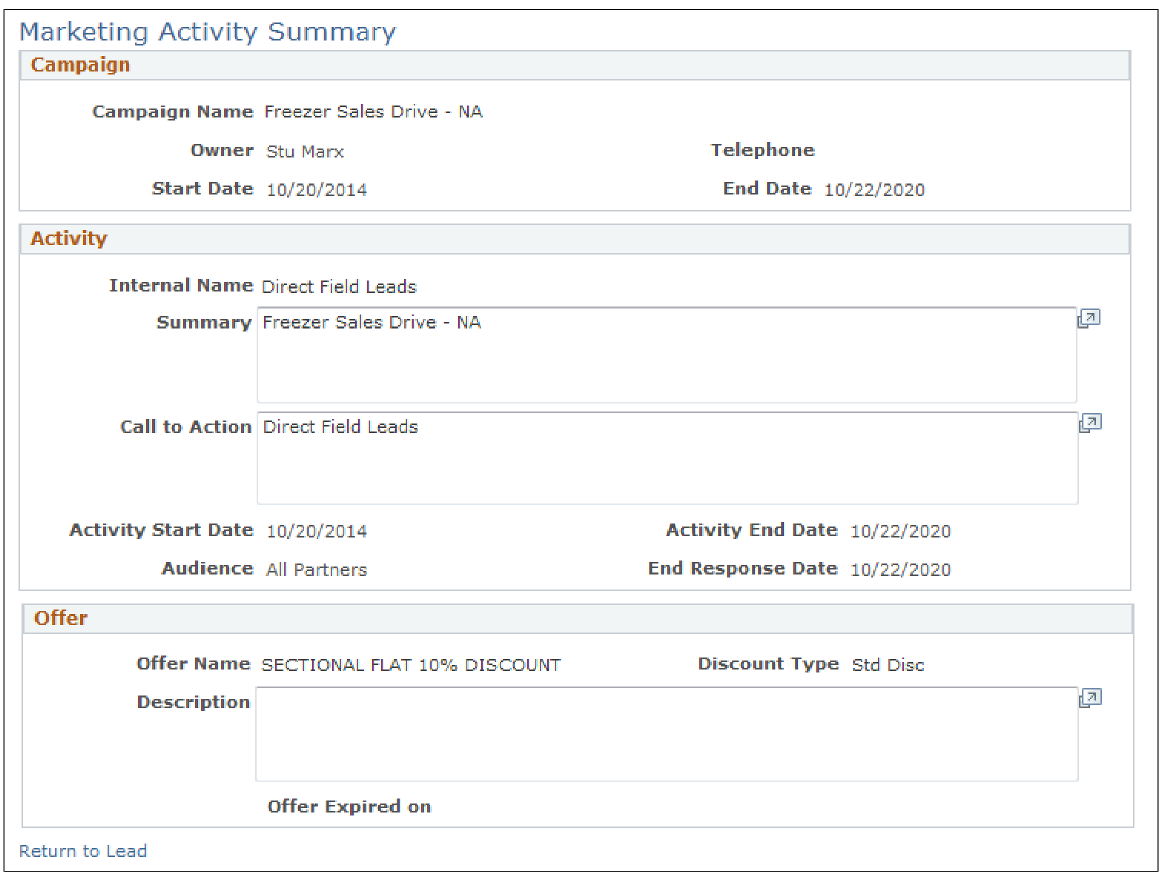
Use the Marketing Activity Summary page (RA_ACT_SUMM) to view a summary of the marketing campaign with which the lead or opportunity is associated.

Navigation

Click the Marketing Activity Summary link that appears in the Campaign section of the Lead - Qualify page or the Opportunity - Qualify page.

Image: Marketing Activity Summary page

This example illustrates the fields and controls on the Marketing Activity Summary page.



This page is read-only and displays information that you can use when deciding whether to accept the lead or not. You can click a link to view details of any promotional offers associated with the marketing campaign.

Running a Survey for a Lead or Opportunity

This topic discusses how to:

- Select a survey script.
- Administer a scripted survey.

Pages Used to Run a Survey for a Lead or Opportunity

Page Name	Definition Name	Usage
Lead - Qualify Page	RSF_LEAD_QUALIFY	Select the survey script for the lead.
Opportunity - Qualify Page	RSF_OPP_QUALIFY	Select the survey script for the opportunity.
Execute Script Page	RC_BS_EXECUTE_MAIN	Administer a scripted survey to identify the customer's interests and to qualify the lead or opportunity.
Add Script Comment Page	RC_BS_COMMENT	View comments, add script comments, or delete question comments.

Lead - Qualify Page

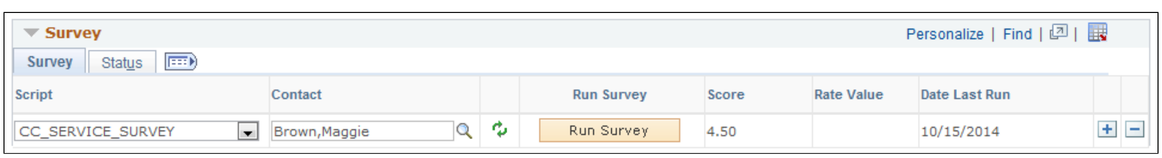
Use the Lead - Qualify page (RSF_LEAD_QUALIFY) to select the survey script for the lead.

Navigation

Sales > Search Leads > Lead - Qualify

Image: Lead - Qualify page: Survey tab

This example illustrates the fields and controls on the Lead - Qualify page: survey tab.



Note: The Qualify page appears in the both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information here applies to both leads and opportunities.

If the lead is transferred from PeopleSoft Marketing, where a survey is run, information that is relevant to that survey appears here. You can run additional surveys.

Script	Displays the list of scripted questions.
Contact	Displays the name of the contact who answers the questions.

	You can click Refresh to update the search list with the contacts for this lead and then select the appropriate contact from that list.
Run Survey	Click to access the Execute Script page, where the system leads you through scripted questions and assigns a score and rating to the prospect based on the contact's answers. **Note:** After you run a survey, you cannot delete it from this page. See Execute Script Page.
Score	Displays the score from the Execute Script page. As you enter a customer's answer to each scripted question, the system determines a score that is based on values set within that script. When you are finished administering the script, the system adds those scores and displays the total here. See Execute Script Page.
Rate Value	Displays the rate value from the Execute Script page. Rate values are based on the total script scores. Examples include *Cold, Warm, Hot, Satisfied, Somewhat Satisfied,* and *Very Satisfied.* If a rate value from the survey is not mapped to a lead rating, the user can interpret it and manually set the lead rating to the appropriate value. For example, you might map survey rate values to lead ratings such that only leads with a survey rating of either *Warm* or *Hot* are given a status of *Qualified.* When the survey rate value of a lead is *Very Satisfied,* the user can manually change the lead rating to *Hot* to change the status to *Qualified.*
Date Last Run	Displays the date when the script was last run.
Script Status	Displays the current status of the script with this contact. Values are *Completed, Processing,* and *Started.*

You can delete a script row before running the script. However, you cannot delete the script or its results after it has been submitted.

Execute Script Page

Use the Execute Script page (RC_BS_EXECUTE_MAIN) to administer a scripted survey to identify the customer's interests and to qualify the lead or opportunity.

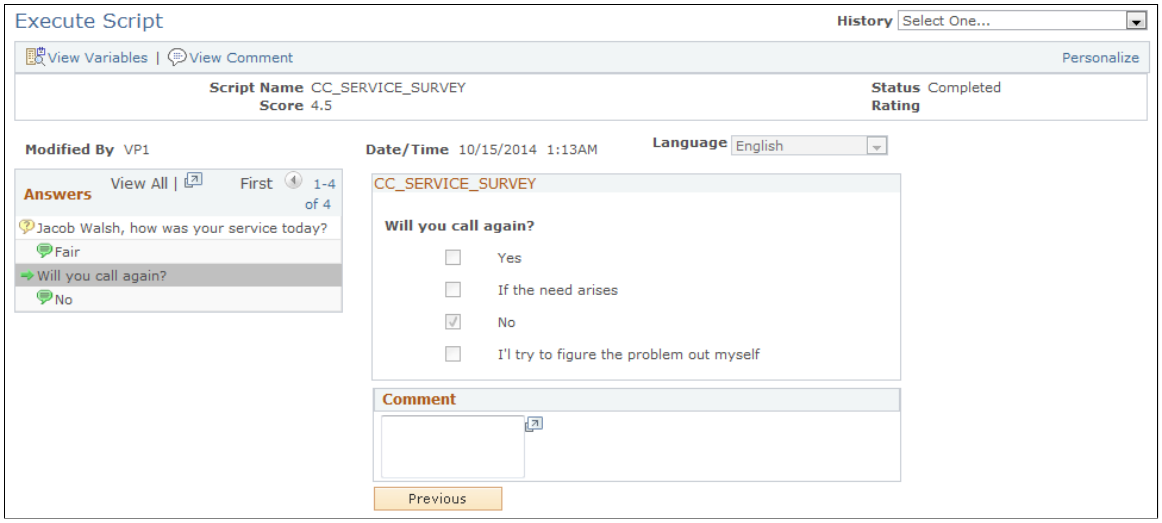
Navigation

Click the Run Survey button in the Survey section of the Lead - Qualify page or the Opportunity - Qualify page to run the selected script.

Note: The Execute Script page is part of both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information applies to both leads and opportunities.

Image: Execute Script page

This example illustrates the fields and controls on the Execute Script page.



Ask the scripted question, select the contact's response to the question, enter relevant comments, and then ask the next question. If the contact provides an answer that no longer promotes the sale of the product, the system displays a thank you message and ends the survey.

You can also enter and view script comments.

See "Understanding Script Types and Script Actions" (PeopleSoft CRM 9.2: Automation and Configuration Tools).

Chapter 15

Creating a Proposal for a Lead or Opportunity

Understanding Proposals for a Lead or Opportunity

After you have generated and qualified a lead or opportunity, you can create a proposal and send it to the potential customer. On the Propose page of the Lead component (RSF_LEAD_ENTRY) or the Opportunity component (RSF_OPPORTUNITY), you can add the specific products, quantities, and prices to include in the proposal. If you have licensed PeopleSoft Order Capture, you can create a quote that includes the information you entered on the Propose page. Then, you can put together a package of information to send to the potential customer. If the lead or opportunity becomes an actual sale and you have licensed Order Capture, you can create an order from the information entered on the Propose page.

See Sending Sales Proposals or Quotes to Customers.

Selecting Products and Prices for a Proposal

This topic discusses how to select products and prices for a proposal.

Pages Used to Select Products and Prices for a Proposal

Page Name	***Definition Name***	***Usage***
Lead - Propose Page	RSF_LEAD_PROPOSE	Select products and prices for a proposal for the lead.
Opportunity - Propose Page	RSF_OPP_PROPOSE	Select products and prices for a proposal for the opportunity.

Opportunity - Propose Page

Use the Opportunity - Propose page (RSF_OPP_PROPOSE) to select products and prices for a proposal for the opportunity.

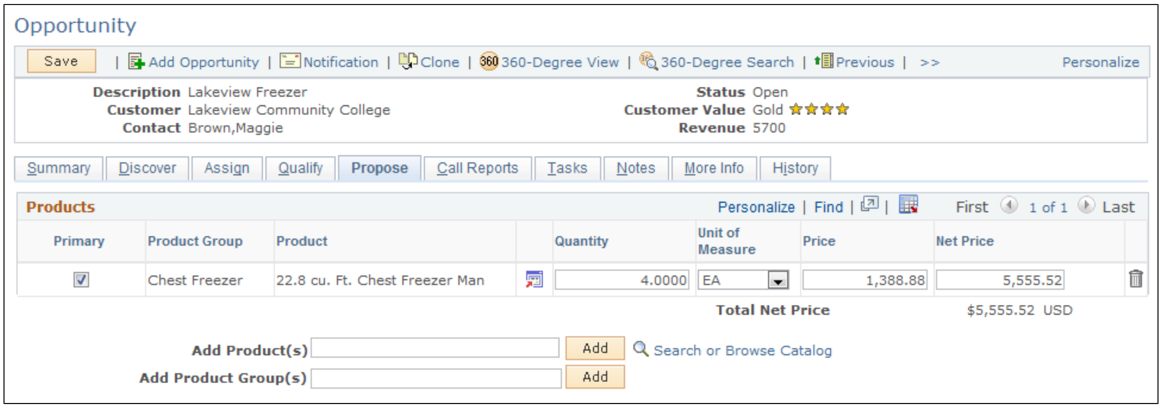
Navigation

Sales > Search Opportunities > Opportunity - Propose

Note: The Products section appears on the Propose page in both the Lead component and the Opportunity component. Although the following example shows the Opportunity component, the information applies to both leads and opportunities unless otherwise indicated.

Image: Opportunity - Propose page

This example illustrates the fields and controls on the Opportunity - Propose page.



Primary

Select to identify a product as the customer's primary interest.

Product Group

Displays the product group. If you add a product and a product group is associated with the product, the system populates this field.

Product

If you add a product using the Add Product(s) field and the Add button, this field displays the product that you added. If you add a product group using the Add Product Group(s) field and the Add button, this field is editable, and you can search for a product that is associated with the product group.

Price

Displays the price of each unit. Overriding the price here applies a price override only to the opportunity or lead.

When you enter a product, the system displays the product's unit of measure or default unit of measure. The system also displays the product's list price based on the combination of the product ID, currency code, and unit of measure. If you override the unit of measure and a price is calculated for the new unit that you enter, the system displays that price when you refresh the page. Price calculations or adjustments are performed by the PeopleSoft Enterprise Pricer.

Net Price

Displays the price multiplied by the quantity. When you press the Tab key to exit this field, the system calculates and displays the new subtotal.

Add Product(s) and **Add**

Enter a product and click the Add button to add the product to the list. You can also leave the text field blank and click the Add button to select a product from a list.

Add Product Group(s) and **Add**

Enter a product group and click the Add button to add the product group to the list. You can also leave the text field blank and click the Add button to select a product group from a list.

Search or Browse Catalog

Click to access the online catalog to locate the product and view product details in the product catalog.

Note: All sales users can browse the catalog and add products to opportunities; however, you cannot add a product to an order unless you have licensed PeopleSoft Order Capture.

Related Links

PeopleSoft Enterprise Pricer

PeopleSoft Product and Item Management

Generating Quotes and Orders

This topic discusses how to generate quotes and orders.

Pages Used to Generate Quotes and Orders

Page Name	*Definition Name*	*Usage*
Lead - Propose Page	RSF_LEAD_PROPOSE	Generate quotes and orders for a lead.
Opportunity - Propose Page	RSF_OPP_PROPOSE	Generate quotes and orders for an opportunity.

Lead - Propose Page

Use the Lead - Propose page (RSF_LEAD_PROPOSE) to generate quotes and orders for a lead.

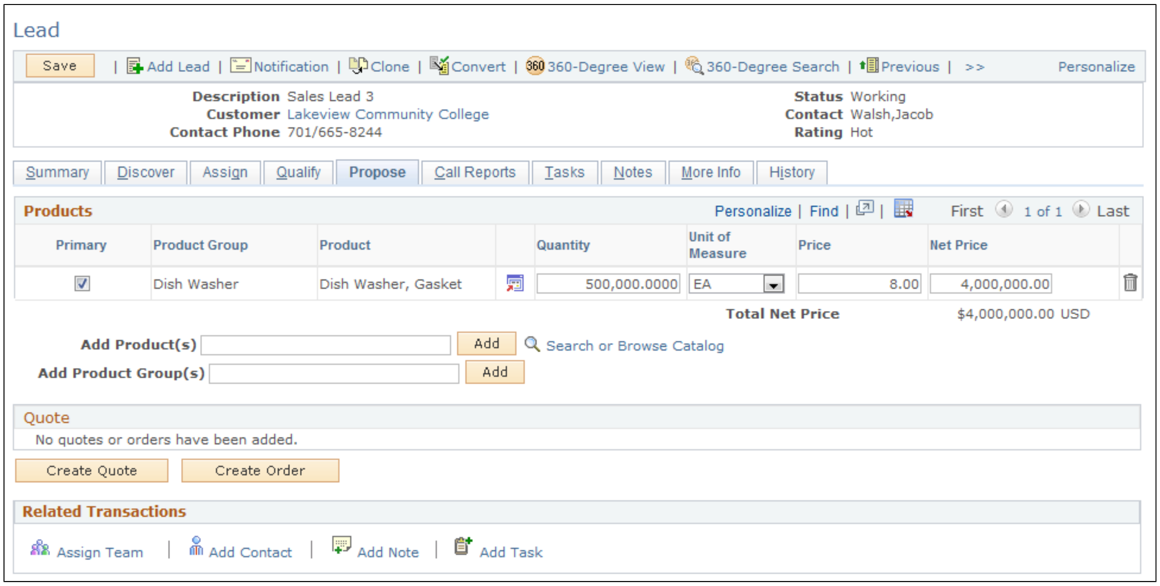
Navigation

Sales > Search Leads Click the Add Lead button on the Search Leads page, then click the Propose tab on the Lead page.

Note: The Quotes and Orders section appears on the Propose page in both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information applies to both leads and opportunities.

Image: Lead - Propose page

This example illustrates the fields and controls on the Lead - Propose page.



Create Quote and **Create Order**

Click to create a quote or order with the products displayed in the products grid. The system transfers the user to the Order Capture quote or order component.

If the lead or opportunity is associated with a marketing campaign and the product selected is in that campaign's marketing offer, the system copies the promotion code to the Order Capture pages for that product.

These buttons are available only if you are licensed and integrated with PeopleSoft Order Capture.

Note: You must designate a third-party tax vendor on the Order Capture Business Unit Definition page for taxes to be calculated as part of the quote or order. If you don't specify a tax vendor, no tax calculations are included.

See "Defining Order Capture Business Units" (PeopleSoft CRM 9.2: Order Capture Applications).

Quote and Order History

This tab shows the status, total price, and expiration date of the requests for quotes and orders that are submitted from the Products section of the Propose page.

Click the View Quote Details button to access the Quote component to review or edit this quote's details.

Click the Create Sales Order button to create a sales order from a quote. You can use this button only if the expiration date for the quote is later than the current date.

Click the Print button to access the Correspondence Request page, where you can compose and send an email message containing a quote for a customer.

See Sending Sales Proposals or Quotes to Customers.

Order Information

Select the Order Information tab.

View the order ID and quote ID.

Audit Information

Select the Audit Information tab.

Review this information to determine who created or modified quotes and orders and to see when the changes occurred.

Related Transactions

Use this toolbar to quickly access other pages that update information for the lead.

Chapter 16

Creating Sales Tasks and Adding Notes for a Lead or Opportunity

Understanding Sales Tasks

A task is any day-to-day activity, such as a meeting or a conference call, that you add to your calendar. You use tasks in many PeopleSoft Customer Relationship Management (PeopleSoft CRM) applications.

See "Understanding Task Management" (PeopleSoft CRM 9.2: Application Fundamentals).

A sales task is any day-to-day activity associated with managing a lead or an opportunity. Sales tasks might include making sales calls, attending meetings, or following up on prospects. You can use functionality in the Lead component (RSF_LEAD_ENTRY) and the Opportunity component (RSF_OPPORTUNITY) to manage sales tasks.

Creating and Assigning Sales Tasks

This topic discusses how to create and assign sales tasks.

Pages Used to Create and Assign Sales Tasks

Page Name	***Definition Name***	***Usage***
Lead - Tasks Page	RB_TSK_EDIT_GRID	Create and track sales tasks to follow up on a lead, close a sale, or convert a lead to an opportunity.
Opportunity - Tasks Page	RB_TSK_EDIT_GRID	Create and track sales tasks that are needed to follow up on an opportunity and close the sale.

Lead - Tasks Page

Use the Lead - Tasks page (RB_TSK_EDIT_GRID) to create and track sales tasks to follow up on a lead, close a sale, or convert a lead to an opportunity.

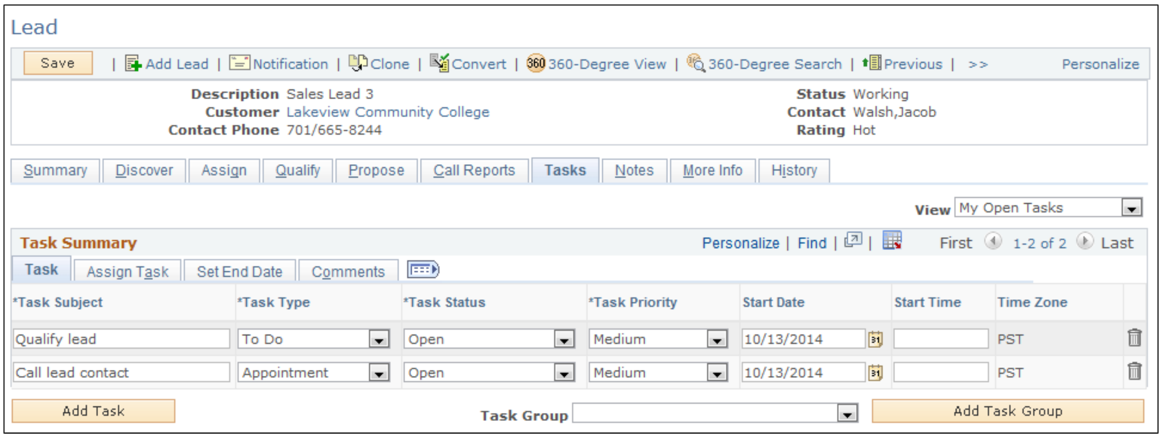
Navigation

Sales > Search Leads > Lead - Tasks

Note: The Tasks page appears in both the Lead component and the Opportunity component. While the following example shows the Lead component, the information applies to both leads and opportunities unless otherwise indicated.

Image: Lead - Tasks page: Task tab

This example illustrates the fields and controls on the Lead - Tasks page: Task tab.



Use this page to identify each task that is required to manage the lead or opportunity and close the sale. When a new task is added and saved, the system automatically saves the task to the calendar of the task owner and to the task list.

Sales tasks can be added using one of these methods:

- Click the Add Task button to add tasks one by one manually.
- Select a template from the Task Group field and click the Add Task Group button to add a set of predefined tasks manually.
- Use the Active Analytics Framework (AAF) to populate a set of predefined tasks automatically. AAF policies are delivered to add preset sales tasks to leads and opportunities when the lead status is changed to *open* or *rejected*, or when the opportunity sales stage is changed to *discover*, *qualify,* or *solution*.

Tasks are not available for edit if you are not the task owner.

Note: When an opportunity is closed, the entire component becomes read-only except for the Task Summary section, where tasks can still be added or updated.

View	Filter the tasks that appear in the Task Summary list. Values are *All My Tasks, My Closed Tasks,* and *My Open Tasks* (default value).
Add Task	Click to add a new sales task.
Task Group and **Add Task Group**	Select a task group. For leads, only the task groups that are associated with the *Lead* application usage are available for selection. The same is true for opportunities, where you can select only from Opportunity-specific task groups.

Click the Add Task Group button to populate the Task Summary section with a set of predefined tasks that are associated with the selected task group.

The system allows duplicate tasks to appear in the Task Summary section.

Task

Click the Task Details button to access the Task Details page and enter or view detailed information about the task. This button appears after the page is saved.

Task Subject Enter a description of the task.

Task Type Select a task type. Set up task types on the Tasks Type page under Common Definitions, Task Management.

Task Status Select the task status. Values are *Cancelled, Completed, In Process,* and *Open.*

Task Priority Select the task priority. Values are *High, Medium,* and *Low.*

Start Date Enter a start date for the task.

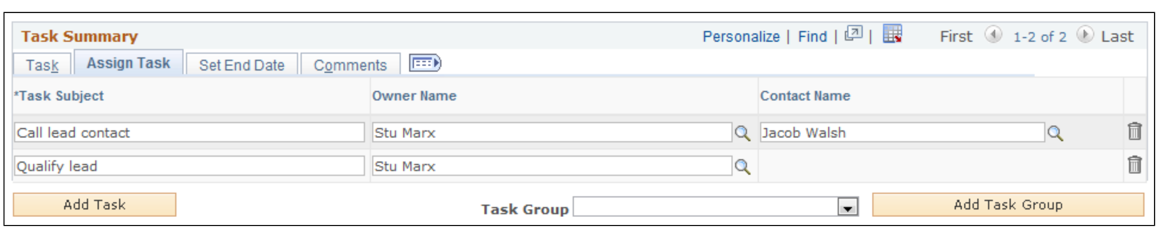
Start Time Enter a start time for the task.

Assign Task

Select the Assign Task tab.

Image: Lead - Tasks page: Assign Task tab

This example illustrates the fields and controls on the Lead - Tasks page: Assign Task tab.



Task Subject Enter a description of the task.

Owner Name Enter the user to whom the task is assigned.

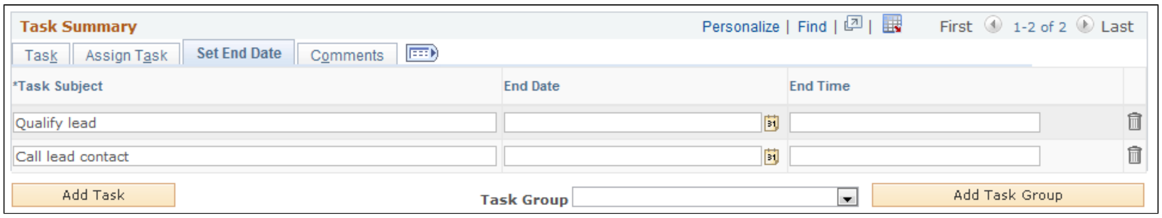
Contact Name Enter the name of the contact person for the task.

Set End Date

Select the: Set End Date tab.

Image: Lead - Tasks page: Set End Date tab

This example illustrates the fields and controls on the Lead - Tasks page: Set End Date tab.



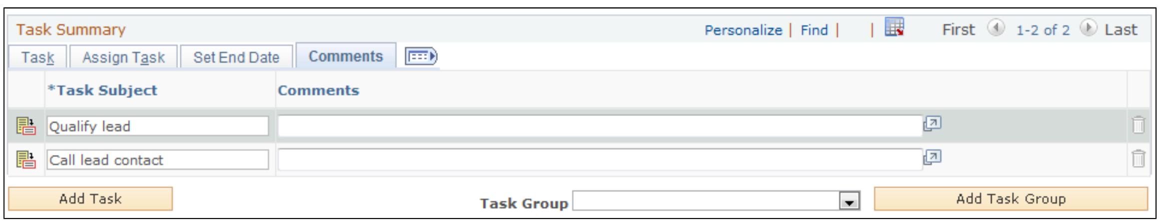
End Date and **End Time** Enter the date and time when you expect to complete the task.

Comments

Select the Comments tab.

Image: Lead - Tasks page: Comments tab

This example illustrates the fields and controls on the Lead - Tasks page: Comments tab.



Enter comments describing the task.

Related Links

Setting Up Task Group Templates for Leads and Opportunities

Managing and Viewing Tasks

This section provides an overview of different ways to access tasks and discusses how to:

- Manage and view tasks.
- Associate a task with a lead or opportunity.

Pages Used to Manage and View Tasks

Page Name	***Definition Name***	***Usage***
Task Details Page	RB_TSK	View task details.
Task Details - Related Objects for the Task Page	RB_TSK_TXNS	Associate a task with a lead or opportunity.
My Tasks Page	RB_TSK_MY_TASKS	Manage and view tasks.

Page Name	Definition Name	Usage
Monthly Calendar Page	RB_TSK_CALENDAR	View tasks in calendar format.

Task Details Page

Use the Task Details page (RB_TSK) to view task details.

Navigation

- Click the Task Detail button on the Lead - Tasks page next to the task that you want to view or edit.
- Click the Task Detail button on the Opportunity - Tasks page next to the task that you want to view or edit.
- My Calendar

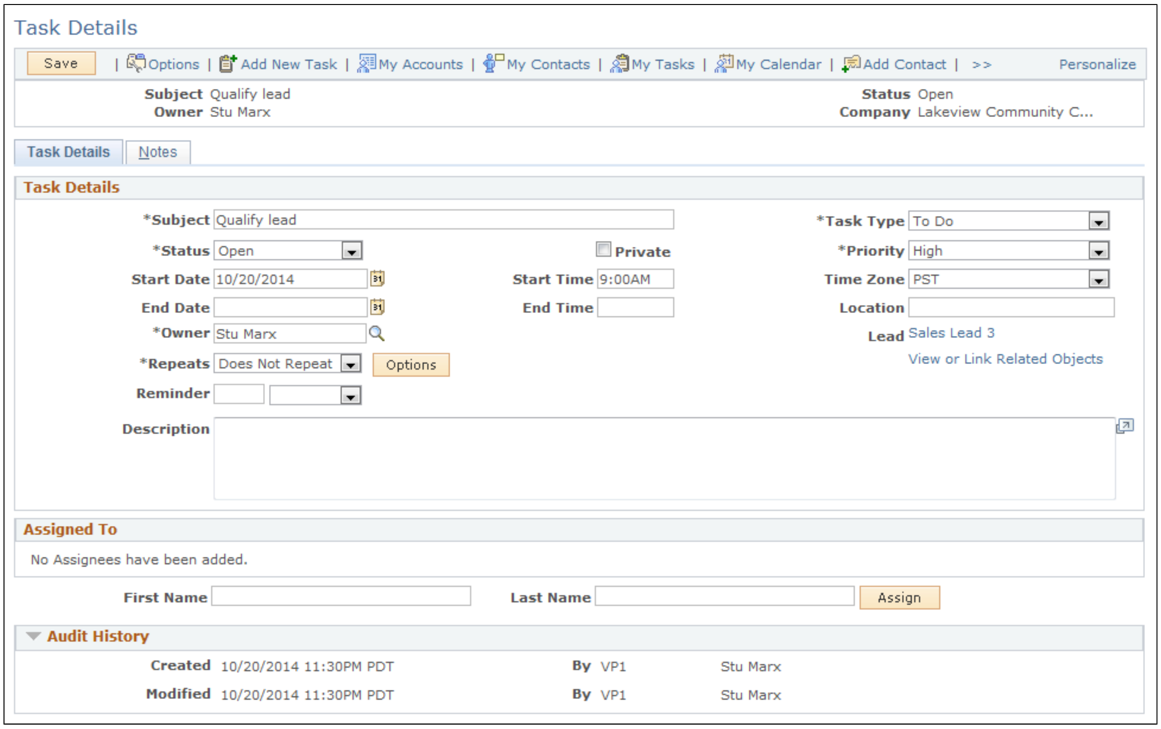
  Click the Add Calendar Entry toolbar button in the My Calendar component.

  See "Understanding Calendars" (PeopleSoft CRM 9.2: Application Fundamentals).
- Click the Add Task toolbar button on the My Tasks page.

Note: When you enter and save a task on the Lead - Tasks page or the Opportunities - Tasks page, the system associates the task with a lead or opportunity and writes that task to the calendar (if applicable for the selected task type). However, when you enter a task directly into the My Calendar component or the My Tasks component, the system does not associate it with a lead or opportunity. You must click the View or Link Transactions link on the Task Details page to associate the task with a lead or opportunity.

Image: Task Details page

This example illustrates the fields and controls on the Task Details page.



Referral The systems displays a link to the lead or opportunity with which the task is associated. Click the link to view the lead or opportunity.

View or Link Related Objects Click this link to access the Task Details - Related Objects for the Task page, where you can associate the task with a lead or opportunity.

Task Details - Related Objects for the Task Page

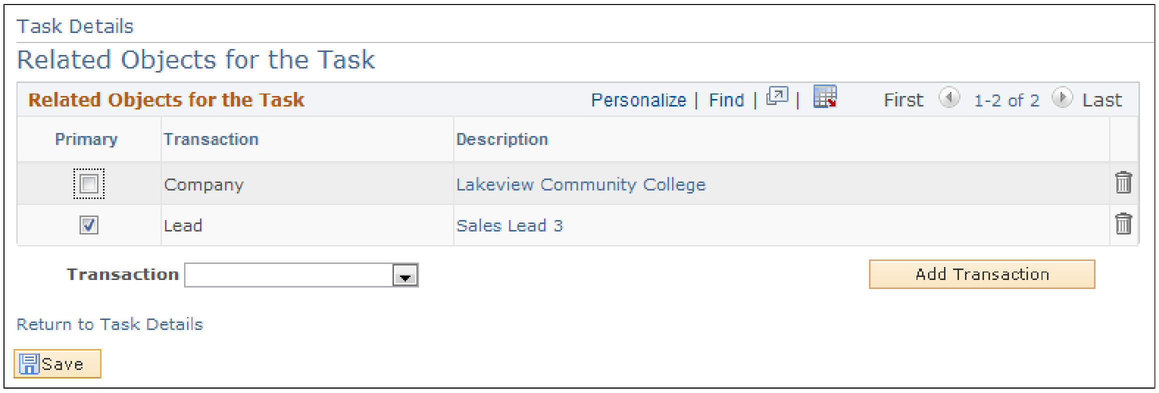
Use the Task Details - Related Objects for the Task page (RB_TSK_TXNS) to associate a task with a lead or opportunity.

Navigation

Click the View or Link Related Objects link on the Task Details page.

Image: Task Details - Related Objects for the Task page

This example illustrates the fields and controls on the Task Details - Related Objects for the Task page.



Primary

Select this check box to indicate the primary transaction to which the task belongs. A task can be associated with multiple transactions. In that case, one transaction must be designated as the primary transaction for the task.

Transaction

Select *Company*, *Lead*, *Opportunity* to link to the associated task.

Company, Lead, or **Opportunity**

The system displays one of these fields after you make a selection in the Transaction field. Select a company, lead, or opportunity with which the task is associated.

Add Transaction

Click this button to associate the task with the related object that you selected.

Adding Notes and Attachments

This topic discusses how to enter and view notes and attachments.

Pages Used to Add Notes and Attachments

Page Name	***Definition Name***	***Usage***
Lead - Notes Page	RSF_LEAD_NOTES	Enter notes and attachments related to the lead.
Opportunity - Notes Opportunity - Notes Page	RSF_OPP_NOTES	Enter notes and attachments related to the opportunity.

Opportunity - Notes Page

Use the Opportunity - Notes page (RSF_OPP_NOTES) to enter notes and attachments related to the opportunity.

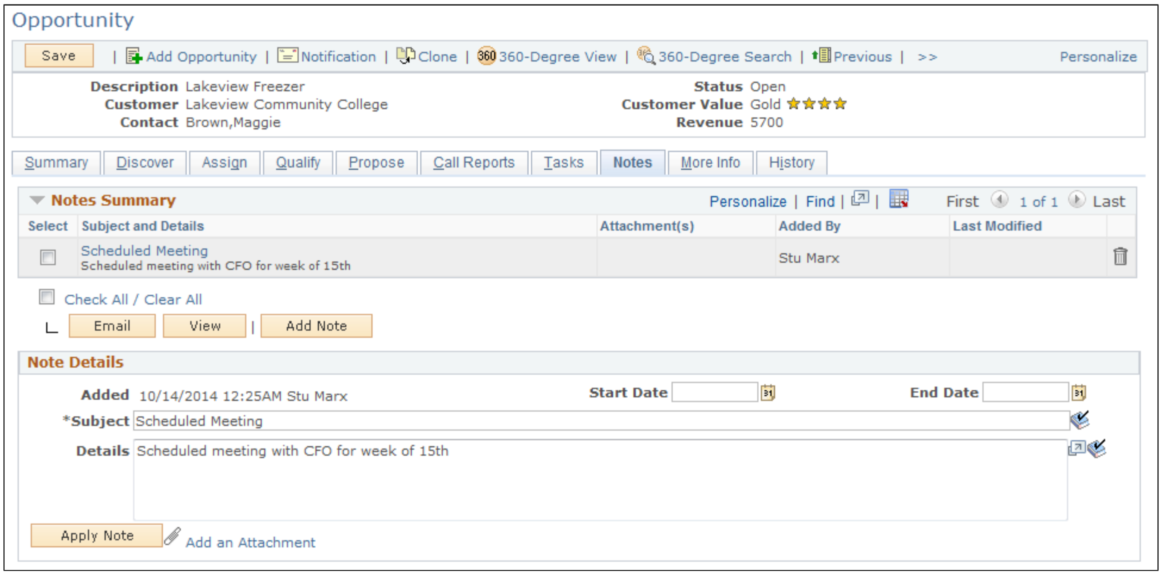
Navigation

Sales > Search Opportunities > Opportunity - Notes

Note: The Notes page appears in both the Lead component and the Opportunity component. Although the following example shows the Opportunity component, the information applies to both leads and opportunities.

Image: Opportunity - Notes page

This example illustrates the fields and controls on the Opportunity - Notes page.



Select	Select this check box to indicate that you want to send the note to the customer by email or to view the entire note.
Subject and Details	Click to display the Note Details section at the bottom of the page.
Email	Click this button to access the Outbound Email page, where you can send an email message with notes and attachments to the customer.
View	Click to view the entire note.
Add Note	Click to display the Add a Note section at the bottom of the page.
Apply Note	Click to add the note to the Notes Summary section of the page.
Add an Attachment	Click this link to add an attachment to the lead or opportunity.

See "Understanding Notes and Attachments" (PeopleSoft CRM 9.2: Application Fundamentals).

Chapter 17

Managing Leads and Opportunities

Searching for Leads and Opportunities

This topic discusses how to search for existing leads and opportunities.

Pages Used to Search for Leads and Opportunities

Page Name	***Definition Name***	***Usage***
Search Leads Page	RSF_LEADS_HOME_GRD	Search for leads.
Search Opportunities Page	RSF_OPP_HOMEPAGE	Search for opportunities.

Search Leads Page

Use the Search Leads page (RSF_LEADS_HOME_GRD) to search for leads.

Navigation

Sales > Search Leads > Search Leads

Note: The search pages for leads and opportunities are similar. Although the following example shows the Lead component, the information applies to both leads and opportunities.

Image: Search Leads page (1 of 2)

This example illustrates the fields and controls on the Search Leads page (1 of 2).

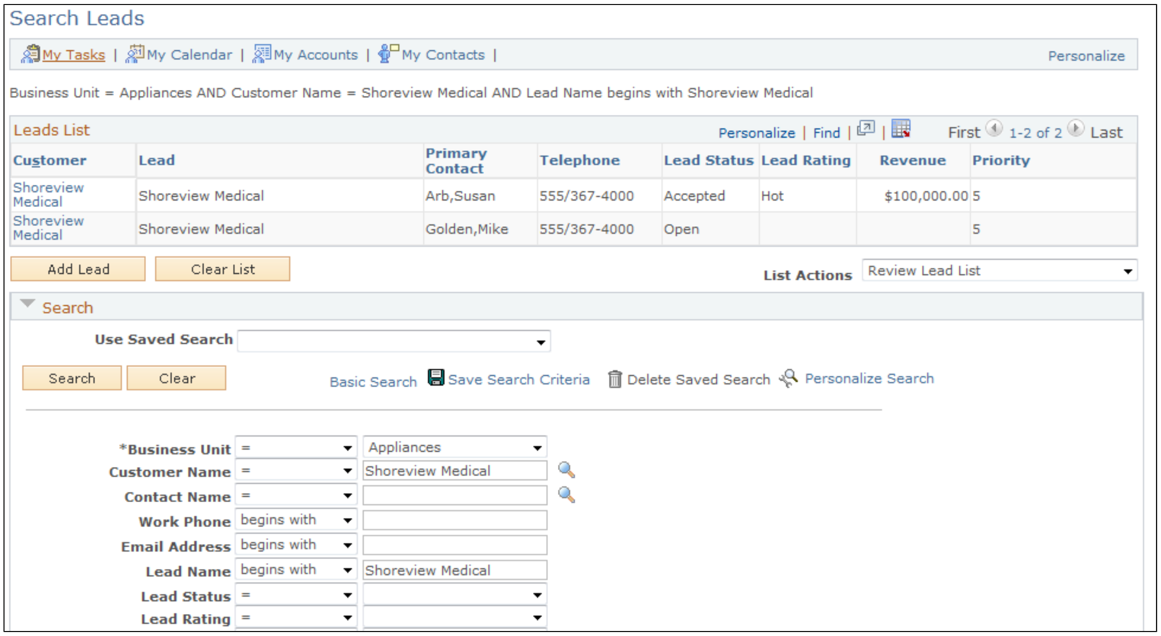
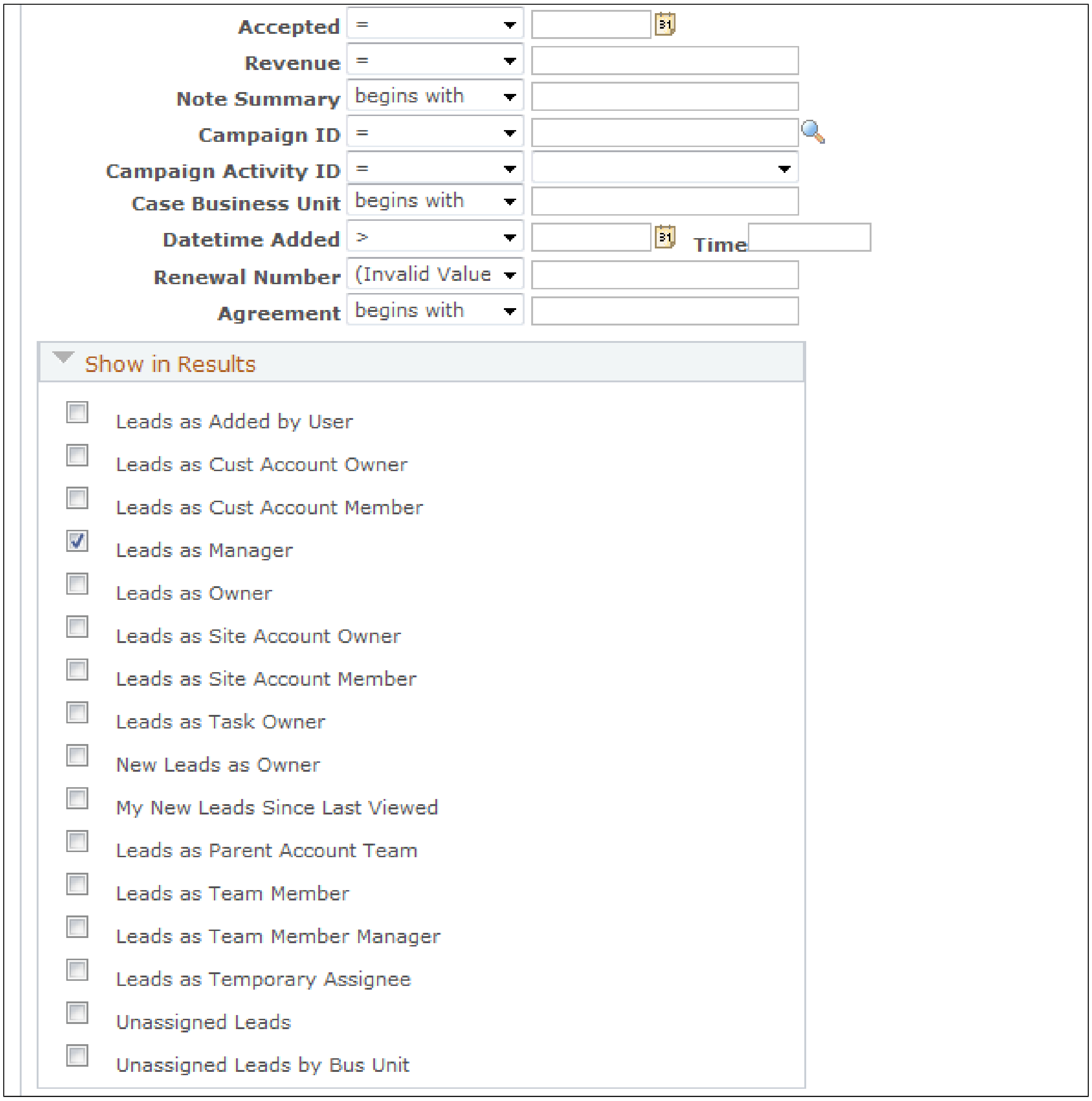


Image: Search Leads page (2 of 2)

This example illustrates the fields and controls on the Search Leads page (2 of 2).



Prospects as well as Customer Data Model (CDM) customers are listed in the search results.

Important! The fields that appear in the results grid are determined by the list action that you select and not by the configurable search pages.

List Actions	Select an action that you will perform using the list. The fields that appear in the list change to reflect the action you select. For example, you can change priorities, change the sales representative assignment, and reject or accept leads on the search page.

Show in Results

Select the following check boxes to specify the leads or opportunities that appear when you perform a search.

Note: The search fields that are available in the Search section and the check boxes that are available in the Show in Results section depend on how you configure the search pages for leads and opportunities.

See "Configuring Options for Runtime Search Pages" (PeopleSoft CRM 9.2: Automation and Configuration Tools).

Leads as Added by User	Select to display leads that you added.
Leads as Cust Account Owner (leads as customer account owner)	Select to display leads for customers whose accounts you own.
Leads as Cust Account Member (leads as customer account member)	Select to display leads for customers on whose accounts you are a team member.
Leads as Manager	Select to display leads that are assigned to a sales representative that you manage. The territory tree determines the sales representatives that you manage.
Leads as Owner	Select to display leads for which you are the primary sales representative.
Leads as Site Account Owner	Select to display leads that are for a site for which you are the account owner.
Leads as Site Account Member	Select to display leads that are for a site for which you are an account member.
Leads as Task Owner	Select to display leads that have a task that is assigned to you.
New Leads as Owner	Select to display new leads for which you are the primary sales representative.
My New Leads Since Last Viewed	Select to display new leads that have been added since the last time you viewed the search page.
Leads as Parent Account Team	Select to display leads for specific customers for which you are a member of the parent account team.
Leads as Team Member	Select to display leads for which you are a team member.
Leads as Team Member Manager	Select to display leads for which you are the team member manager.
Unassigned Leads	Select to display unassigned leads.
Unassigned Leads by Bus Unit (unassigned leads by business unit)	Select to display unassigned leads sorted by business unit.

Managing Leads and Opportunities on the Search Page

This topic discusses how to:

- Prioritize leads and opportunities.
- Change the sales representative assignment.
- Reject or accept leads.
- Update the forecast for opportunities.
- Update the sales stage for opportunities.

Note: The search pages for leads and opportunities are similar. Although the following example shows the Lead component, the information applies to both leads and opportunities.

Pages Used to Manage Leads and Opportunities

Page Name	***Definition Name***	***Usage***
Search Leads Page	RSF_LEADS_HOME_GRD	Manage leads.
Search Opportunities Page	RSF_OPP_HOMEPAGE	Manage opportunities.

Search Leads Page

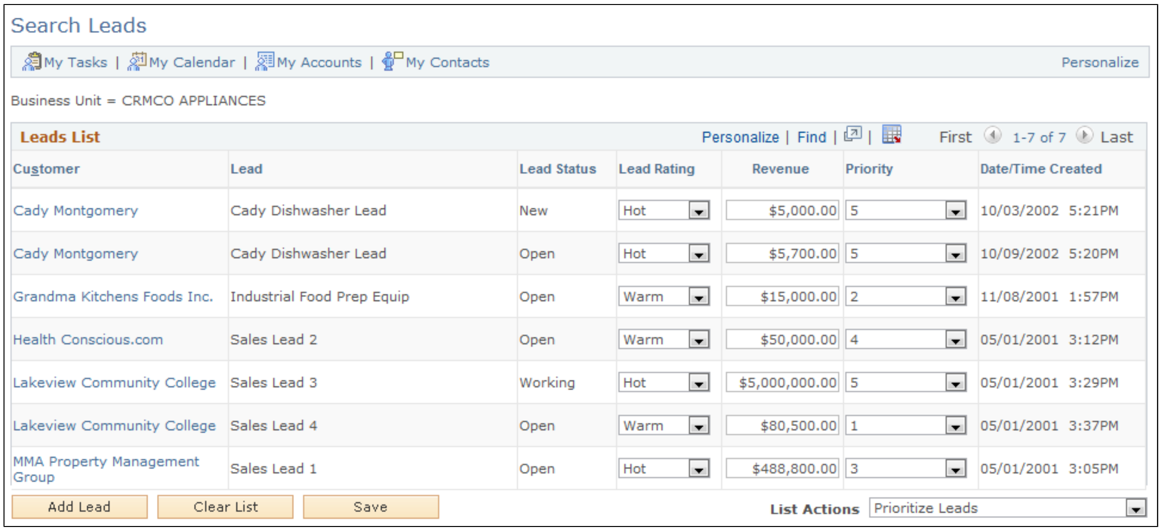
Use the Search Leads page (RSF_LEADS_HOME_GRD) to manage leads.

Navigation

Sales > Search Leads > Search Leads

Image: Search Leads page (prioritize leads action)

This example illustrates the fields and controls on the Search Leads page (prioritize leads action).



To prioritize leads and opportunities on the search page, select *Prioritize Leads* in the List Actions field.

Lead Rating

Indicates the degree—*Hot, Warm,* or *Cold*—of the customer's interest or the potential for making a sale.

Define rating values on the Lead Ratings page.

See Setting Up Lead Ratings.

Revenue

Enter the revenue for the lead.

Priority

Select a priority to indicate the urgency of handling this opportunity. Priority values are translate values.

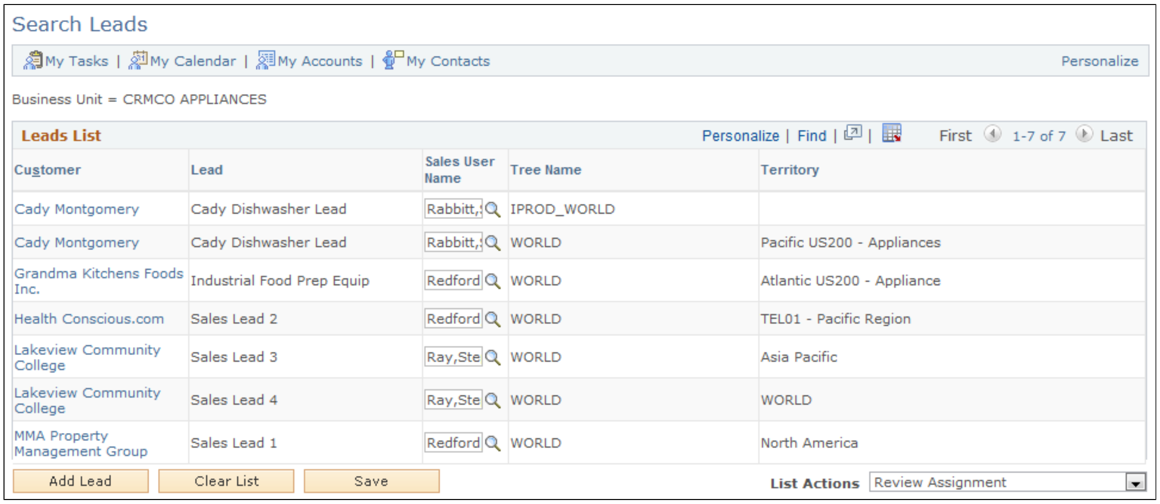
Note: If the lead has been converted to an opportunity, you cannot change the rating, revenue, or priority for the lead.

Changing the Sales Representative Assignment

Access the Search Leads (Sales, Search Leads, Search Leads) page or the Search Opportunities (Sales, Search Opportunities, Search Opportunities) page.

Image: Search Leads page (review assignment action)

This example illustrates the fields and controls on the Search Leads page (review assignment action).



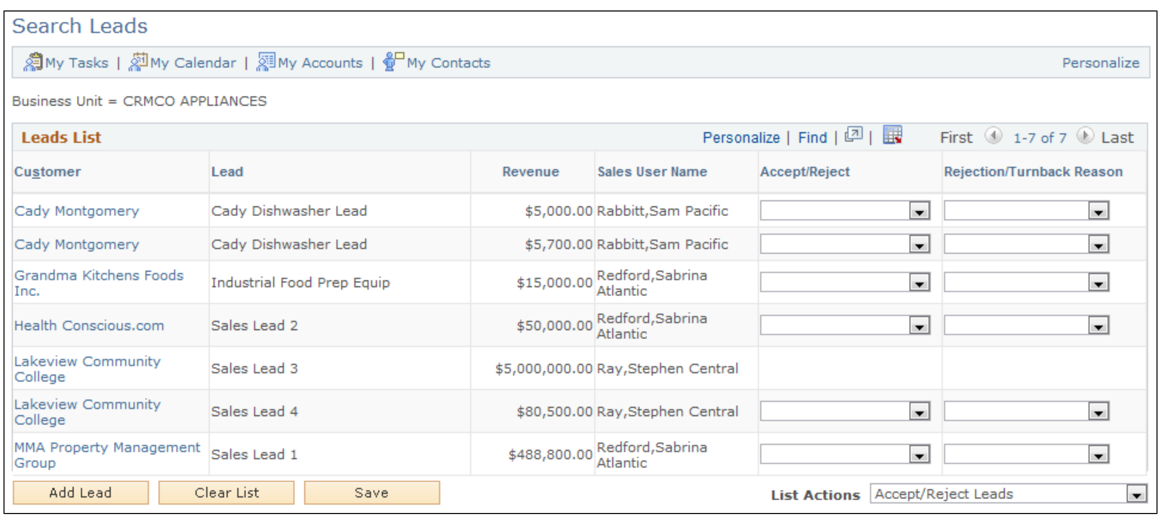
To change the assignment of sales representatives on the search page, select *Review Assignment* in the List Actions field. Select a different person in the Sales User field as the new sales representative of the corresponding lead or opportunity.

Rejecting or Accepting Leads

Access the Search Leads page (Sales, Search Leads, Search Leads).

Image: Search Leads page (accept/reject leads action)

This example illustrates the fields and controls on the Search Leads page (accept/reject leads action).



To accept or reject leads as a sales representative, select *Accept/Reject Leads* in the List Actions field.

Accept/Reject	Select whether to accept the lead. Values are *Accepted, Rejected,* and *Turnback*.
Rejection/Turnback Reason	Select a reason for rejecting or turning back the lead.

Search Opportunities Page

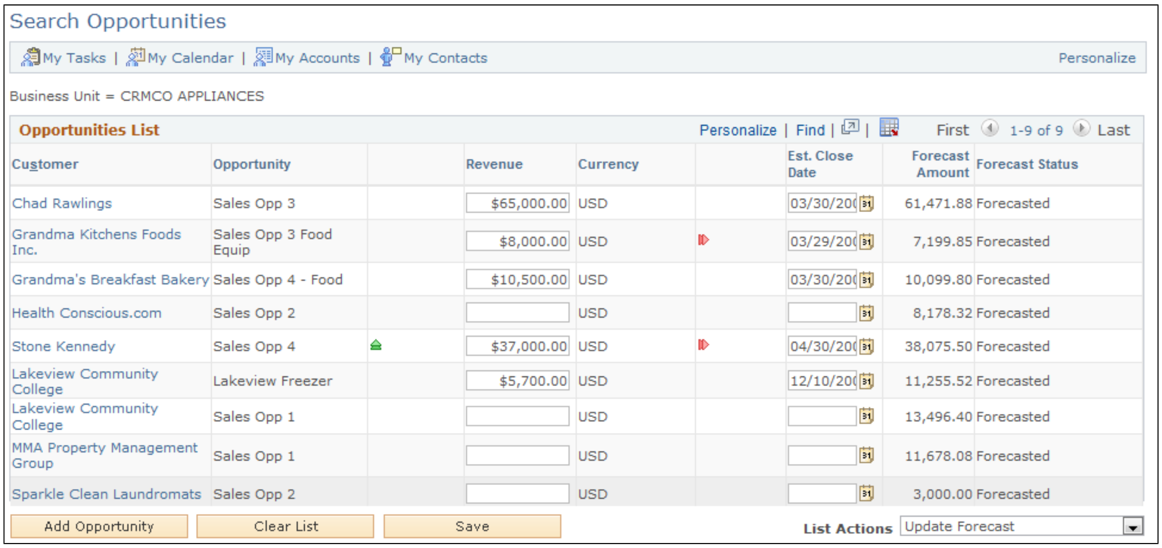
Use the Search Opportunities page (RSF_OPP_HOMEPAGE) to manage opportunities.

Navigation

Sales > Search Opportunities > Search Opportunities

Image: Search Opportunities page (update forecast action)

This example illustrates the fields and controls on the Search Opportunities page (update forecast action).



To update forecast information for opportunities, select *Update Forecast* in the List Actions field.

Revenue

Enter the amount of revenue that is anticipated from the sale.

The system displays arrows in the column to the left of the Revenue column. An upward-pointing green arrow signifies that the revenue has increased, and a downward-pointing red arrow signifies that the revenue has decreased.

Est. Close Date (estimated close date)

Enter a date that the system uses to determine whether to include the opportunity in the pipeline or forecast based on the time period that is specified for that pipeline or forecast.

The system displays arrows in the column to the left of the Est. Close Date column. A right-pointing green arrow signifies that the estimated close date has changed to an earlier date, and a left-pointing red arrow signifies that the estimated close date has changed to a later date.

Forecast Amount

If you have created a forecast for the opportunity, the system displays the forecast amount.

To update sales stages for opportunities, select *Update Sales Stage* in the List Actions field.

Sales Stage

Select the current stage of the sales process for the opportunity. The system populates this drop-down list box with values that are based on the specified sales process.

Set up sales stages on the Sales Process page.

See Setting Up a Sales Process.

Managing a Lead or Opportunity by Using Summary Information

This section provides an overview of the Summary page in the Lead and Opportunity components and discusses how to manage a lead or opportunity on the Summary page.

Pages Used to Manage a Lead or Opportunity by Using Summary Information

Page Name	***Definition Name***	***Usage***
Lead - Summary Page or Opportunity - Summary Page	RSF_LEAD_SUMMARY	Manage a lead.
Lead - Summary Page or Opportunity - Summary Page	RSF_OPP_SUMMARY	Manage an opportunity.

Understanding the Summary Page in the Lead and Opportunity Components

The Summary page in the Lead component and the Opportunity component enables sales representatives and managers to view high-level information for a lead or opportunity. The Summary page displays the sales stage, forecast (for opportunities), contacts, call reports, products, competition, tasks, notes, sales team, and quotes. In addition, the page displays links that you can click to access a page with detailed information for the particular type of data that you want to access.

You can configure the Summary page to meet your particular needs.

See Setting Up the Summary Page for Leads and Opportunities.

Lead - Summary Page or Opportunity - Summary Page

Use the Lead - Summary page (RSF_LEAD_SUMMARY) to manage a lead.

Use the Opportunity - Summary page (RSF_OPP_SUMMARY) to manage an opportunity.

Navigation

- Sales > Search Leads > Lead - Summary
- Sales > Search Opportunities > Opportunity - Summary

Image: Opportunity - Summary page (1 of 2)

This example illustrates the fields and controls on the Opportunity - Summary page (1 of 2).

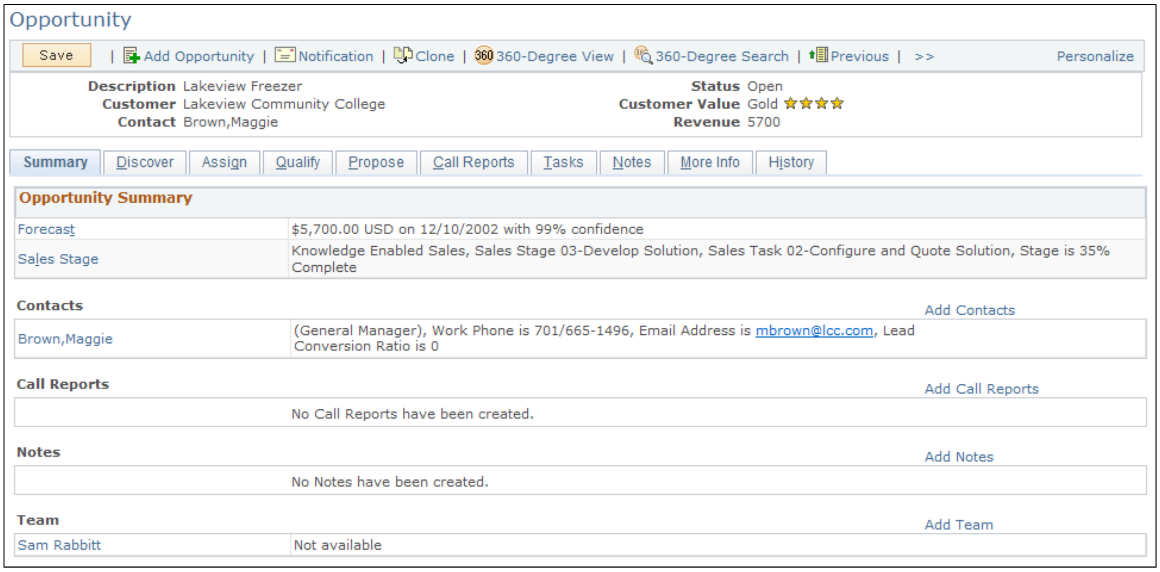
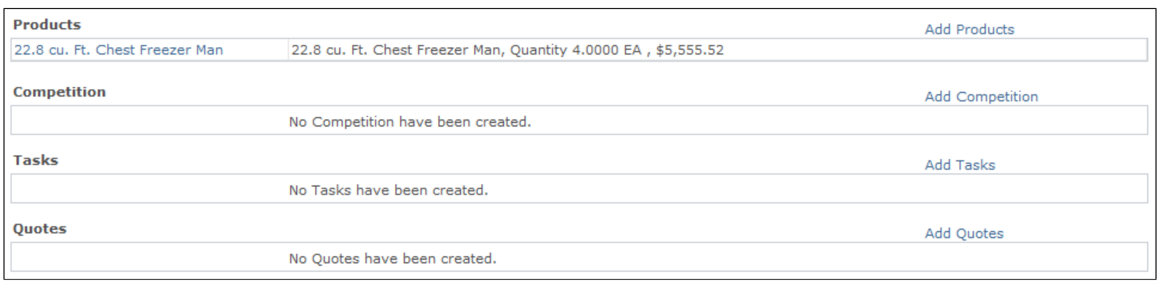


Image: Opportunity - Summary page (2 of 2)

This example illustrates the fields and controls on the Opportunity - Summary page (2 of 2).



The Summary page appears in both the Lead and the Opportunity components. As delivered, the page contents differ slightly between the two components. You can modify the page contents in the Summary Page Setup component. Both prospects and CDM customers and contacts are displayed on the Summary page.

Note: The Summary page is not visible for Higher Education leads and opportunities.

Opportunity Summary

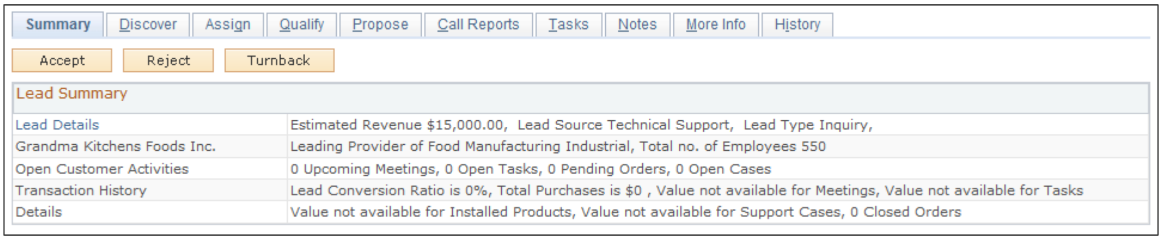
Forecast	Click to access the Forecast Summary section of the Discover page.
Sales Stage	Click to access the Sales Stage section of the Discover page.

Lead Summary

This information appears on the Lead - Summary page.

Image: Lead - Summary page

This example illustrates the fields and controls on the Lead - Summary page.



Lead Details Click to access the Details section of the Discover page.

Click the customer name to access the Customer section of the Discover page.

If the lead source is *Marketing Campaign* and the lead status is *New* or *Open*, this information appears in the Lead Summary section:

- Marketing Activity.

  Click this link to access the Campaign section of the Qualify page. From the Qualify page, you can view details of the Marketing activity that is associated with the lead. You can view marketing activity even if the activity end date is past, as long as the end response date is greater than today's date.
- Call to Action.
- Offer Description.

Common Summary Information

This information appears on both the lead summary and the opportunity summary.

Contacts Click the link for an existing contact or click the Add Contacts link to access the Contact section of the Discover page.

Call Reports Click the link to an existing call report or click the Add Call Report link to access the Call Reports page.

Notes Click the date-time link for an existing note or click the Add Notes link to access the Notes page.

Team Click the link for an existing team member or click the Add Team link to access the Assign page.

Note: As delivered, this section appears on the opportunity summary only.

Products Click the date-time link for an existing product or click the Add Products link to access the Propose page.

Competition Click the link for an existing competitor or click the Add Competition link to access the Qualify page, where you can add competitors.

Tasks	Click the date-time link for an existing task or click the Add Tasks link to access the Qualify page, where you can add tasks.
Quotes	Click the date-time link for an existing quote or click the Add Tasks link to access the Tasks page. **Note:** As delivered, this section appears on the opportunity summary only.

Related Links

Setting Up the Summary Page for Leads and Opportunities

Higher Education for Sales

Viewing Call Reports for a Lead or Opportunity

This topic discusses how to view call reports for a lead or opportunity.

Pages Used to View Call Reports for a Lead or Opportunity

Page Name	*Definition Name*	*Usage*
Lead - Call Reports Page or Opportunity - Call Reports Page	RSF_CALL_RPTS	View and add call reports for a lead.
Opportunity - Call Reports Lead - Call Reports Page or Opportunity - Call Reports Page	RSF_CALL_RPTS	View and add call reports for an opportunity.

Related Links

"Understanding Call Reports" (PeopleSoft CRM 9.2: Application Fundamentals)

Lead - Call Reports Page or Opportunity - Call Reports Page

Use the Lead - Call Reports page (RSF_CALL_RPTS) to view and add call reports for a lead.

Use the Opportunity - Call Reports page (RSF_CALL_RPTS) to view and add call reports for an opportunity.

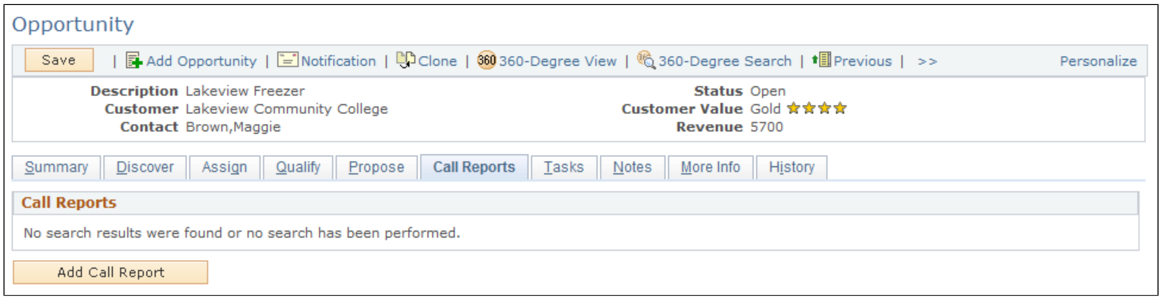
Navigation

- Sales > Search Leads > Lead - Call Reports
- Sales > Search Opportunities > Opportunity - Call Reports

Note: The Call Report pages for leads and opportunities are the same. The following example shows the Opportunity - Call Reports page.

Image: Opportunity - Call Reports page

This example illustrates the fields and controls on the Opportunity - Call Reports page.



Click the link for an existing call report to view and modify the call report detail, or click the Add Call Report button to create new call reports.

Related Links

"Working with Call Reports" (PeopleSoft CRM 9.2: Application Fundamentals)

Maintaining Profile Data for a Lead or Opportunity

This topic discusses how to maintain profile data for a lead or opportunity.

Pages Used Maintain Profile Data for a Lead or Opportunity

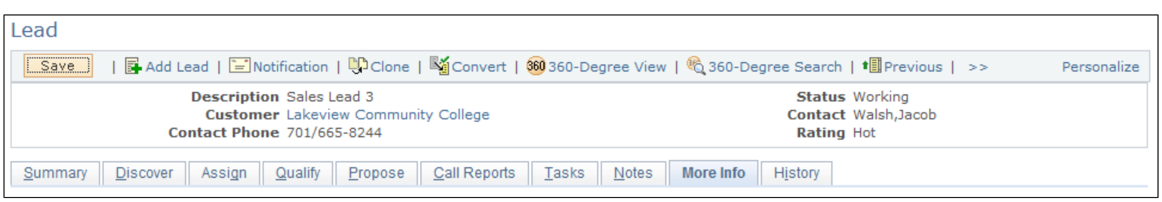
Page Name	***Definition Name***	***Usage***
Lead - More Info Page	RSF_PROFILE	Maintain profile data for a lead.
Opportunity - More Info Page	RSF_PROFILE	Maintain profile data for an opportunity.

Maintaining Profile Data for a Lead or Opportunity

Access the Lead - More Info page (Sales, Search Leads, Lead - More Info) or the Opportunity - More Info page (Sales, Search Opportunities, Opportunity - More Info).

Image: Lead - More Info page

This example illustrates the fields and controls on the Lead - More Info page.



This page displays profile fields and information that are specific to the lead or opportunity.

Related Links

Profile Enablement

"Understanding Profiles" (PeopleSoft CRM 9.2: Business Object Management)

Viewing History for a Lead or Opportunity

This topic discusses how to view the history for a lead or opportunity.

Pages Used to View History for a Lead or Opportunity

Page Name	*Definition Name*	*Usage*
Lead - History Page	RSF_LE_HISTORY	View a history of system actions regarding a lead.
Lead - History Page or Opportunity - History Page	RSF_OPP_HISTORY	View a history of system actions regarding an opportunity.

Lead - History Page or Opportunity - History Page

Use the Lead - History page (RSF_LE_HISTORY) to view a history of system actions regarding a lead.

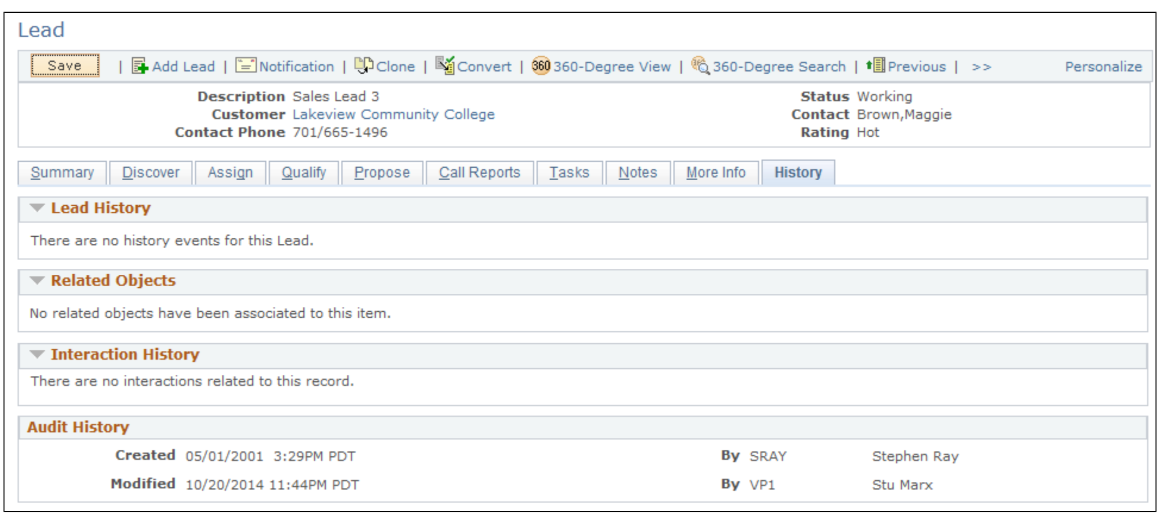
Use the Opportunity - History page (RSF_OPP_HISTORY) to view a history of system actions regarding an opportunity.

Navigation

- Sales > Search Leads > Lead - History
- Sales > Search Opportunities > Opportunity - History

Image: Lead - History page

This example illustrates the fields and controls on the Lead - History page.



Note: The History page appears in both the Lead component and the Opportunity component. Although the following example shows the Lead component, the information applies to both leads and opportunities.

<Lead/Opportunity> History

This section lists the history of changes, such as status update, rating update, change in opportunity sales stage, or reassignment of territory or sales representative that have happened to the current lead or opportunity.

Related Objects

This section lists objects that are related to the lead or opportunity, such as the associated opportunity if the current lead was converted to an opportunity, or the original lead if the current lead was a cloned object.

Interaction History

This section lists interactions (such as email messages or other correspondence) that are related to the lead or opportunity.

Related Links

History Tracking for Leads and Opportunities

Chapter 18

Sending Sales Email Messages and Correspondence

Sending Sales Proposals or Quotes to Customers

PeopleSoft Sales enables you to send a quote or a proposal package to a customer by emailing it or by sending a hard copy. A proposal package might include a cover letter, a quote, and attachments.

This topic discusses how to:

- Select the recipient of a proposal or quote.
- Create the correspondence.

Pages Used to Send Sales Proposals or Quotes to Customers

Page Name	***Definition Name***	***Usage***
Lead - Discover Page	RSF_LEAD_DETAIL	Send email to a customer contact.
Opportunity - Discover Page	RSF_OPP_DETAIL	Send email to a customer contact.
Correspondence Request Page	RBC_REQST_FORM	Create correspondence to send to a customer.
Correspondence Request: Templates Page	RBC_REQST_TEMPLATE	Edit the group of templates for the correspondence that you send to the contact.
Correspondence Request: Correspondence Summary Page	RBC_REQST_PREVIEW	Review the correspondence request.
Search Correspondence Request Page	RBC_REQST_SEARCH	Search for correspondence requests.

Opportunity - Discover Page

Use the Opportunity - Discover page (RSF_OPP_DETAIL) to send email to a customer contact.

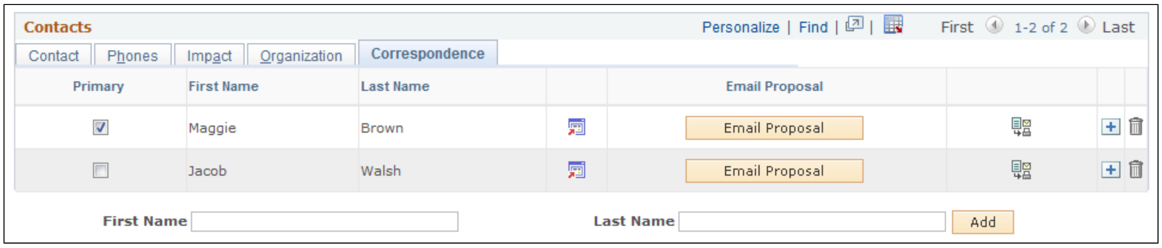
Navigation

Sales > Search Opportunities

Select an opportunity, and select the Correspondence tab in the Contacts region.

Image: Opportunities - Discover: Correspondence page

This example illustrates the fields and controls on the Opportunities - Discover: Correspondence page.



Email Proposal

Click to access the Create Correspondence page, where you can instruct the system to send an email message with the sales proposal package to the contact. The proposal package consists of a personalized cover letter and quote with related proposal documents. The cover letter is the body of the email message; and the quote and related proposal documents are attachments.

View and personalize the merged data on the Create Correspondence page.

Click the View Proposal Request button to access the Correspondence Request Detail, where you can confirm that the request is logged, determine its status, and view the error log, if any. This button becomes active after you click the Email Proposal button.

After sending the proposal by email, access the History page to confirm that the proposal was sent and to view a list of all correspondence that was sent to any contact for the lead or opportunity. You can also access the correspondence to view its contents.

Note: You can access the Correspondence Request page by clicking the Correspond button on the toolbar. When you access the Correspondence Request page in this way, the system adds all the contacts for the lead or opportunity to the recipient list of the correspondence.

Correspondence Request Page

Use the Correspondence Request page (RBC_REQST_FORM) to create correspondence to send to a customer.

Navigation

- Click the Email Proposal button on the Lead - Discover or Opportunity - Discover page.
- Click the Correspond button on the toolbar.
- On the Discover page, click the View Proposal Request button on the Correspondence tab of the Contacts section.

Image: Correspondence Request page (1 of 2)

This example illustrates the fields and controls on the Correspondence Request page (1 of 2).

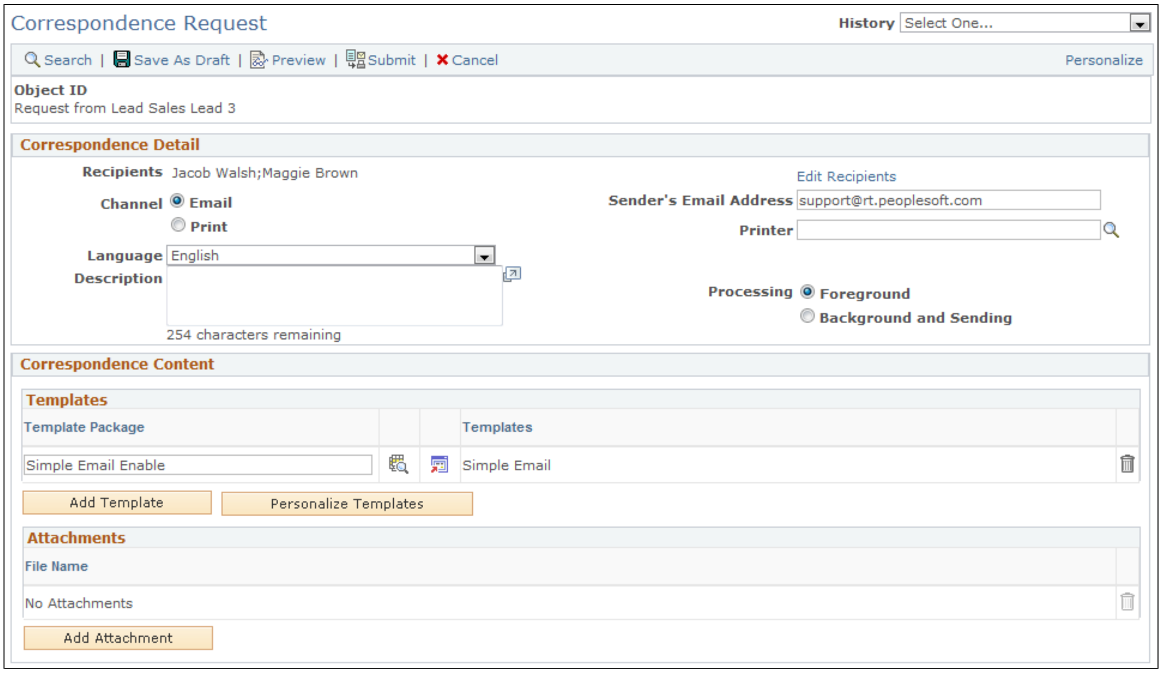
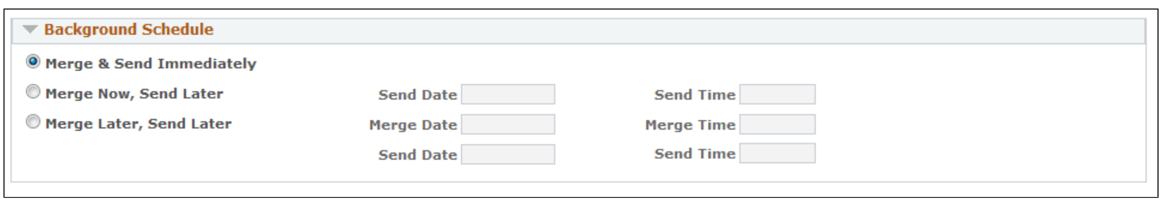


Image: Correspondence Request page (2 of 2)

This example illustrates the fields and controls on the Correspondence Request page (2 of 2).



Template Package	Select a group of templates that defines the set of documents that you send to the contact.
Personalize Templates	Click to edit the template package that is sent to the contact.

In the Background Schedule section, you can specify when to merge and send the proposal.

Related Links

"Creating Correspondence" (PeopleSoft CRM 9.2: Automation and Configuration Tools)

Sending Manual Notifications from Leads or Opportunities

Use PeopleSoft Sales to send a worklist notification with a text message and link to the current lead or opportunity. This topic discusses how to send manual notifications from leads or opportunities.

Pages Used to Send Manual Notifications from Leads or Opportunities

Page Name	***Definition Name***	***Usage***
Outbound Notification Page	RSF_LEAD_WORKLIST	Send a worklist or email notification to a sales user or team.
Outbound Notification	RSF_OPP_WORKLIST	Send a worklist notification to a sales user or team.

Outbound Notification Page

Use the Outbound Notification page (RSF_LEAD_WORKLIST or RSF_OPP_WORKLIST) to send a worklist or email notification to a sales user or team.

Navigation

- Click the Notification button on the toolbar in the Lead component.
- Click the Notification button on the toolbar in the Opportunity component.

The Transaction Summary section of this page displays information of the lead or opportunity from which the notification originates.

See "Outbound Notification Page" (PeopleSoft CRM 9.2: Automation and Configuration Tools).

Chapter 19

Viewing the Opportunity Pipeline

Understanding the Opportunity Pipeline

The opportunity pipeline is a real-time view of an organization's current sales activities. It is based on opportunities only. Leads are not included in the pipeline.

The pipeline does not include opportunities with an inactive status. Pipeline charts include activity from closed-lost opportunities as negative activity or leaks.

PeopleSoft Sales enables you to view the following types of information:

- Segment pipeline.

  This pipeline reflects current activity based on opportunities with an open status. This perspective is not constrained by time frame or period. Opportunities with the status of inactive, closed-won, or closed-lost are not included in this perspective.

  Segment pipeline types include:

  - Opportunity count
  - Revenue

- Opportunity Revenue pipeline.

  This pipeline represents estimated revenue, based on opportunities with open, closed-won, or closed-lost status.

  Opportunity Revenue pipeline types include:

  - Revenue
  - Shadow

- Product Detail pipeline.

  This pipeline represents product activity based on opportunities with open, closed-won, or closed-lost status.

  Product Detail pipeline types include:

  - Unit count
  - Revenue

- Shadow

Use pipeline types to configure different perspectives of the specified pipeline. Pipeline types include:

- Opportunity count.

  This pipeline type reflects the total number of opportunities.

- Revenue.

  This pipeline type represents estimated revenue based on allocation percentages of the opportunity sales teams.

- Shadow.

  This pipeline type represents estimated revenue based on shadow percentages of the opportunity sales team members.

- Unit count.

  This pipeline type reflects product quantities for current opportunities.

Note: You cannot save real-time views of dynamic data. Therefore, if you need to preserve a particular pipeline view, use the screen capture or print function that you use to capture or print an image of the computer screen. Alternatively, you can produce a list of the opportunities that make up the pipeline by clicking the Pipeline Opportunity List button and downloading the data to a spreadsheet.

Common Elements Used in Opportunity Pipeline

	Click the Chart Information button to have the page display a message with information about the chart.
View Pipeline As	To view the pipeline as another person would view it, select that person's name. You must have visibility of the person on the territory tree to use this feature. Viewing a pipeline as someone else enables managers to review sales users' pipelines before meeting to discuss the pipelines.
Quota Type	Select the type of quota for revenue allocation comparison. Values are: *Rollup Quota:* The sum of quotas for all sales representatives who report to the manager. This is the default. *Manager Quota:* The manager's own, individual quota.
Chart Type chartspipeline, types	Select the type of chart to use when viewing the pipeline. Values are *Bar Chart* (default), *Horizontal Bar Chart, Horizontal Stacked Bar Chart,* and *Stacked Bar Chart.*

Pipeline Opportunity List	Click to access the opportunities list, where you can view lists of the opportunities that make up the pipeline chart and select opportunities to view in detail.

Viewing the Opportunity Pipeline

This topic discusses how to:

- View the segment pipeline.
- View the opportunity revenue pipeline.
- View the product detail pipeline.

Pages Used to View the Opportunity Pipeline

Page Name	*Definition Name*	*Usage*
Segment Pipeline Page	RSF_PL_SEG	Configure and view the pipeline of opportunities at different stages of the sales process.
Opportunity Revenue Pipeline Page	RSF_PL_OPP	Configure and view the pipeline of revenue from opportunities.
Product Detail Pipeline Page	RSF_PL_PROD	Configure and view the pipeline of products that are associated with active opportunities.

Segment Pipeline Page

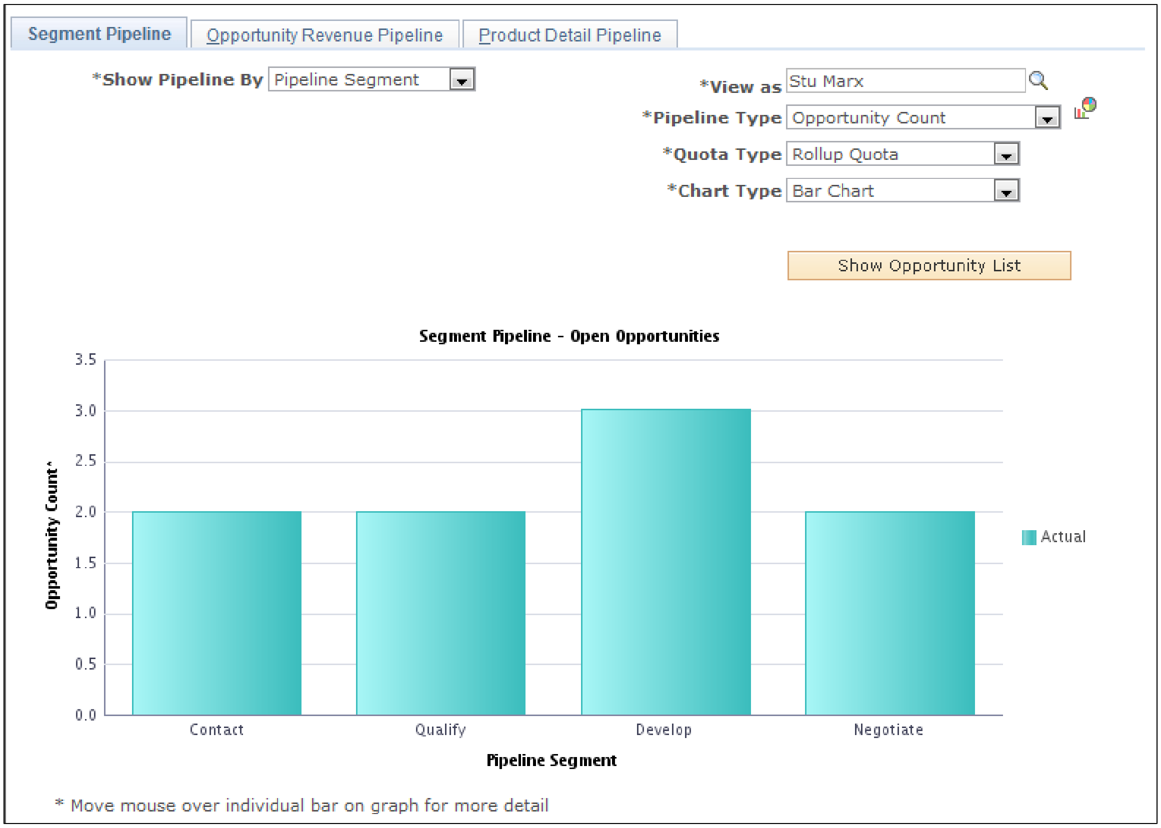
Use the Segment Pipeline page (RSF_PL_SEG) to configure and view the pipeline of opportunities at different stages of the sales process.

Navigation

Sales > Review Pipeline > Segment Pipeline

Image: Segment Pipeline page

This example illustrates the fields and controls on the Segment Pipeline page.



Show Pipeline By

Select how to organize data for the pipeline. Values are:

Business Unit.

Industry.

Pipeline Segment. Pipeline segments correlate with stages in the sales process. This is the default.

See Setting Up Pipeline Segments.

Region.

Sales User.

Territory.

Pipeline Type

Select the type of pipeline to render. Values are:

Opportunity Count: This count is based on the number of opportunities with the status of *Open.*

Revenue: This pipeline shows the estimated opportunity revenue from the opportunity sales teams' revenue allocation percentages. (You cannot render a pipeline from shadow allocations.)

Opportunity Revenue Pipeline Page

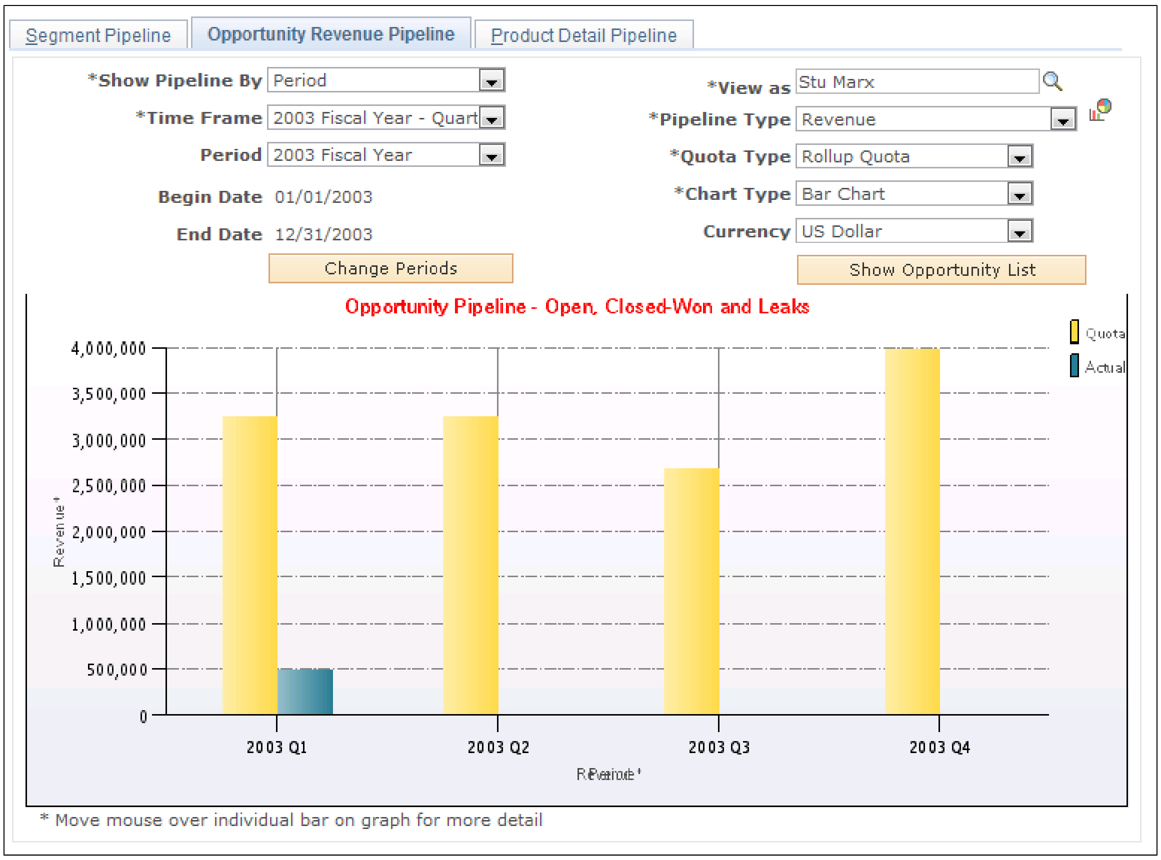
Use the Opportunity Revenue Pipeline page (RSF_PL_OPP) to configure and view the pipeline of revenue from opportunities.

Navigation

Select the Opportunity Revenue Pipeline tab on the Segment Pipeline page.

Image: Opportunity Revenue Pipeline page

This example illustrates the fields and controls on the Opportunity Revenue Pipeline page.



The Opportunity Revenue pipeline includes opportunities with estimated close dates that are within the specified time frame and with a status of open, closed-won, or closed-lost. Inactive opportunities are not included. Closed-lost opportunities appear as leaks in the pipeline.

Show Pipeline By

Select how to organize data for the pipeline. Values are:

- *Business Unit.*
- *Industry.*
- *Opportunity Status.*
- *Period.*
- *Pipeline Segment.*

	Pipeline segments correlate with stages in your sales process. This is the default. See <u>Setting Up Pipeline Segments</u>. • *Region.* • *Sales User.* • *Territory.*
Pipeline Type	Select the type of pipeline to render. Values are: • *Revenue:* This shows the estimated revenue based on opportunity sales team revenue allocations. • *Shadow:* This shows the estimated revenue based on opportunity sales team member shadow allocations.
Time Frame and **Period**	Select the time frame and reporting period to use for determining revenue in the pipeline.
Currency	Select the currency used for the pipeline revenue amounts.

Product Detail Pipeline Page

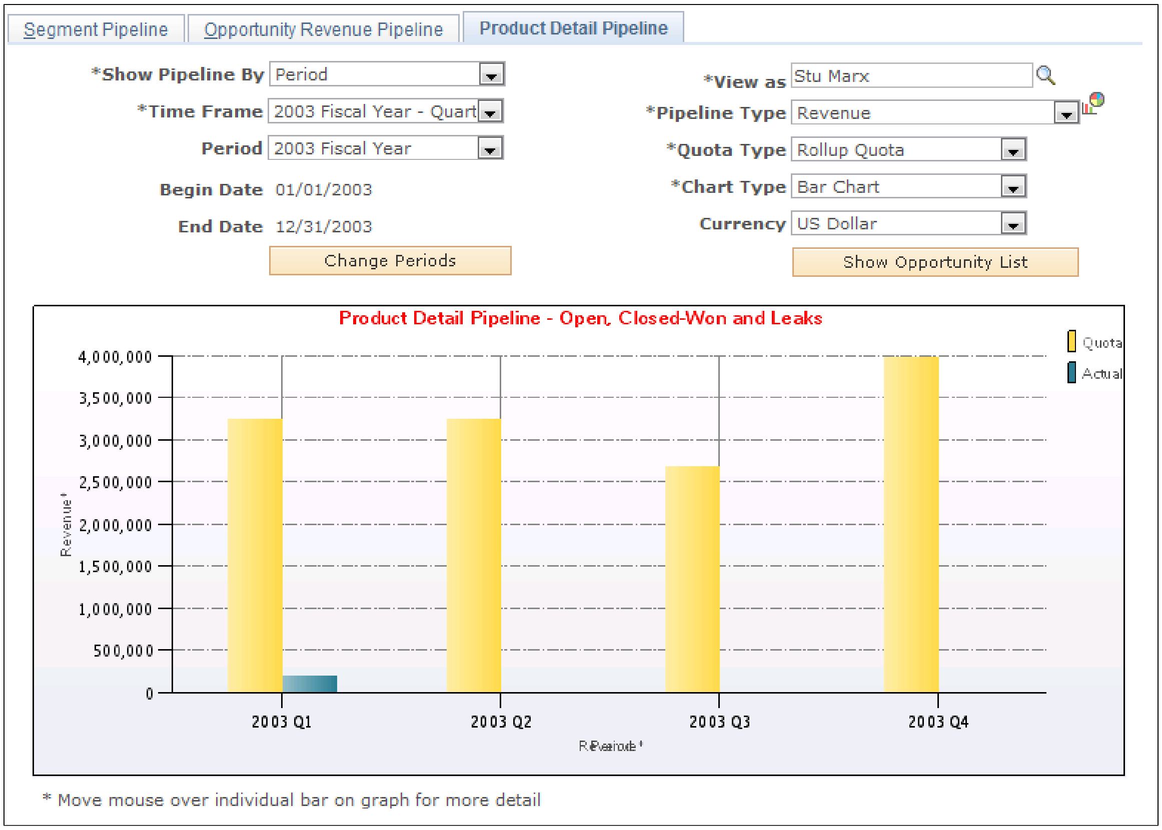
Use the Product Detail Pipeline page (RSF_PL_PROD) to configure and view the pipeline of products that are associated with active opportunities.

Navigation

Select the Product Detail Pipeline tab on the Segment Pipeline page.

Image: Product Detail Pipeline page

This example illustrates the fields and controls on the Product Detail Pipeline page.



Show Pipeline By

Select how to organize data for the pipeline. Values are:

- *Business Unit.*
- *Industry.*
- *Opportunity Status.*
- *Period.*
- *Pipeline Segment.*

  Pipeline segments correlate with stages in the sales process. This is the default.

  See Setting Up Pipeline Segments.
- *Product.*

  When you select the pipeline type of *Unit Count,* the system sets the Show Pipeline By field to *Product.*
- *Product Group.*
- *Region.*
- *Revenue Type.*

	• *Sales User*. • *Territory*.
Pipeline Type	Select the type of pipeline to render. Values are: • *Revenue:* This shows the estimated product cost based on opportunity sales team revenue allocations. This is the default. • *Shadow:* This shows the estimated product cost based on opportunity sales team member shadow allocations. • *Unit Count:* This shows the estimated product quantities.
Time Frame and **Period**	Select the time frame and reporting period to use for determining opportunities in the pipeline.

Chapter 20

Including Opportunities in Forecasts and Closing Opportunities

Understanding Opportunities Included in Forecasts

To include an opportunity's potential revenue in a sales forecast, the sales representative must update forecasting data for the opportunity. The sales representative can copy the products from the opportunity's proposal to the forecast for the opportunity.

Some companies offer products that generate recurring revenue. For example, an internet service provider may offer a one-year service contract that generates $20 per month in revenue. Other companies, such as wireless companies, offer products with both one-time and recurring revenue. For example, a wireless company might offer a package with a cellular phone (nonrecurring revenue) and a monthly calling plan (recurring revenue). PeopleSoft Sales enables you to forecast for both of these scenarios.

If an opportunity has multiple sales representatives assigned to it, the sales manager uses the Revenue Percentage tab on the Opportunity - Assign page to specify how to allocate the forecast among the sales representatives.

After the customer has made a decision, you can close the opportunity. If you have open forecasts for an opportunity that was closed-won, you can specify whether you want to continue to forecast revenue for the opportunity.

Including Opportunities in Forecasts

This topic discusses how to:

- Use the forecast summary.
- Copy products to the forecast.
- Use recurring forecasts.
- Specify revenue percentages for forecasting.
- Include forecast items in compensation calculations.

Pages Used to Include Opportunities in Forecasts

Page Name	***Definition Name***	***Usage***
Opportunity - Discover Page	RSF_OPP_DETAIL	Enter information for the forecast summary.

Page Name	***Definition Name***	***Usage***
Opportunity - Propose Page	RSF_OPP_PROPOSE	Include an opportunity in the forecast.
Copy Products to Forecast Page	RSF_OPP_COPYFCAST	View and verify products to copy to forecasts.
Distribute Recurring Revenue Page	RSF_OPP_DISTRIB	Enter recurring revenue.
Send to EIM from Sales Page	RSF_SENDTO_EIM_SEC	Send forecast information to PeopleSoft Incentive Management.

Opportunity - Discover Page

Use the Opportunity - Discover page (RSF_OPP_DETAIL) to enter information for the forecast summary.

Navigation

Sales > Search Opportunities > Discover

Image: Opportunity - Discover page (1 of 2)

This example illustrates the fields and controls on the Opportunity - Discover page (1 of 2).

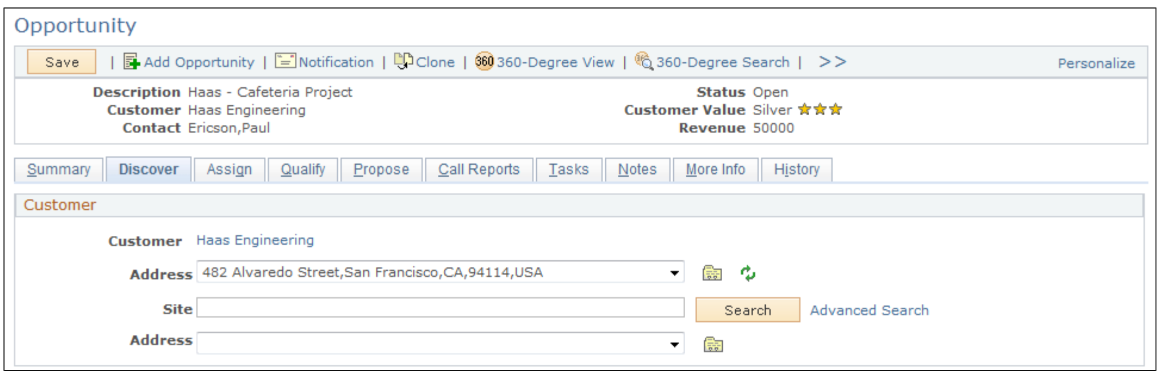
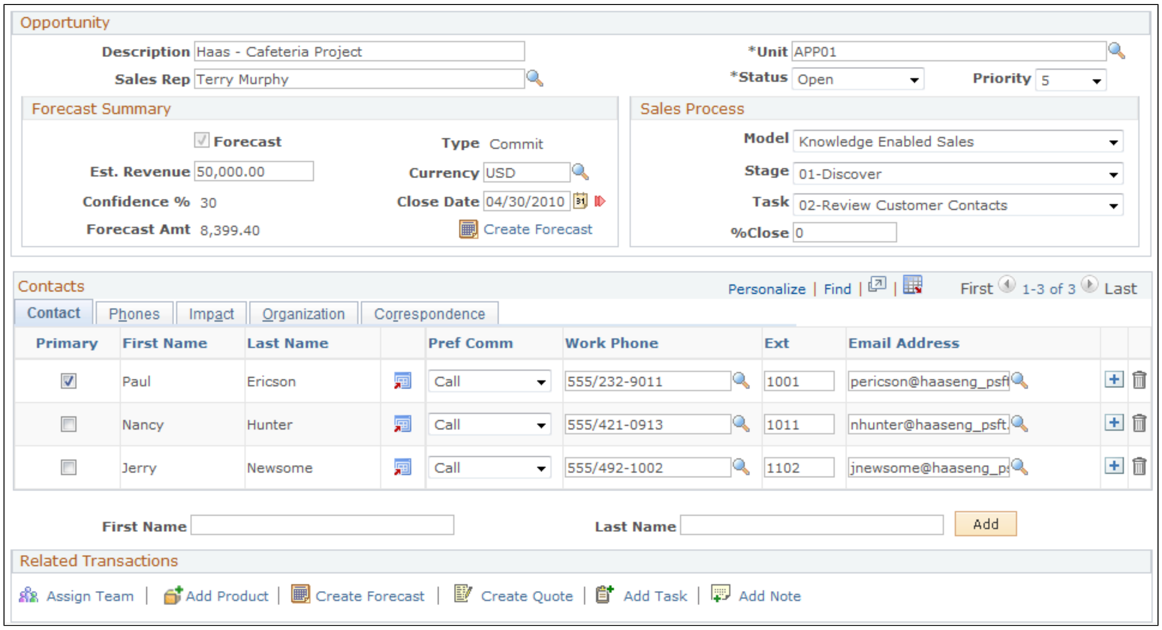


Image: Opportunity - Discover page (2 of 2)

This example illustrates the fields and controls on the Opportunity - Discover page (2 of 2).



If you want to include an opportunity's revenue on a forecast but don't want to specify the actual products, you can use the Forecast Summary group box on the Opportunity - Discover page.

Forecast Summary

Forecast	Select to include this opportunity in generated forecasts. When you save the page, the system copies the estimated revenue into the Forecast Amount field on this page, and it adds the opportunity in the Forecast grid of the Opportunity - Propose page.
Type	If you select Forecast, you must select the type of forecast to use. You define forecast types on the Forecast Type page. See Forecast Type Page.
Est. Revenue (estimated revenue)	Enter the amount of revenue that is anticipated from the sale.
Currency	Enter the currency code for the revenue. The default currency code is the code that is associated with the sales user on the Sales User page. If no products are associated with the opportunity, you can override the default currency code. Doing so changes the currency here and on the Product page.
Confidence % (confidence percentage)	Displays the average degree of confidence (expressed as a percentage) that the assigned sales representative feels that the opportunity will result in a closed sale. If you have not entered

	product forecast rows on the Opportunity - Propose page, you can manually enter the confidence percentage here. After products are forecast, this field is display-only and shows the average of all confidence percentages for the opportunity from the Forecast grid of the Opportunity - Propose page. For example, if there are three products identified for forecasting from this opportunity—the first with a confidence of 70 percent, the second with 80 percent, and the last with 90 percent—the system calculates the average, as follows: (70 + 80 + 90) ÷ 3 = 80. The system displays that result here.
Close Date	Enter a date for the amount that is forecast.
Forecast Amt (forecast amount)	If you select the Forecast check box, a forecast amount must be specified. There are two ways that this can happen: • If the opportunity is not yet forecast and you select the Forecast check box, then the system copies the estimated revenue amount into this field when you save the page. You can override this value. • You can enter the forecast amount.
Create Forecast	Click this link to create a forecast on the Opportunity - Propose page.

Opportunity - Propose Page

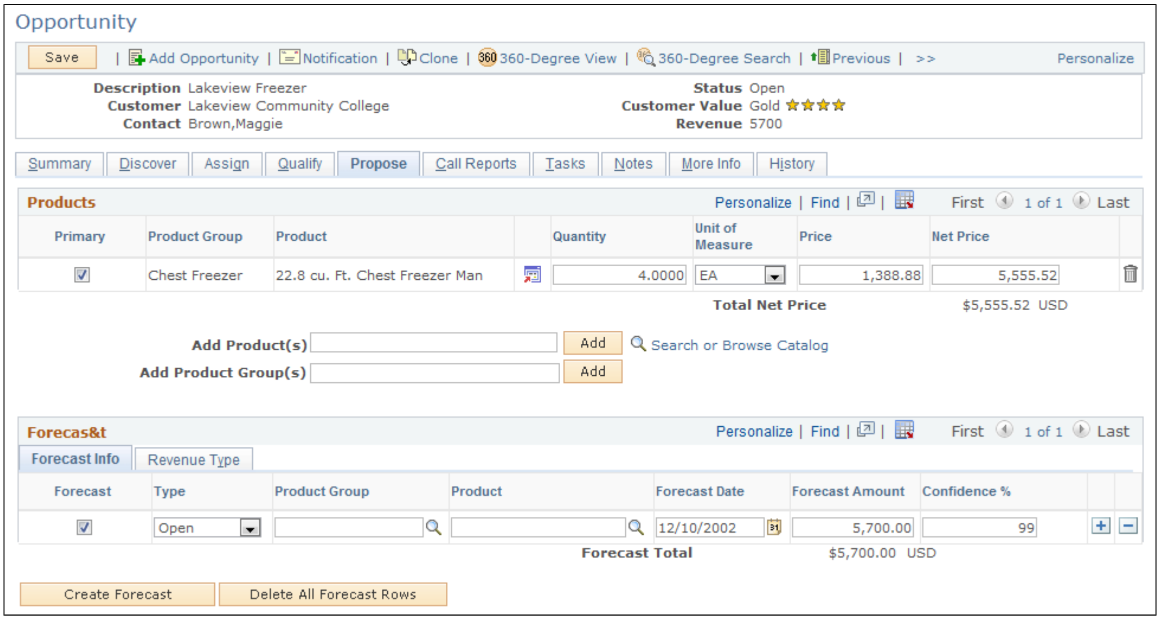
Use the Opportunity - Propose page (RSF_OPP_PROPOSE) to include an opportunity in the forecast.

Navigation

Sales >Search Opportunities >Propose

Image: Opportunity - Propose page

This example illustrates the fields and controls on the Opportunity - Propose page.



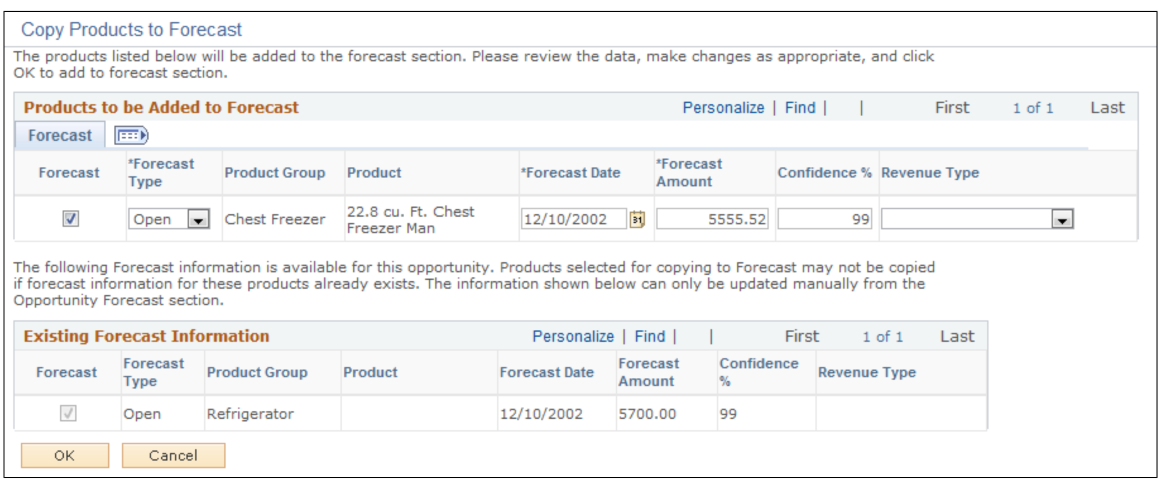
If you want to include an opportunity's products on a forecast, you can copy the products to the Forecast grid of the Opportunity - Propose page.

Click the Create Forecast button to access the Copy Products to Forecast page.

Note: If there is existing forecast information when you click the Create Forecast button, the system displays the existing forecast on the Copy Products to Forecast page. You cannot copy products to the forecast if the forecast already exists for the products.

Image: Copy Products to Forecast page

This example illustrates the fields and controls on the Copy Products to Forecast page.



After you enter forecast information on the Copy Products to Forecast page and click OK, the system adds the information to the Forecast grid of the Opportunity - Propose page.

Forecast	Select this check box to include the revenue in the forecast.
Forecast Type	Select a user-defined forecast type. See Forecast Type Page.
Forecast Amount	Enter a forecast amount.
Confidence % (confidence percentage)	Enter a whole number the specifies the probability that the forecast will become an actual sale.
Revenue Type	(Optional) Select a user-defined revenue type. See Revenue Type Page.

Using Recurring Forecasts

Access the Opportunity - Propose page (Sales, Search Opportunities, Propose).

If the product has recurring revenue, the system displays the following fields:

Recurring Freq. (recurring frequency)	Select the period of time for the recurring revenue. Values are *Daily, Weekly, Monthly, Quarterly,* and *Yearly*.
Recurring Price	Enter the recurring revenue for each period of time.

To create a forecast for recurring revenue, click the Create Forecast button to access the Copy Products to Forecast page, and select the Recurring tab.

Enter the forecast information, including the number of periods for the recurring revenue. You can click the Distribution link to access the Distribute Recurring Revenue page, where you can view or modify the distribution of recurring revenue over a period of time. If you do not access this page but you select the Forecast check box, the system populates the Forecast grid on the Opportunity - Propose page with recurring revenue based on the values specified on the Recurring tab.

Make any changes in the Distribution Details group box, and then click the Rebuild Revenue Periods button to refresh the data in the Revenue Periods grid. The system populates the first forecast date with the value in the Start Date field and then creates additional forecast dates based on the value in the Recurring Frequency field. Click the Calculate button to generate a value for the Recurring Total field.

If you change the forecast amount, then when you access the Recurring tab of the Copy Products to Forecast page, the system displays a Review link instead of the Distribute link to indicate that manual changes have occurred.

To enter nonrecurring revenue, select the Non-Recurring tab of the Copy Products to Forecast page.

The system populates the Forecast grid of the Opportunity - Propose page with both the recurring and nonrecurring revenue. The nonrecurring revenue does not have a value in the Recur Period field. This grid contains the data that system uses to populate the Forecast page when a sales representative uses the Add Forecast component or when a sales manager uses the Search Forecasts component to auto-forecast.

Compensate Selected

Click to send the selected forecasts to PeopleSoft Incentive Management. This button appears only if you have selected Incentive Management as an installation option.

Opportunity - Assign Page

Use the Opportunity - Assign page (RSF_OPP_ASSIGN) to include an opportunity in the forecast.

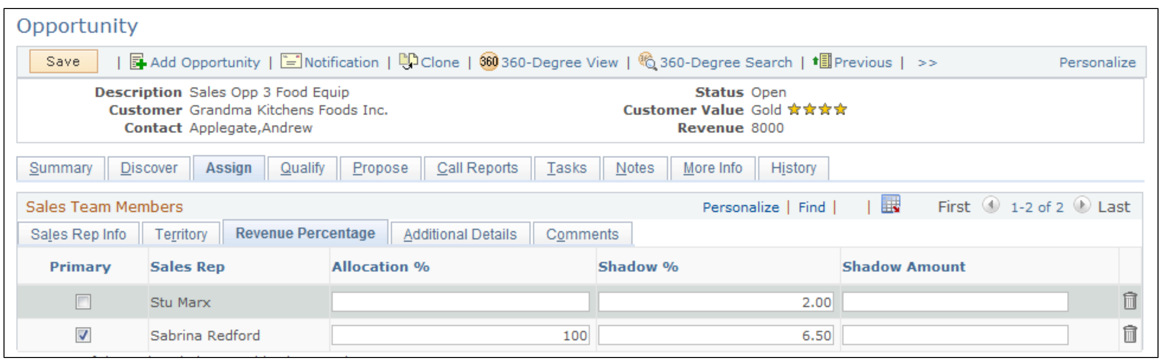
Navigation

Sales >Search Opportunities >Assign

Note: The Revenue Percentage tab may be hidden in the Opportunities component, depending on the access profile of the user. Typically, only sales managers have access to this tab.

Image: Opportunity - Assign page: Revenue Percentage tab

This example illustrates the fields and controls on the Opportunity - Assign page: Revenue Percentage tab.



Note: Revenue allocations are required for the system to roll up an opportunity into pipelines and forecasts. Only opportunities can be rolled up into pipelines and forecasts. You cannot include leads in pipelines and forecasts. Therefore, the Revenue Percentage tab appears in the Opportunity component only. There is no equivalent tab in the Lead component.

Allocation % (allocation percentage)

Enter the percentage of the total revenue to allocate to this member of the sales team for forecasting.

Often, 100 percent of the revenue is allocated to the primary member of the sales team, but it can also be distributed across two or more members of the team. The sum of the allocation percentages must total 100 percent.

Shadow % (shadow percentage)

Enter the percentage of revenue that the individual is expected to earn.

Note: The sum of the shadow percentages does not have to equal 100 percent.

Shadow Amount

Enter a lump sum amount that the individual is expected to earn.

Send to EIM from Sales Page

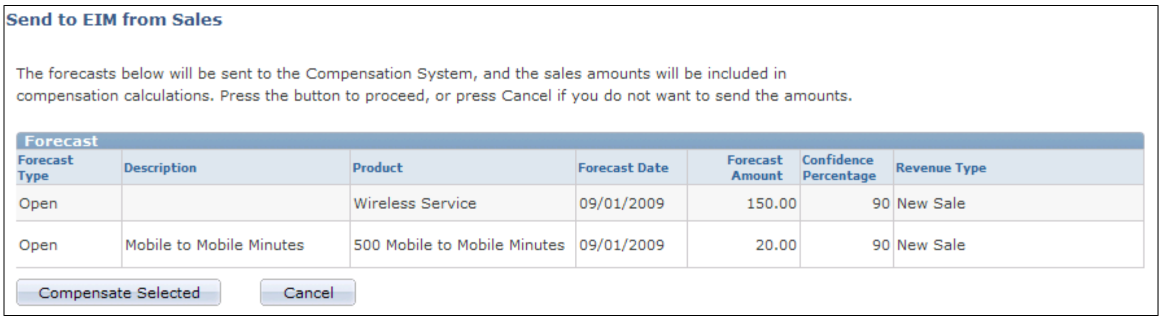
Use the Send to EIM from Sales page (RSF_SENDTO_EIM_SEC) to send forecast information to PeopleSoft Incentive Management.

Navigation

On the Opportunity - Propose page, click the Compensate Selected button.

Image: Send to EIM from Sales page

This example illustrates the fields and controls on the Send to EIM from Sales page.



You can integrate PeopleSoft Incentive Management with PeopleSoft Sales to include opportunity revenues in compensation calculations. You can set up a single sign-on between the two databases and exchange opportunity forecasting data between PeopleSoft Sales and PeopleSoft Incentive Management. To enable Incentive Management, access the General Options page by navigating to Set Up CRM > Install > Installation Options. Select the Incentive Management check box.

On the Send to EIM from Sales page, click the Compensate Selected button to send the forecasts to PeopleSoft Incentive Management.

See *PeopleSoft Enterprise Components for PeopleSoft Enterprise Incentive Management 8.9 PeopleBook.*

Closing Opportunities

This topic discusses how to close opportunities.

Page Used to Close Opportunities

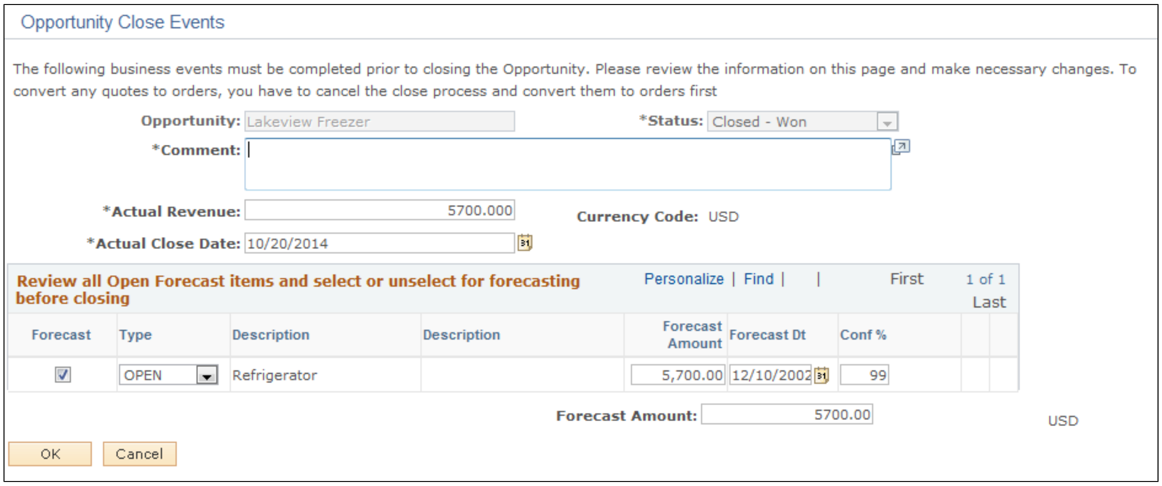
Page Name	***Definition Name***	***Usage***
Closing Opportunities	RSF_OPP_CLOSE_SEC	Close an opportunity.

Closing Opportunities

To close an opportunity, access the Opportunity - Discover page (Sales, Search Opportunities), and enter the appropriate value in the Status field. Values are *Closed - Won* and *Closed - Lost.* When you save the page, the Opportunity Close Events page appears.

Image: Opportunity Close Events page

This example illustrates the fields and controls on the Opportunity Close Events page.



Note: When an opportunity includes a prospect customer and you change its status to *Closed - Won*, you must either create a new Customer Data Model (CDM) customer using quick create or select an existing customer. You also have the option to push any prospect contacts to the CDM when saving the opportunity.

You must enter comments and other data here to close an opportunity successfully. Also, you must review the forecast items and either select or deselect the Forecast check box to include them in the forecast or exclude them.

After you close the opportunity, the system displays the actual close date and actual revenue on the Close tab of the Opportunities List page for the opportunity.

Comment	Enter a reason for the win or loss.
Actual Revenue	Displays the actual revenue from the closed-won opportunities. An actual revenue amount is required to close the opportunity successfully.
Actual Close Date	Enter the close date; the system's current date is the default.
Forecast	Select for each item that you want to include in forecasting from the closed opportunity. Ensure that the check box is deselected for all items that you do not want to include in forecasting. Items from a closed-lost opportunity that have the Forecast check box selected appear in the pipeline as leaks. You cannot forecast revenue for a closed-lost opportunity. See Including Opportunities in Forecasts.

Chapter 21

Understanding Sales Forecasts

Forecasts

In PeopleSoft Sales, forecasts are estimates of future sales revenues based on current opportunities, their projected revenue estimates, closing dates, and other factors. If your access profile permits, you can edit forecast data and add rows to make adjustments to forecasts. You might combine the forecasts of 10 team members to produce one roll-up forecast for the team. You can view forecasts at a summary level and then filter and sort summaries for analysis.

You can generate forecast subtotals, and you can create charts to view forecasts graphically. You can also use the Combined Forecasts page and the standard download feature to export forecast data to financial modeling programs outside the database.

PeopleSoft Sales enables you to configure forecasting to meet your organization's business processes and reporting period needs. Sales representatives can generate and view their own forecasts and submit them to management at the appropriate reporting times. Managers can generate forecasts for sales representatives that are visible to them on the territory tree. Senior managers can view an overall forecast of all their groups by generating one high-level roll-up forecast that provides an overview of the organization's outlook.

In PeopleSoft Sales, sales representatives, managers, and financial analysts work with sets of data determined by their user access profiles and territory tree visibility. In this way, managers in one division have access to their staff's data but not to the data of another division.

PeopleSoft Sales forecasts are based on:

- The structure of sales territory trees.
- Opportunity details managed by sales representatives.
- Revenue and shadow forecast allocations, which reflect the percentages of opportunity activity attributed to each opportunity team member's forecast.

Revenue and Shadow Forecasts

PeopleSoft Sales provides two forecast variants, each with a different focus:

- Revenue forecasts are projections of an organization's opportunity activity from a financial perspective; they provide information about the amount of revenue coming into the enterprise.

  A revenue forecast is based on the opportunity team's allocation percentage. Typically, 100 percent is allocated to one sales representative on an opportunity for the purpose of revenue forecasts. However, you can distribute the allocation percentage across two or more opportunity team members. The allocation percentage for an opportunity team must total 100 percent.

Revenue forecasts are also known as split revenues. Revenue forecast amounts are calculated by multiplying the estimated revenue amount by the team member's allocation percentage.

- Shadow forecasts are projections of an organization's opportunity activity from an operational perspective; they enable you to evaluate the performance of sales staff by comparing quotas to shadow revenue allocations.

  A shadow forecast is based on the opportunity team's shadow percentages. The shadow forecast is operational in nature. The shadow percentage for an opportunity team does not have to total 100 percent. In the event that the total is greater than 100 percent, the amount over 100 percent is double-counted.

  Shadow forecasts are also known as double counts; however, not every shadow forecast includes a double count. Shadow forecast amounts are calculated by multiplying the estimated revenue amount by the sales user's shadow percentage and then adding the shadow amount.

The following table shows three ways that you might assign revenue and shadow allocations to two representatives, SREP1 and SREP2, who are working on an opportunity. The table also shows how those allocations affect corresponding forecasts:

	Opportunity 1	***Opportunity 2***	***Opportunity 3***
Customer	Lakeview Community College	Grandma's Foods	MMA Property Management
Product Group	Air Conditioners	Freezers	Refrigerators
Forecast Amount	100,000 USD	600,000 USD	1,000,000 USD
Close Date	March 31, 2001	March 31, 2001	March 31, 2001
Revenue Allocation	SREP1 = 100 percent	• SREP1 = 50 percent • SREP2 = 50 percent	• SREP1 = 100 percent • SREP2 = 0 percent
Shadow Allocation	SREP1 = 100 percent	• SREP1 = 50 percent • SREP2 = 50 percent	• SREP1 = 100 percent • SREP2 = 25 percent

	Opportunity 1	*Opportunity 2*	*Opportunity 3*
Scenario and Forecast Results	One representative handles the deal and receives all of the credit: • 100,000 USD appears on SREP1's Revenue forecast. • 100,000 USD appears on SREP1's Shadow forecast.	Two representatives handle the deal and split the amount equally: • 300,000 USD appears on SREP1's Revenue forecast. • 300,000 USD appears on SREP2's Revenue forecast. • 300,000 USD appears on SREP1's Shadow forecast. • 300,000 USD appears on SREP2's Shadow forecast.	SREP1 owns the deal. SREP2 assists and receives partial shadow credit: • 1,000,000 USD appears on SREP1's Revenue forecast. • 0 USD appears on SREP2's Revenue forecast. • 1,000,000 USD appears on SREP1's Shadow forecast. SREP1 receives full credit toward the representative's quota. • 250,000 USD appears on SREP2's Shadow forecast. SREP2 receives partial credit toward the representative's quota for assisting with the deal.

Chapter 22

Using Forecasts

Understanding Forecast Functionality in PeopleSoft Sales

PeopleSoft Sales offers forecast functionality for two groups of users:

- Sales representatives can add a new forecast or adjust their own forecasts using the Search My Forecasts component.
- Sales managers can roll up, adjust, and analyze forecasts using the Search Rollup Forecasts component.

These two components use a similar interface to select a forecast.

Typically, sales managers ask sales representatives to create and adjust forecasts by a certain date. When the sales representatives are comfortable with their forecast numbers, they submit their forecasts. Alternatively, sales managers might ask sales representatives to update their opportunities, for example, by the last day of each month, and then use autoforecasting to build forecasts directly from the opportunities. In either case, the sales managers can roll up forecasts for all their sales representatives and analyze the forecast for a territory. The forecasts that roll up under a manager depend on the structure of the territory tree.

Selecting a Forecast

This topic discusses how to view forecast lists.

Pages Used to Select a Forecast

Page Name	***Definition Name***	***Usage***
Search for an Existing Forecast Page	RSF_FCAST_SEARCH	View a list of revenue or shadow forecasts. You can select a forecast to view it in more detail.
Search for an Existing Forecast Page	RSF_FCAST_R_SEARCH	View a list of revenue forecasts, shadow forecasts, and empty forecasts. You can select a forecast to view it in more detail, or you can select an empty forecast for use in generating a new revenue forecast.

Search for an Existing Forecast Page

Use the Search for an Existing Forecast page (RSF_FCAST_R_SEARCH) to view a list of revenue forecasts, shadow forecasts, and empty forecasts.

You can select a forecast to view it in more detail, or you can select an empty forecast for use in generating a new revenue forecast.

Navigation

Sales > Search Rollup Forecasts > Search for an Existing Forecast

Image: Search for an Existing Forecast page (1 of 2)

This example illustrates the fields and controls on the Search for an Existing Forecast page (1 of 2).

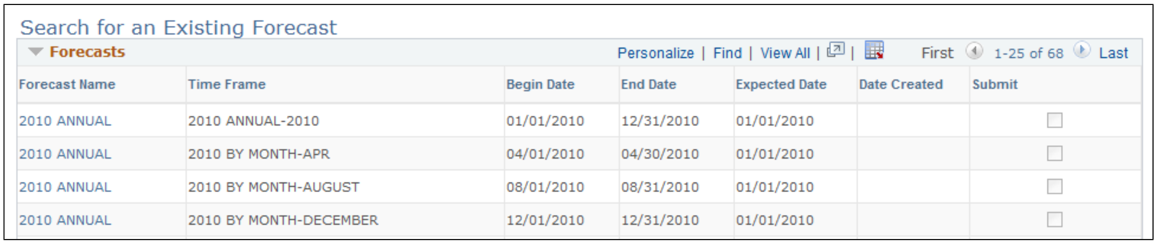
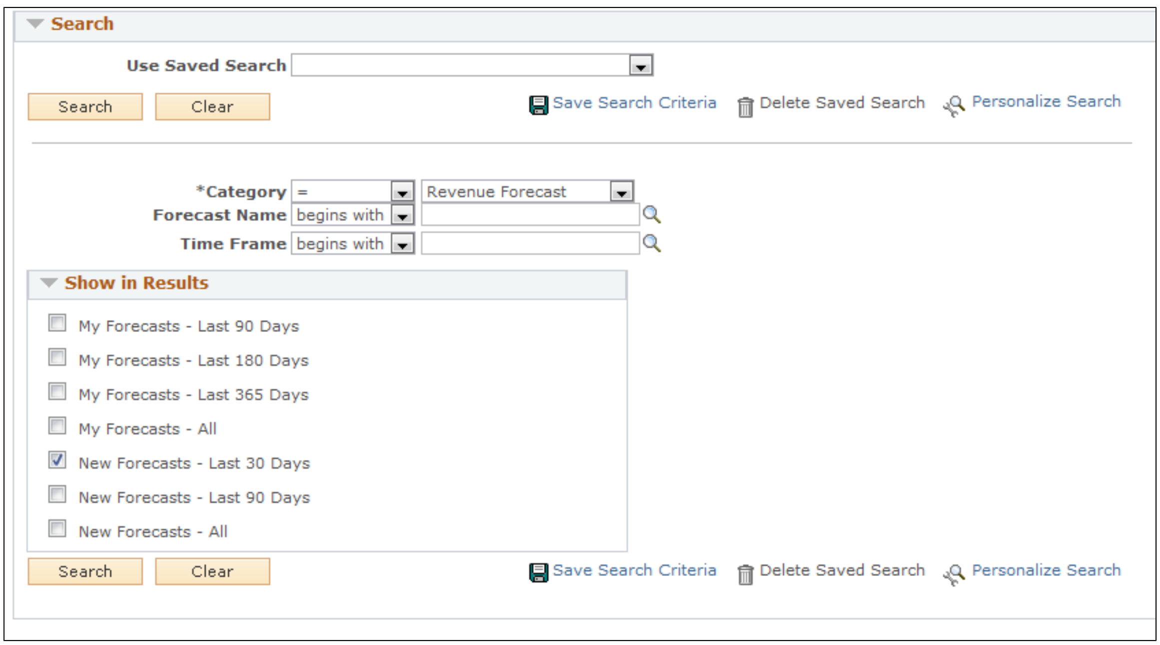


Image: Search for an Existing Forecast page (2 of 2)

This example illustrates the fields and controls on the Search for an Existing Forecast page (2 of 2).



Entering Search Parameters

Select filter options in the Show in Results group box. When you click Search, the system lists the search results at the top of the page.

Category Select *Revenue Forecast* or *Shadow Forecast.*

My Forecasts Select any My Forecasts option to search for generated forecasts that contain forecast data for a sales user. These forecasts have an entry in the Date Created column.

New Forecasts	Select any New Forecasts option to search for forecasts that are empty or do not have data for a sales user. Use these empty forecasts to generate a new forecast.

Note: The search results list does not separate the generated forecasts and the new forecasts. If you select options to display both types of forecasts, you can click the Date Created link to sort the empty forecasts from those that have data.

Viewing Generated Forecasts

Forecast Name	Click to access the Forecast page to either view data for a generated forecast or enter data to generate a new forecast. If your access profile permits you to adjust forecasts and you have not submitted the forecast, you can also edit forecast data.
Time Frame, Begin Date, End Date, and **Expected Date**	Displays values from the corresponding generated forecast or new forecast template.
Date Created	Identifies the date when the forecast was generated. New forecasts that have not yet been generated and have no data do not have forecast dates.
Submit	When selected, indicates that the forecast was submitted to a manager and its detail is not editable.

Selecting a New Forecast

Select the type of forecast to create from the items that begin with the words *New Forecast* in the Show in Results group box.

Note: When you search for new forecasts, the system displays combinations of forecast names and time frames. If you have defined a forecast name but the system does not display it, check the expected start date and status of the forecast name.

See Forecast Name Page.

Adding and Adjusting Forecasts

This topic discusses how to:

- Add and adjust sales forecasts.
- Calculate forecast subtotals.
- Generate forecast charts.

Pages Used to Add and Adjust Forecasts

Page Name	*Definition Name*	*Usage*
Forecast - Forecast Page	RSF_FCAST_ENTER	Adjust a sales forecast that is based on an individual sales representative's revenue allocations for working opportunities.
Forecast - Subtotals Page	RSF_FCAST_SUMMARY	Calculate and view the subtotals of a revenue forecast.
Forecast - Chart Page	RSF_FCAST_CHART	Generate a chart of the revenue forecast.

Forecast - Forecast Page

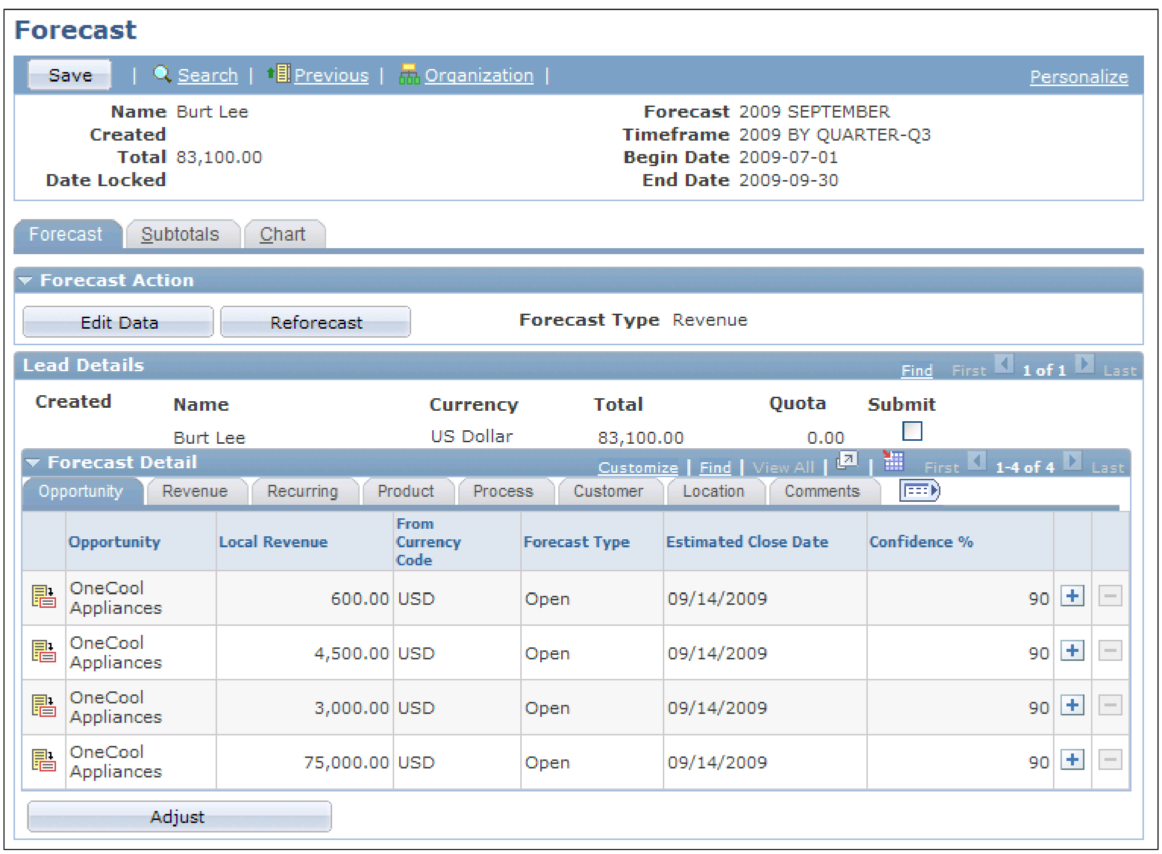
Use the Forecast - Forecast page (RSF_FCAST_ENTER) to adjust a sales forecast that is based on an individual sales representative's revenue allocations for working opportunities.

Navigation

Sales > Search My Forecasts > Forecast - Forecast

Image: Forecast - Forecast page

This example illustrates the fields and controls on the Forecast - Forecast page.



This page displays the selected sales users' opportunities that have forecasted dates within the specified time frame and a status of either *Open* or *Closed - Won.* Forecasts do not include opportunities with the status *Closed - Lost* or *Inactive.*

You can view forecast data on each of the tabs on this page.

Edit Data and **Display Only**	Click the Edit Data button to access edit mode and then enter and modify data. After you access edit mode, the system renames the button Display Only. You can return to display-only mode by clicking this button. The Edit Data button is enabled only if your access profile permits you to edit forecasts.
Reforecast	Click to regenerate the forecast. This action eliminates all modifications and adjustments, and reruns the forecast based on current opportunity data. You cannot reforecast or make changes to a forecast once it is submitted.
Submit and **Submit All**	Select to submit the forecast when you save the page. Submitting a forecast makes it available to managers. Managers can view all forecasts, submitted or not, if the sales access profile is set to permit viewing unsubmitted forecasts. You cannot make changes to a forecast once it is submitted. **Note:** The Submit All check box appears only if your user profile permits you to submit multiple forecasts.
Local Revenue	Enter the amount of revenue that is anticipated from the sale.
From Currency Code	Enter the sales user's currency code.
Forecast Type	Select a user-defined forecast type. See Forecast Type Page.
Estimated Close Date	Enter the forecast estimated date that the sale will occur.
Confidence % (confidence percentage)	Enter a whole number that specifies the probability that the forecast will become an actual sale.
Adjust	Click to add a row and make adjustments to the sales user's forecast data. Adjustments affect the totals and are directly associated with the sales representative who makes the adjustment.

Forecast - Subtotals Page

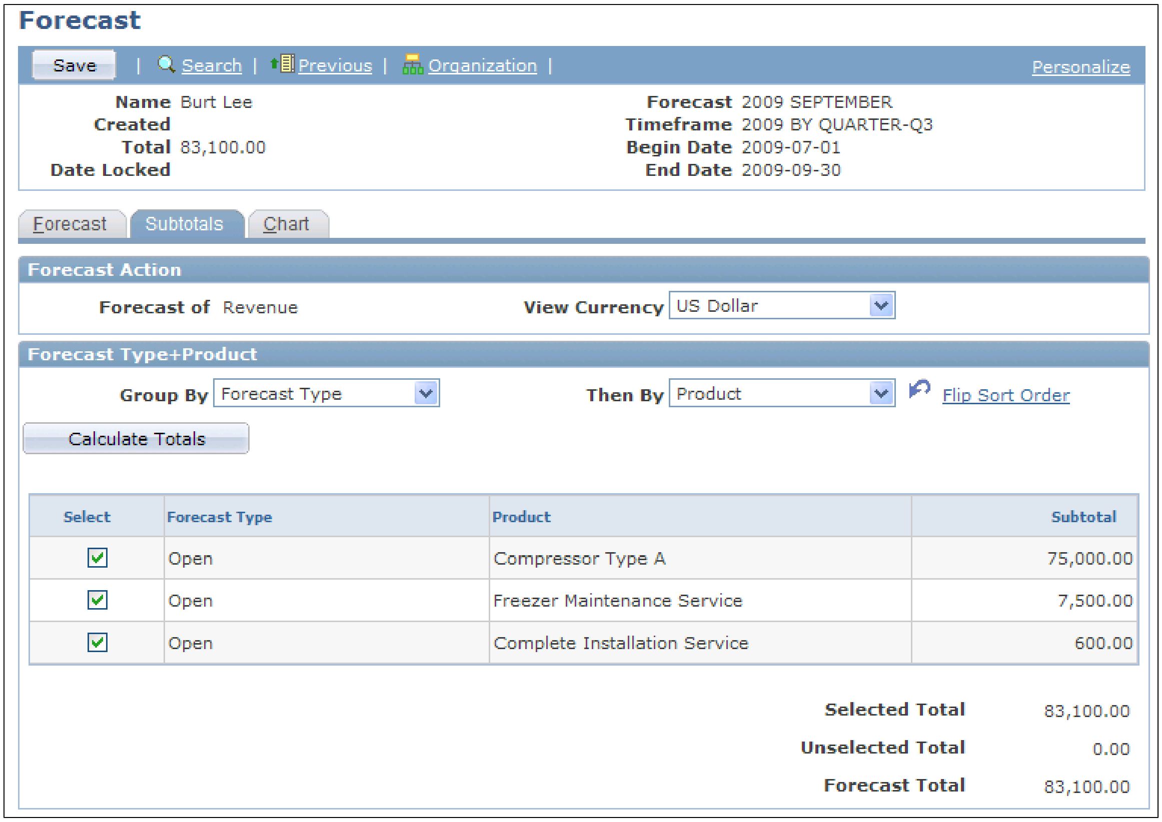
Use the Forecast - Subtotals page (RSF_FCAST_SUMMARY) to calculate and view the subtotals of a revenue forecast.

Navigation

Sales > Search My Forecasts > Forecast - Subtotals

Image: Forecast - Subtotals page

This example illustrates the fields and controls on the Forecast - Subtotals page.



View Currency

Select the currency in which to express the forecast amounts. The default is the sales user's default currency.

Group By and **Then By**

You can use subtotals to generate and view a forecast's subsets. For example, suppose that the overall forecast is for November 2004 and you want to know the confidence levels that make up the forecast and you want to know those levels by region. In that case, you would select *Confidence %* in the Group By field and *Region* in the Then By field.

Note: You must enter a value in the Group By field to use subtotals.

Select

Select the check box next to each item that you want to group into a separate subtotal. The sum for the selected items appears as the selected total, and the sum of items that are not selected is the unselected total.

For example, if 10 rows appear and you select this check box for the first, third, and fifth rows, then the selected total is the sum of the first, third, and fifth rows. The unselected total is the sum of the seven rows that you did not select.

Forecast - Chart Page

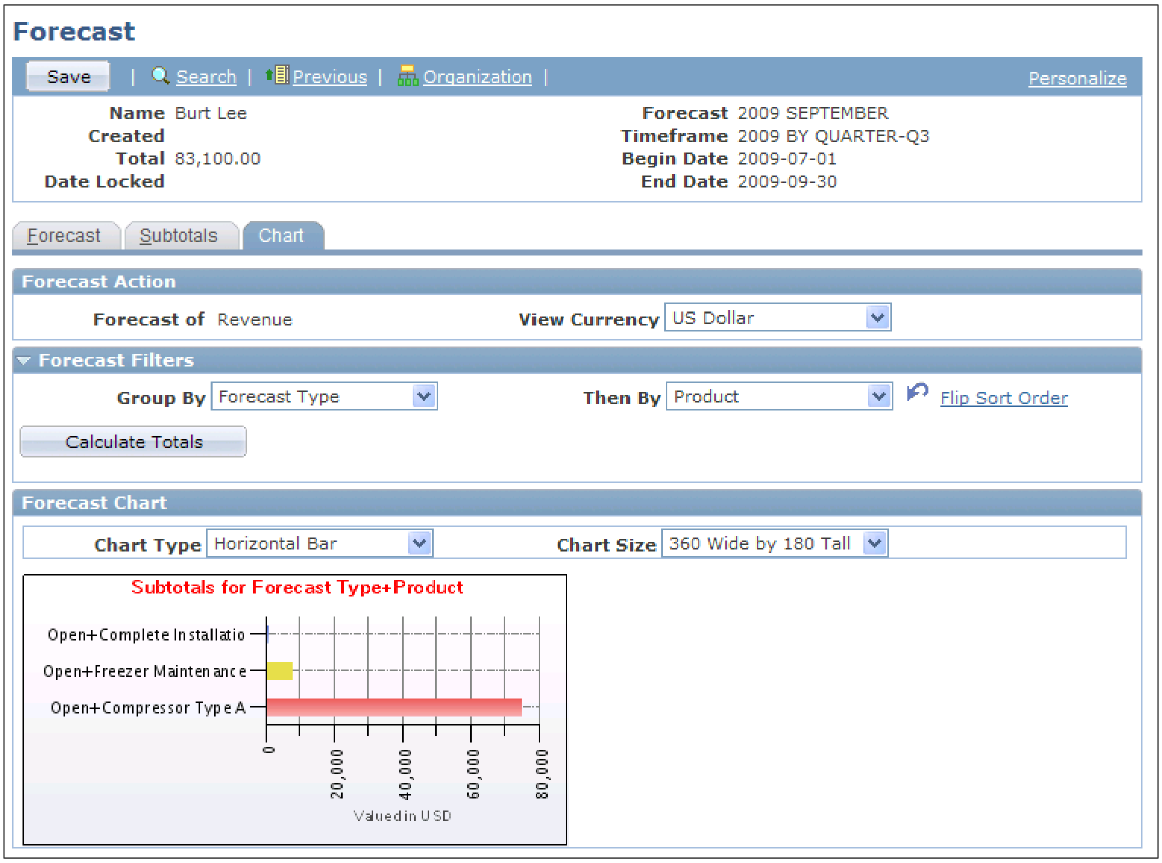
Use the Forecast - Chart page (RSF_FCAST_CHART) to generate a chart of the revenue forecast.

Navigation

Sales > Search My Forecasts > Forecast - Chart

Image: Forecast - Chart page

This example illustrates the fields and controls on the Forecast - Chart page.



View Currency	If you specified the currency on the Subtotals page, the system carries it over to here. If you did not, specify it here.
Group By and **Then By**	If you specified subtotals on the Subtotals page, the system carries them over to here. If you did not, specify them here. **Note:** You must have a value in the Group By field to generate a chart.
Chart Type	Specify the type of chart to generate. Values include *Bar Chart,* *Horizontal Bar Chart,* *Horizontal Stacked Bar Chart,* and *Stacked Bar Chart.*
Chart Size	Specify the size of the chart.

Generating Forecasts Automatically

This topic discusses how to generate forecasts automatically.

Page Used to Generate Revenue or Shadow Forecasts Automatically

Page Name	*Definition Name*	*Usage*
Auto Generate Forecasts Page	RSF_FCAST_RUN	Run the Auto Generate Forecast Application Engine process (RSF_FCST) to generate revenue or shadow forecasts for direct reports or for all people who are visible to you on the territory tree.

Auto Generate Forecasts Page

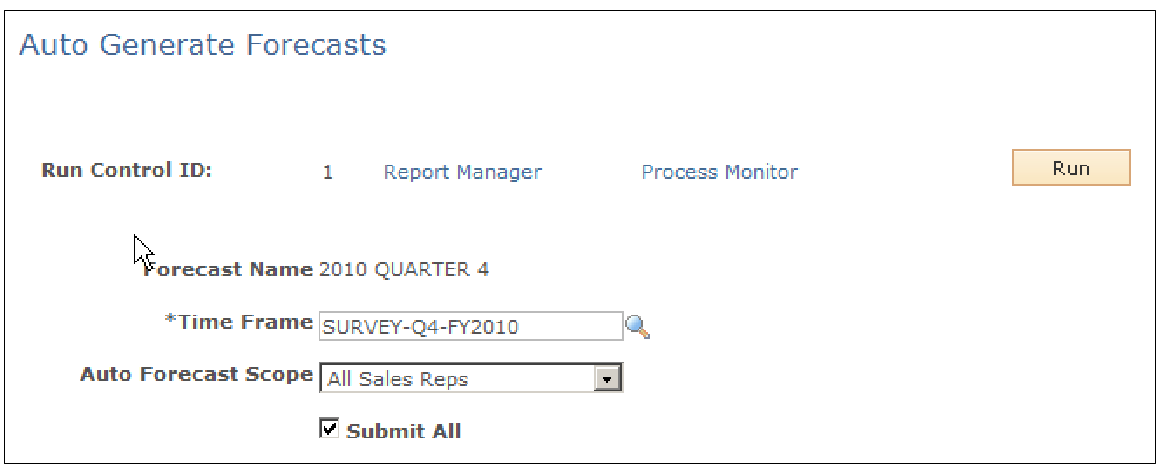
Use the Auto Generate Forecasts page (RSF_FCAST_RUN) to run the Auto Generate Forecast Application Engine process (RSF_FCST) to generate revenue or shadow forecasts for direct reports or for all people who are visible to you on the territory tree.

Navigation

- Set Up CRM > Product Related > Sales > Forecast > Auto Generate Revenue Forecast
- Set Up CRM > Product Related > Sales > Forecast > Auto Generate Shadow Forecast

Image: Auto Generate Forecasts page

This example illustrates the fields and controls on the Auto Generate Forecasts page.



Forecast Name

Enter the forecast to generate. You define forecasts on the Forecast Names setup page.

See Forecast Name Page.

Time Frame

Enter the time frame from which to pull data for forecasting. Define forecast time frames on the Time Frames page.

	See "Defining Holiday Schedules, Time Frames, and Sales Quota Rollups" (PeopleSoft CRM 9.2: Application Fundamentals).
Auto Forecast Scope	Select the data to forecast. Values are *My Sales Reps* (my sales representatives) and *All Sales Reps* (all sales representatives). Typically, sales managers can select *My Sales Reps* to automatically generate forecasts for sales representatives for whom they have visibility. However, only sales or forecast administrators can select *All Sales Reps* to automatically generate forecasts for the entire sales organization.
Submit All	Select to submit all of the automatically generated forecasts to manager visibility, in which case the sales representative cannot modify the forecasts. When the check box is deselected, the forecasts remain unsubmitted and available for editing, adjusting, and reforecasting.

After running the autogenerate process, select the autogenerated forecasts on the Forecast page in the Search Rollup Forecasts component to review and adjust them. Autogenerated forecasts are useful for determining sales representatives' revenue activities at a given time. However, autogenerated forecasts might not represent a true picture of a reporting period unless you are sure that sales representatives updated their opportunities and revenue projections before you ran the process.

Note: You can also autogenerate forecasts from the Forecast page in the Search Rollup Forecasts component by clicking the Auto Forecast button there. When using the button on the Forecast page, the system lists the autogenerated forecasts on that page, where you can view and adjust them.

Managing Forecasts

This topic discusses how to:

- Select the forecast action.
- Roll up and analyze forecasts.
- Analyze forecast subtotals.
- View details of all forecasts.

Note: Usually, access to the Search Rollup Forecasts component is limited to managers. Depending on access profile limitations, you may not be able to view these menu options and page fields. The views available to a manager depend on the setting of the CORE_RSF_FCAST_SIMPLE functional option.

Pages Used to Manage Forecasts

Page Name	***Definition Name***	***Usage***
Forecast Page (Manager Review)	RSF_FCAST_REVIEW	Manage and review forecasts.
Forecast Page (Combined Forecasts)	RSF_FCAST_ALLS	Edit and review forecast details.
Forecast Page (Subtotals)	RSF_FCAST_SUMMARY	Analyze forecast subtotals.
Select Columns to Display Page	RSF_FCAST_FILTER	Select filters for data to display for the subtotals view.
Forecast Page	RSF_FCAST_CHART	Display summary data on a chart.

Related Links

Setting Up Sales Access Profiles
Setting Up Functional Options

Common Elements Used in Managing Forecasts

Forecast View Select a view for the page. Values are *Charts, Combined Forecasts, Interactive Reports, Manager Review,* and *Subtotals.*

View as Enter a sales user for the forecast view.

Forecast of Select either *Forecast* or *Shadow.*

View Currency Select the currency in which to express the forecast amounts. The default is the sales user's default currency.

Forecast Page (Manager Review)

Use the Forecast page (RSF_FCAST_REVIEW) to manage and review forecasts.

Navigation

Sales > Search Rollup Forecasts > Forecast

Select *Manager Review* as the forecast view.

Image: Forecast page displaying data in manager review (1 of 2)

This example illustrates the fields and controls on the Forecast page displaying data in manager review (1 of 2).

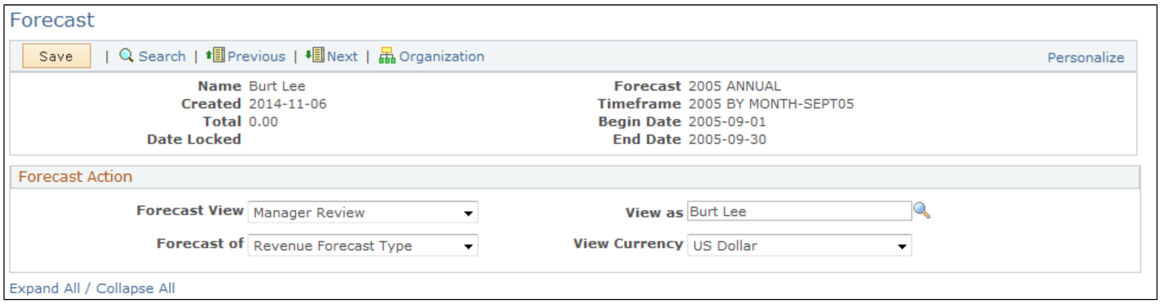
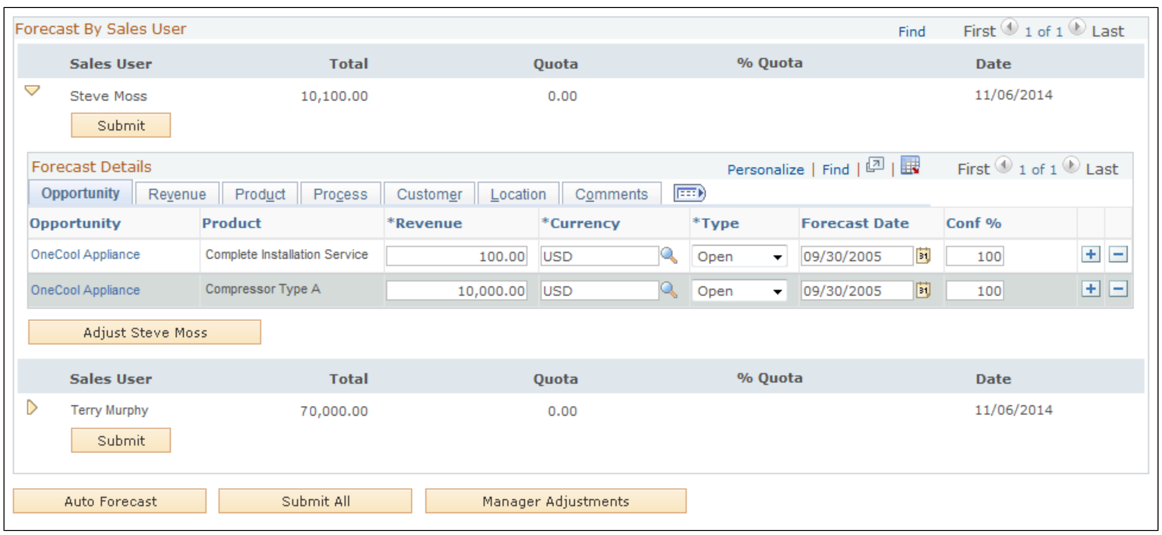


Image: Forecast page displaying data in manager review view (2 of 2)

This example illustrates the fields and controls on the Forecast page displaying data in manager review view (2 of 2).



Note: The system displays forecast amounts in the default currency of the sales user who accesses the forecast, not in the default currencies of the sales users whose forecasts are listed.

Expand All / Collapse All	Click this link to display forecast details and view or adjust data for all sales users who are listed on the page. If the details are displayed, click this link to hide forecast details for all sales users. **Note:** You can display or hide the details for an individual sales user by clicking the triangle next to the user.
Submit	Click this button for each forecast that you want to submit. After you have submitted the forecast for a sales user, the Submit button becomes unavailable and changes to Submitted. A submitted forecast cannot be edited.
Revenue	Enter the amount of revenue that is anticipated from the sale.

Currency	Enter the currency code.
Forecast of	Select a user-defined forecast type. See Forecast Type Page.
Forecast Date	Enter the estimated date that the sale will occur.
Conf % (confidence percentage)	Enter a whole number which specifies the probability that the forecast will became an actual sale.
Adjust <sales user>	Click this button to add a row and make adjustments to a particular sales user's forecast data if it has not previously been submitted.
Auto Forecast	Click to generate a forecast for each direct report who has opportunity activity but does not already have a forecast listed. You cannot automatically generate the same forecast for an individual more than once.
Submit All	Click to submit all forecasts. You cannot edit forecasts after they have been submitted.
Manager Adjustments	Click this button to add a row and make adjustments to the overall forecast total. The system inserts manager adjustments under the manager's name.

Forecast Page (Subtotals)

Use the Forecast page (RSF_FCAST_SUMMARY) to analyze forecast subtotals.

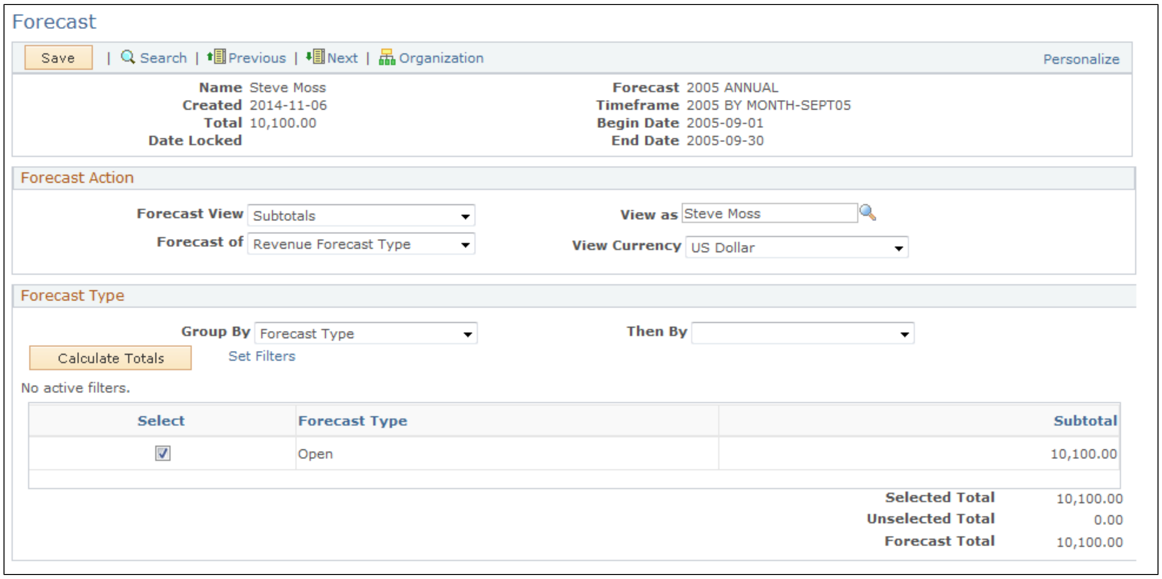
Navigation

Sales > Search Rollup Forecasts > Forecast

Select *Subtotals* as the forecast view.

Image: Forecast page displaying data in subtotals view

This example illustrates the fields and controls on the Forecast page displaying data in subtotals view.



Group By and **Then By**

You can use subtotals to generate and view a forecast's subsets. For example, suppose that the overall forecast is for November 2004 and you want to know the confidence levels that make up the forecast and you want to know those levels by region. In that case, you would select *Confidence %* in the Group By field and *Region* in the Then By field.

Note: You must enter a value in the Group By field to use subtotals.

Calculate Totals

After you have selected the subtotal groupings, click this button to calculate the subtotals for the groupings.

Set Filters

Click this link to access the Select Columns to Display page, where you can filter the data to be displayed.

Select

Select the check box next to each item that you want to group into a separate subtotal. The sum for the selected items appears as the selected total, and the sum of items that are not selected is the unselected total.

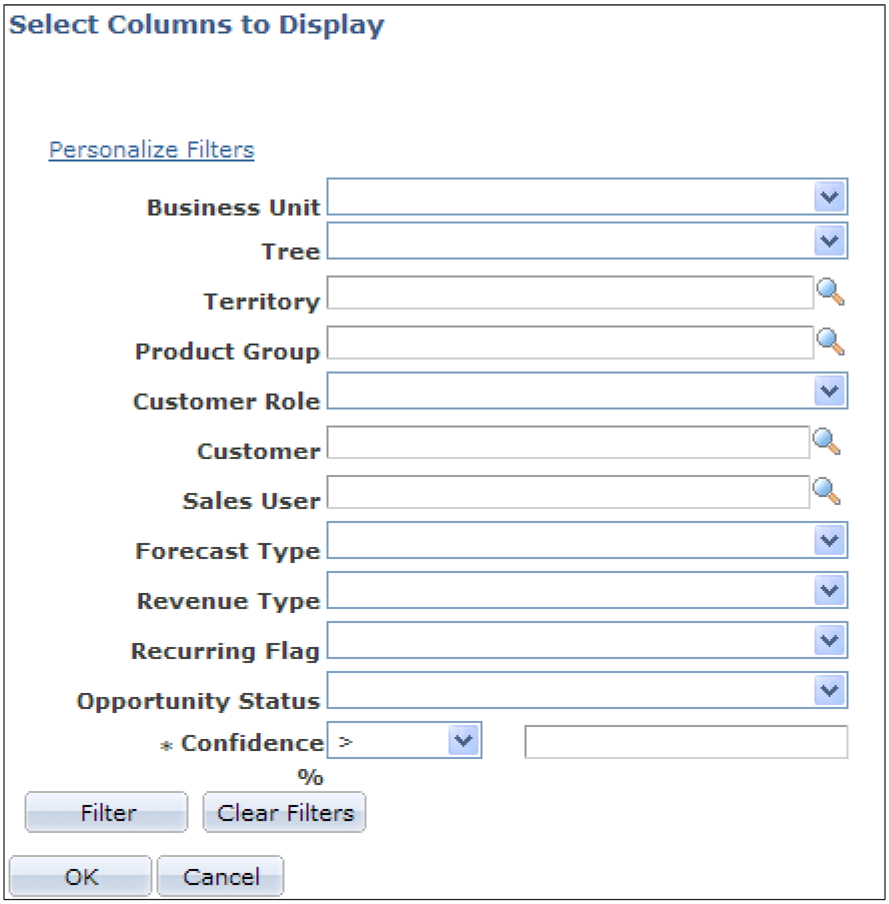
For example, suppose that 10 rows appear and you select this check box for the first, third, and fifth rows. The selected total is the sum of the first, third, and fifth rows, and the unselected total is the sum of the seven rows that you did not select.

Filtering Data

Access the Select Columns to Display page (Select the Set Filters link on the Forecast page.

Image: Select Columns to Display page

This example illustrates the fields and controls on the Select Columns to Display page.



After you select values to use as filters for the data displayed for the subtotals view, click the Filter button to filter the data. You can choose to use other available filters by clicking the Personalize Filters link.

Forecast Page (Combined Forecasts)

Use the Forecast page (RSF_FCAST_ALLS) to edit and review forecast details.

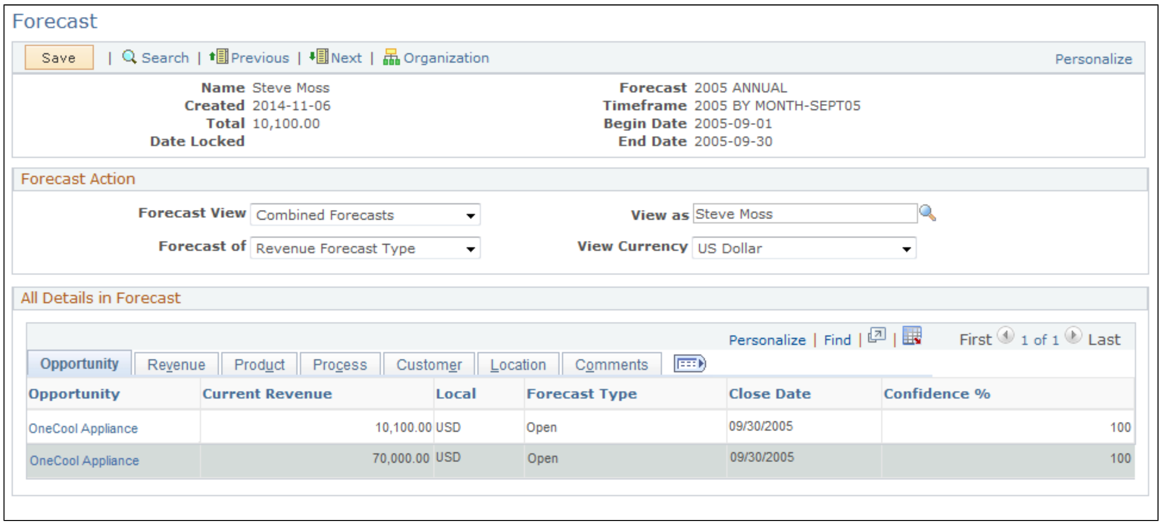
Navigation

Sales > Search Rollup Forecasts > Forecast

Select *Combined Forecasts* as the forecast view.

Image: Forecast page displaying data in combined forecasts view

This example illustrates the fields and controls on the Forecast page displaying data in combined forecasts view.



Select *Combined Forecasts* as the forecast view.

This view enables the manager to see information for all the sales users' opportunities. The manager can sort the data to view, for example, the opportunities with the highest revenue. Also, the manager can click the Download button to download the opportunities to a spreadsheet.

Inactivating and Locking Forecasts

This section discusses how to inactivate and lock sales forecasts.

Page Used to Inactivate and Lock Forecasts

Page Name	***Definition Name***	***Usage***
Maintain Forecast Page	RSF_FCAST_MAINT	Inactivate and lock sales forecasts.

Maintain Forecast Page

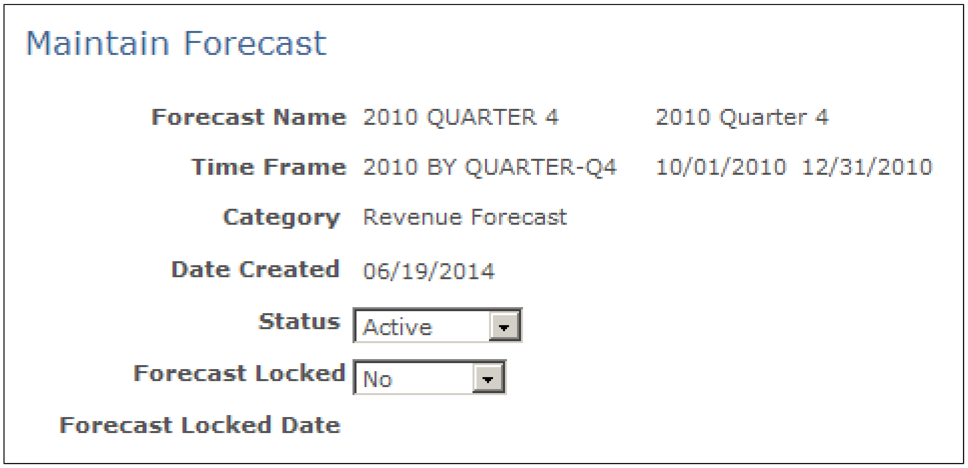
Use the Maintain Forecast page (RSF_FCAST_MAINT) to inactivate and lock sales forecasts.

Navigation

Set Up CRM > Product Related > Sales > Forecast > Lock Forecast > Maintain Forecast

Image: Maintain Forecast page

This example illustrates the fields and controls on the Maintain Forecast page.



Warning! You cannot unlock a forecast once it is locked.

Status

Select *Inactive* to inactivate the forecast. You can only access an inactive forecast on the Maintain Forecast page. You cannot view or modify an inactive forecast or include it in a forecast summary, rollup, or report.

You can reactivate a forecast at any time.

Forecast Locked

Select *Yes* to lock the forecast. On a locked forecast, you cannot:

- Edit
- Adjust rows
- Autoforecast
- Reforecast

A locked forecast remains visible unless you inactivate it. You cannot derive forecast summaries, rollups, reports, or other objects from locked forecasts.

Locked forecasts are permanently unavailable for editing. When you lock a forecast, you freeze the currency conversion rates for that forecast.

Archiving and Restoring Forecasts

This topic discusses how to archive and restore forecasts.

Pages Used to Archive and Restore Forecasts

Page Name	Definition Name	Usage
Archive Forecast Page	RSF_FCAST_ARCH	Archive a forecast.
Unarchive Forecast Page	RSF_FCAST_UNARCH	Restore an archived forecast.

Archive Forecast Page

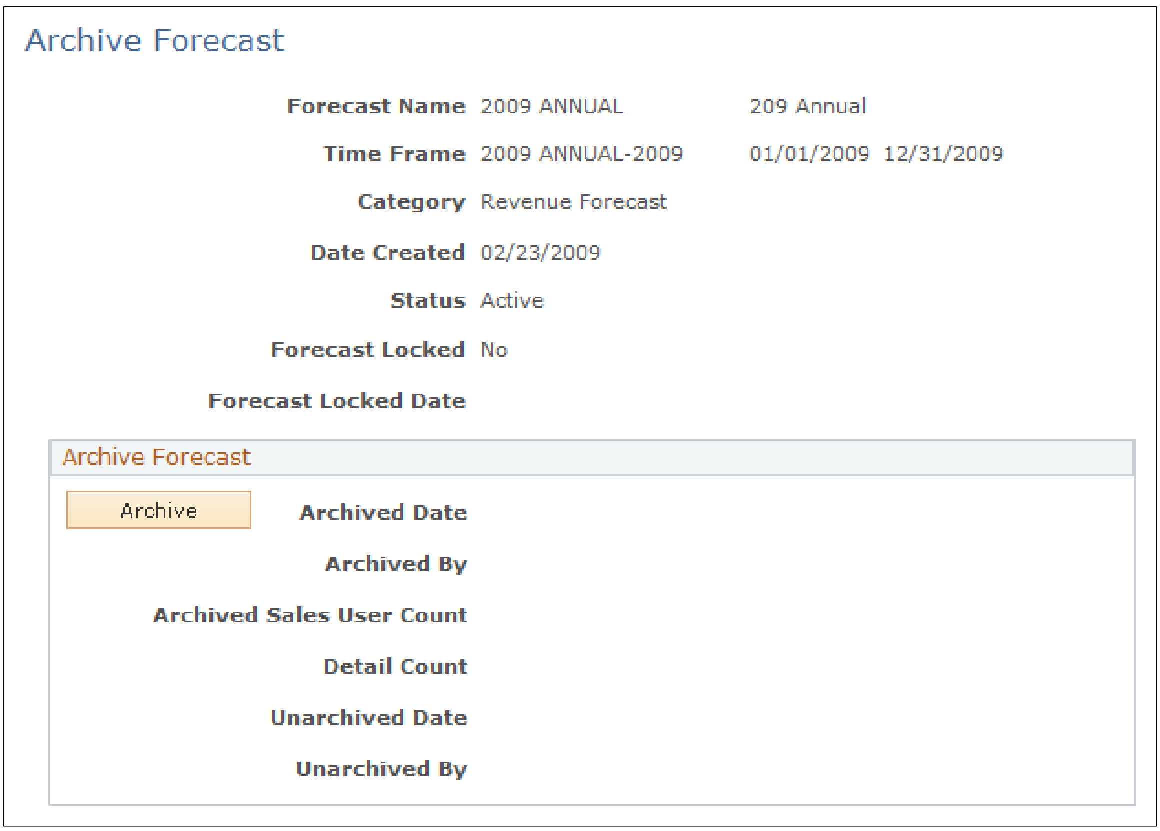
Use the Archive Forecast page (RSF_FCAST_ARCH) to archive a forecast.

Navigation

Set Up CRM > Product Related > Sales > Forecast > Archive Forecast > Archive Forecast

Image: Archive Forecast page

This example illustrates the fields and controls on the Archive Forecast page.



To increase system performance, you can periodically archive forecasts. Archiving maintains forecasts in duplicate sets of forecast data tables, enabling the system to access current forecasts faster than it can if all forecasts remain in the original table. You can restore a forecast after it is archived.

Archive	Click to archive the forecast. You can only access an archived forecast on the Unarchive Forecast page. You cannot view or modify an archived forecast or include it in a forecast summary, rollup, or report.

	When you archive a forecast, you move it from the original tables (the tables where you create and edit forecasts) to the archiving tables. The system is able to process unarchived forecasts faster from these tables. All archived forecasts have a status of *Inactive.*
Archived Date	Displays the date when you click Archive to archive the forecast.
Archived By	Displays the name of the logged-in user when you click Archive to archive the forecast.
Archived Sales User Count	Displays the total number of sales users that included in the sales forecast.
Archived Detail Count	Displays the total number of opportunity details in the sales forecast.

Chapter 23

Working with Customer Accounts

Understanding Customer Accounts

PeopleSoft Sales enables you to plan and manage customer accounts. Before you can use the account functionality, you must define a company or consumer business object.

Related Links

Understanding Sales Users

Flattening Customer Hierarchies

When you sell products and services to several subsidiaries or locations of a company, you might establish a different sales account and sales team for each. In PeopleSoft Customer Relationship Management (PeopleSoft CRM), each object that represents an entity of a customer company can have its own account information. The objects are related in a customer hierarchy that is often complex and time-consuming to navigate.

The Flatten Customer Hierarchy process (RB_CUST_FLAT) captures all of the parent and child customer relationships and consolidates the data in a table that is optimized for quick searches on the My Accounts page. The data that you can view on the My Accounts page and on the Account page in the Company component is determined by the flattener process as well as account access profiles and data-distribution rules for roles.

Page Used to Flatten Customer Hierarchies

Page Name	***Definition Name***	***Usage***
Customer Access Update Page	RB_CUST_FLAT_RUN	Run the Flatten Customer Hierarchy process to structure account data and provide easy access.

Managing Customer Accounts

This topic discusses how to:

- Access the My Accounts page.
- Assign representatives to accounts.

Pages Used to Manage Accounts

Page Name	***Definition Name***	***Usage***
My Accounts Page	RD_ACCOUNTS	View a list of customer accounts, and select accounts to view in detail.
Company - Account Team Page Person (Individual Consumer) - Account Team	RD_ACCOUNT_TEAM	Assign the account team for a customer.

My Accounts Page

Use the My Accounts page (RD_ACCOUNTS) to view a list of customer accounts, and select accounts to view in detail.

Navigation

My Accounts

Image: My Accounts page (1 of 3)

This example illustrates the fields and controls on the My Accounts page (1 of 3).

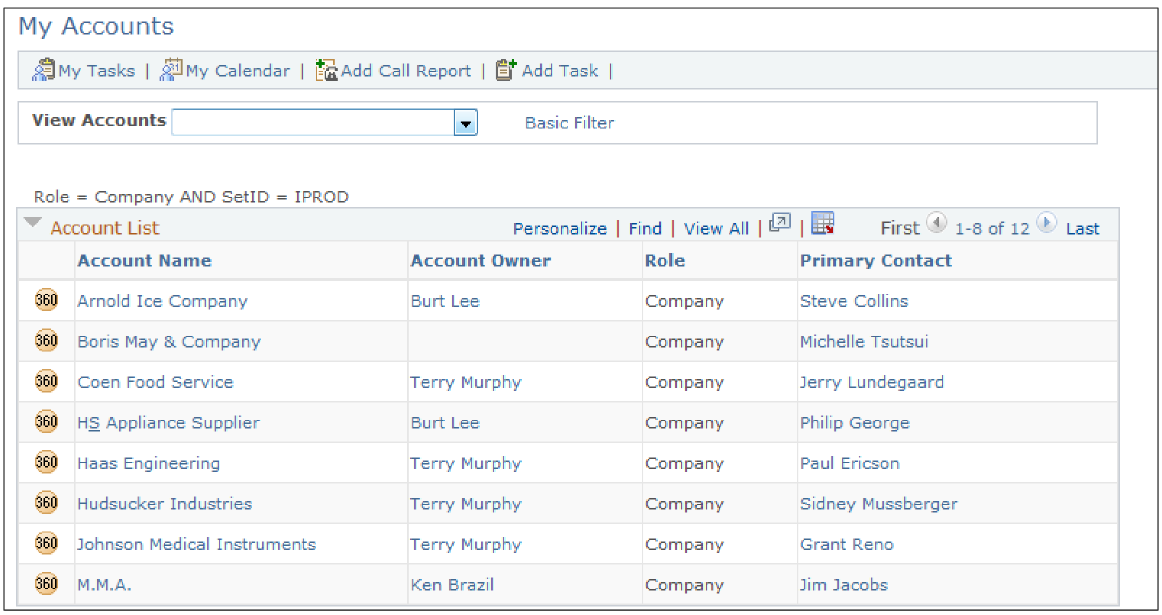


Image: My Accounts page (2 of 3)

This example illustrates the fields and controls on the My Accounts page (2 of 3).

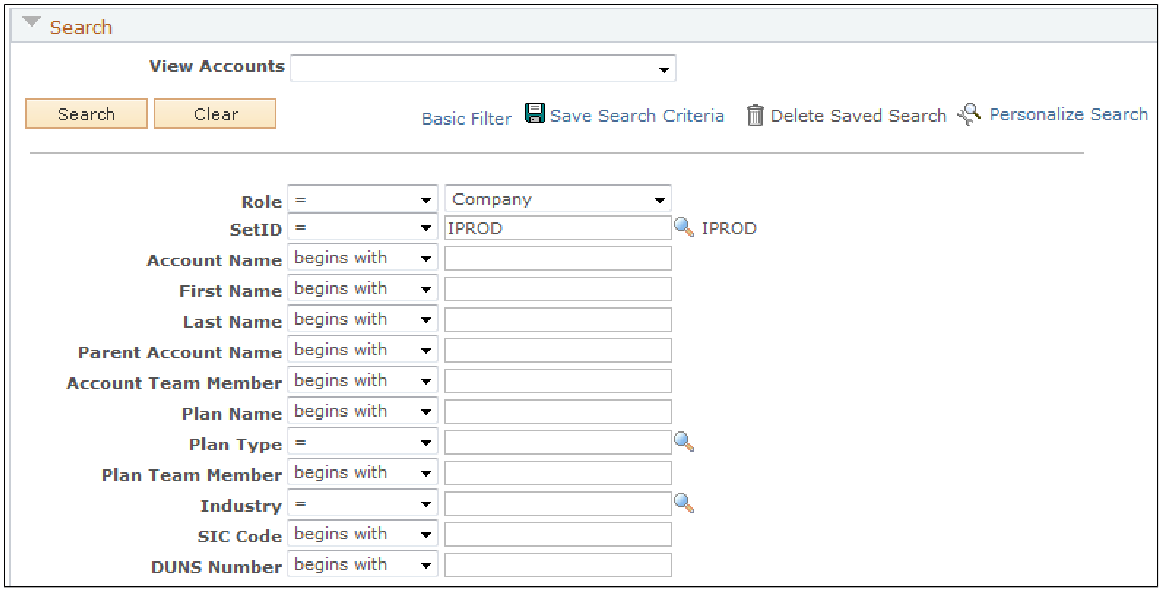
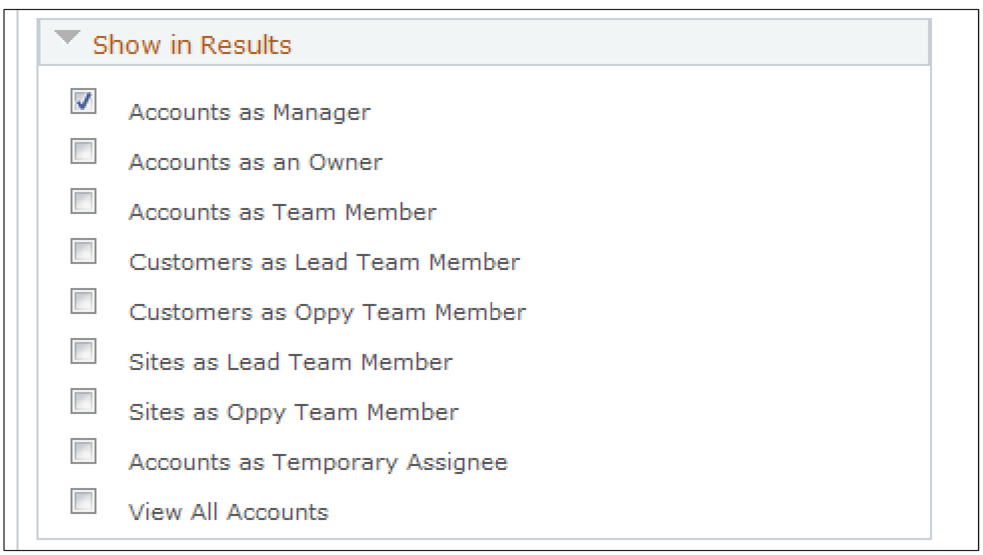


Image: My Accounts page (3 of 3)

This example illustrates the fields and controls on the My Accounts page (3 of 3).



An account is not always a customer. An account could be company, consumer, or site.

Basic Filter and **Advanced Filter**	Click the Basic Filter link to access the account list alphabetically. When you click this link, an index appears on the page, and you can click a letter to jump to the accounts that begin at that index. The default basic index is alphabetic. You can change this at system setup time. Click the Advanced Filter link to search for accounts using search criteria. When you click this link, the Filter and Show in Results page sections appear for you to specify search criteria. You have the option of naming and saving an advanced search.

	The Basic Filter and Advanced Filter links act as toggles; that is, either the basic or advanced filter criteria are accessible, but not both at the same time.
View Accounts	This field is not used.

Show in Results

Select the following check boxes to specify the accounts that the system displays when you perform a search.

Note: The check boxes available in the Show in Results section depend on how you set the configurable search options.

See "Configuring Searches" (PeopleSoft CRM 9.2: Automation and Configuration Tools).

Accounts as Manager	Select to display accounts for which you are the manager.
Accounts as an Owner	Select to display accounts for which you are the owner.
Accounts as Team Member	Select to display accounts for which you are a team member.
Customers as Lead Team Member	Select to display customer accounts that are associated with a lead on which you are a team member.
Customers as Oppy Team Member (customers as opportunity team member)	Select to display customer accounts that are associated with an opportunity on which you are a team member.
Sites as Lead Team Member	Select to display site accounts that are associated with a lead on which you are a team member.
Sites as Oppy Team Member (sites as opportunity team member)	Select to display site accounts that are associated with an opportunity on which you are a team member.
Accounts as Temporary Assignee	Select to display accounts on which you are a temporary assignee.
View All Accounts	Select to display all accounts.

Company - Account Team Page

Use the Company - Account Team page (RD_ACCOUNT_TEAM) to assign the account team for a customer.

Navigation

Select a customer on the My Accounts page.

Image: Company - Account Team page

This example illustrates the fields and controls on the Company - Account Team page.

Click Add Team Members to manually add sales representatives to the account team or Auto Assign Team Members to have the system automatically assign the team members using predefined assignment criteria.

You must have one of these roles to maintain account teams:

- Account Administrator
- Account Manager
- UPG_ALLPAGES

Related Links

Configuring Assignment Criteria

Chapter 24

Understanding Sales Interactive Reports

Understanding Interactive Reports

Interactive reports are a high-level implementation of the Analytic Calculation Environment (ACE). Interactive reports do not require an analytic logic server or a separate database to store data. These reports are dynamic, interactive analytic reports that enable you to view and organize data in a wide variety of ways for analysis of forecast activity.

Looking at reports from different perspectives affords an opportunity to gather valuable information about your business. You can save interactive reports, export them to Microsoft Excel for further analysis, and print them.

You run interactive reports for PeopleSoft Sales by using the Forecast component. They are in-context views that are driven directly from the particular forecast ID. These reports are multidimensional, displaying operational data such as revenue by region and sales representative. You can rearrange data elements on a report, filter the data in various ways, and use different dimensions to view data. You can also compare forecasts for the same time period. The changes that you make to the online report do not affect the PeopleSoft Customer Relationship Management database where the data is stored.

Interactive reports run in separate windows. User roles and access profiles control access to forecasts and, consequently, to interactive PeopleSoft Sales reports.

PeopleSoft Sales provides two types of interactive reports:

- Forecast summary reports, which enable you to view previously created forecasts organized by sales representative, territory, region, and business unit.
- Forecast comparison reports, which enable you to select and compare any two forecasts for the same time period, showing the variance and revenue line items that were added or omitted in the forecasts.

Launching and Working with Forecast Interactive Reports

This topic discusses how to:

- Generate interactive reports.
- Work with the Forecast Summary report.
- Work with the Forecast Comparison interactive report.

Pages Used to Launch and Work with Forecast Interactive Reports

Page Name	***Definition Name***	***Usage***
Forecast Page (Interactive Reports)	RSF_FCAST_SAI	Generate an interactive report summary of a revenue forecast or compare the current forecast to a previous forecast for the same time frame.
By Business Unit Page	RS_FCAST_BU	Work with a forecast summary report by business unit.
By Region Page	RS_FCAST_RG	Work with a forecast summary report by region
By Sales Rep Page	RS_FCAST_SR	Work with a forecast summary report by sales representative.
By Territory Page	RS_FCAST_TR	Work with a forecast summary report by territory.
Forecast Comparison Summary Page	RSF_FCAST_COMP	Work with the forecast comparison report.

Forecast Page (Interactive Reports)

Use the Forecast (Interactive Reports view) page (RSF_FCAST_SAI) to generate an interactive report summary of a revenue forecast or compare the current forecast to a previous forecast for the same time frame.

Navigation

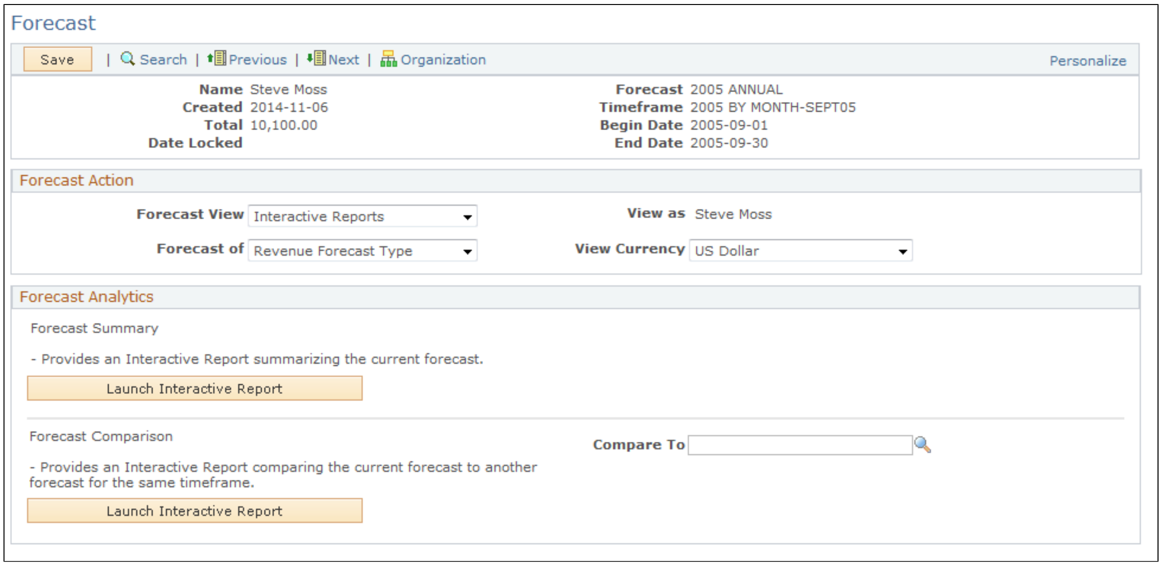
Sales > Search Rollup Forecasts

Select *Interactive Reports* as the forecast view.

Select a Forecast of value.

Image: Forecast page (Interactive Reports view)

This example illustrates the fields and controls on the Forecast page (Interactive Reports view).



Forecast of	Select *Revenue* or *Shadow.*

Note: You can use interactive reports only if the functional option CORE_RSF_FCAST_SIMPLE is set to full functionality.

See Setting Up Functional Options.

Forecast Summary Page

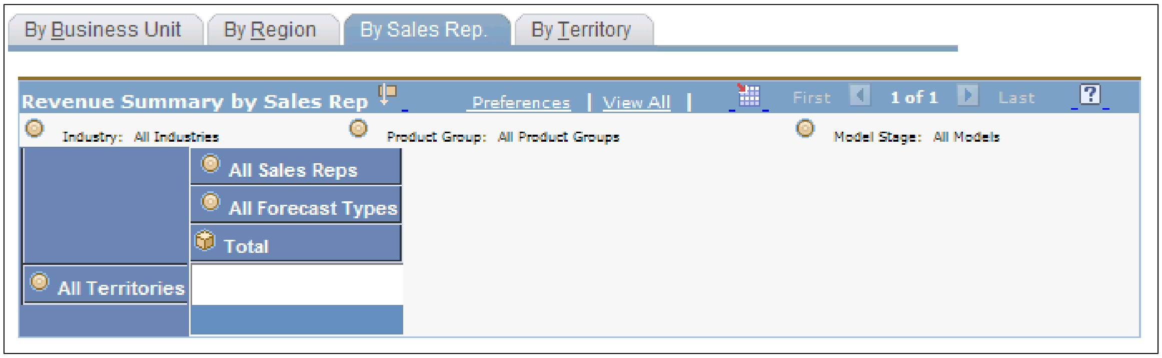
Use the Forecast Summary page (RS_FCAST_BU, RS_FCAST_RG, RS_FCAST_SR, and RS_FCAST_TR) to work with a forecast summary report by business unit, region, sales representative and territory.

Navigation

Click the Launch Interactive Report button in the Forecast Summary group box on the Forecast (Interactive Reports view) page.

Image: Forecast Summary - By Sales Rep. page

This example illustrates the fields and controls on the Forecast Summary - By Sales Rep. page.



Select a dimension to view and analyze the forecast data from different perspectives. Within each dimension, you can organize the data by industry, model stage, or product group and drill down on various dimensions.

Industry and **Product Group**	The options for each of these fields are based on the industries and product groups.
Model Stage	Select the stage in the sales process for which you want to view data.

Forecast Comparison Summary Page

Use the Forecast Comparison page (RSF_FCAST_COMP) to work with the forecast comparison report.

Navigation

Click the Launch Interactive Report button in the Forecast Comparison group box on the Forecast (Interactive Reports view) page.

This summary compares the current forecast for a time frame with an earlier forecast for the same time frame.

Use these dimensions to rearrange the forecast comparison and analyze it from different perspectives:

Show Deals	Select the data to show in the comparison. Values are *All Deals, Only revenue declines, Only revenue increases, Only fallout* and *Only new revenue.*
Product Group	Select from product groups associated with the opportunities in the particular forecast.

Chapter 25

PeopleSoft Sales Reports

PeopleSoft CRM Sales Reports: A to Z

The table in this topic lists the PeopleSoft CRM Sales reports, sorted by report ID.

For more information about running these reports, refer to:

- The corresponding topic in this product documentation.
- *PeopleTools: Process Scheduler*
- *PeopleTools: BI Publisher for PeopleSoft*.
- *PeopleTools: SQR Language Reference for PeopleSoft*

For samples of these reports, see the Report Samples that are published with this online documentation.

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
RSFC1000 Task Summary Report	This report lists information about a sales representative's tasks on leads and opportunities, including task start date, end date, customer, and status.	Sales > Reports > Task Summary > Task Summary Report	RUN_RSFC1000
RSFC1002 Customer Revenue Ranking By Product Group	This report lists customers by revenue generated and product group. It includes customer name, revenue, percentage, total by product group, and grand total.	Sales > Reports > Customer Rev Rank > Customer Revenue Ranking By Product Group	RUN_RSFC1002
RSFC1003 Forecast By Product Group	This report lists forecast information by product group.	Sales > Reports > Forecast by Product Group > Forecast By Product Group	RUN_RSFC1003
RSFC1004 Forecast By Sales User	This report lists information about the activities of sales users.	Sales > Reports > Forecast by Sales Rep > Forecast by Sales User	RUN_RSFC1004
RSFC1007 Product Group Review Revenue Analysis	This report lists information about revenue, sorted by product group, including forecast name and type, sales model and stage, and total by product group.	Sales > Reports > Product Group Revenue > Product Group Review Revenue Analysis	RUN_RSFC1007

Report ID and Report Name	***Description***	***Navigation***	***Run Control Page***
RSFC1010 Customer Revenue Ranking By Industry	This report lists information about generated revenue, sorted by industry.	Sales > Reports > Rank By Industry > Customer Revenue Ranking By Industry	RUN_RSFC1010
RSFC1011 Customer Revenue Ranking By Region	This report lists customer information, sorted by revenue.	Sales > Reports > Rank By Region > Customer Revenue Ranking By Region	RUN_RSFC1011
RSFC1013 Products for Open Opportunities	This report lists information about product lines and products, including associated opportunity name, quantity, unit of measure, and price.	Sales > Reports > Products Open Opportunity > Products for Open Opportunities	RUN_RSFC1013

