Oracle
Sales Cloud
Using Sales for High Tech and Manufacturing

Release 12
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Preface

This preface introduces information sources that can help you use the application.

Oracle Applications Help

Use the help icon 🔄 to access Oracle Applications Help in the application. If you don’t see any help icons on your page, click the Show Help icon 🔄 in the global header. Not all pages have help icons. You can also access Oracle Applications Help at https://fusionhelp.oracle.com.

Using Applications Help

Watch: This video tutorial shows you how to find help and use help features.

Additional Resources

- **Community**: Use Oracle Applications Customer Connect to get information from experts at Oracle, the partner community, and other users.

- **Guides and Videos**: Go to the Oracle Help Center to find guides and videos.

- **Training**: Take courses on Oracle Cloud from Oracle University.

Documentation Accessibility

For information about Oracle's commitment to accessibility, see the Oracle Accessibility Program.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com.
# About This Guide

## Audience and Scope

This guide provides information on how sales representatives and their managers can use the High Tech and Manufacturing industry solution.

This guide describes the business flows and functionality in the channel sales execution and direct sales execution areas and how you can perform your day-to-day operations in these areas.

## Related Guides

You can refer to the following related guides to understand more about the business flows and functionality covered in this guide.

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<th>Description</th>
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<tr>
<td>Oracle Sales Cloud Using Sales</td>
<td>Describes user tasks to help sales managers, salespeople, and other sales end users perform day-to-day business tasks.</td>
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## Related Topics

- Oracle Help Center
Chapter 2
Overview

High Tech and Manufacturing: Overview

Oracle Sales Cloud for High Tech and Manufacturing provides end to end solutions to automate identifying, nurturing, and tracking partners and channel organizations to align their businesses and close deals successfully.

Partner Relationship Management is used to analyze your partners, optimize resources and financial investments.

Channel account managers can sign up new partners, provide partners with portal access, manage partner teams, and manage partner program enrollments. Channel account managers can also use Oracle Social Network to engage partners in conversations related to key accounts, contacts, opportunities, and activities.

The partner portal offers lead to quote management, business planning, and social collaboration. Partner salespeople can use the partner portal to qualify leads and register opportunities with their channel organization.
The following figure illustrates channel sales execution:

High tech and manufacturing business summaries can be summarized as follows:

- **Channel sales execution:**
  - Channel account managers can assign leads to partners.
  - Partners can qualify leads and register the leads as deals.
  - Channel account managers can review registered deals and decide whether deals have the potential to be converted to opportunities.

- **Sales execution:**
  - Sales teams can use account plans to start and manage the account planning process for customer accounts.
  - Sales teams can create and use opportunities to anticipate and monitor prospect requirements.
  - Sales teams can use various or different sales methods to track the progress of opportunities at each sales stage.
### 3 Channel Sales Execution

#### Overview

The channel sales execution chapter covers:

- How the channel account manager can assign leads to partners.
- How a partner can qualify a lead and then register it as a deal.
- How the channel account manager can accept a deal and automatically convert it into an opportunity.

This chapter also provides an example of how a lead can be converted to an opportunity.

#### Assigning Leads to Partners

Channel account managers can use Oracle Sales Cloud lead assignment capabilities to route leads to the best partner and view leads which have not been assigned.

As a channel account manager, you can:

- Route leads to the best partner.
- View leads assigned to the partners.
- Reassign leads from one partner to another.

Channel account managers can also see the leads assigned to different partners in their territories. You can include the partner information in the lead.

The partners can choose to accept or decline a lead assigned to them. They can use the partner portal to qualify a lead and register it as a deal with the channel account manager.

**Related Topics**
- Managing Partner Leads: Overview

#### Registering Deals

Deal registration is the process partners use to request exclusive rights to a deal from their brand owner or channel organization.

Deal registration provides partners with the means to inform the brand owner or channel organization about a deal. Partners who are first to register a deal, receive priority if their deal registration is approved.

Oracle Sales Cloud for High Tech and Manufacturing helps reduce the risk of multiple partners pursuing the same client. It also helps you minimize the risk of your internal channel sales organization competing with a partner for the same opportunity.
Channel account managers can:

- Approve or decline registered deals.
- Convert approved deals to opportunities.
- Use Oracle Social Network to engage partners in conversations related to key accounts, contacts, opportunities, and activities.

*Related Topics*

- Deal Registrations: Overview

### Converting Deal to Opportunity

The channel account managers can convert a deal to an opportunity once they have approved the deal registration sent by a partner for approval.

A channel account manager can reject or return deal registration requests to their partners, asking for additional information or justification. Channel account managers can view requests made by their partners to help move the deal forward, view assessments done by the partners, provide a quote to the partners, and monitor overall progress of partner opportunities. After a deal registration is approved, an opportunity is automatically created to track the deal as it progresses through the pipeline.

*Related Topics*

- Managing Partner Opportunities: Overview

### Channel Sales Execution: Example

A lead can be converted to an opportunity through deal registration. This example illustrates how you can create a lead and convert into an opportunity.

Ellis Gibson is a channel account manager at Vision Corporation and Robin Marlow is a sales representative from a partner organization, Tall Manufacturing. Ellis Gibson creates and assigns a lead named Infusion to Tall Manufacturing. Robin Marlow receives the lead as he is the primary contact from Tall Manufacturing. Robin Marlow qualifies the lead and submits a deal registration to Ellis Gibson for approval. Ellis Gibson verifies the details provided by Robin Marlow on the deal and approves it. Ellis Gibson can create a quote and add a proposal to the Infusion opportunity.

### Creating a Lead

Ellis Gibson must perform the following steps to create a lead named Infusion:

1. Sign in to Oracle Sales Cloud as channel account manager.
2. Click Sales on the springboard.
3. Click Leads.

A dialog box opens displaying all your open leads sorted by age.
4. Click **Create Lead**.
   
   The Create Lead page opens. Name the lead as Infusion and fill in the additional details of the lead.

5. Click **Save and Continue**.
   
   The Summary tab of the Edit Lead page opens.

6. Fill in additional details for the lead like partner information.

7. Click **Save and Close**.
   
   A lead named Infusion has been created by Ellis Gibson. He can now assign the lead to Tall Manufacturing.

### Assigning a Lead to a Partner

Ellis Gibson must perform the steps to assign the lead named Infusion to Tall Manufacturing:

1. Sign in to Oracle Sales Cloud as channel account manager.
2. Click **Sales** on the springboard.
3. Click **Leads**.

   A dialog box opens displaying all your open leads sorted by age.

4. Select the lead named **Infusion**.
5. Click **Actions** and select **Assign Partner**.
6. Assign the partner company by using the search option on the Select: Partner page.
7. Click **OK**.

   The lead has been assigned to Tall Manufacturing. Robin Marlow, the primary contact from Tall Manufacturing receives the lead. He can accept the lead named Infusion and then submit the lead for deal registration.

### Registering a Deal

Robin Marlow must perform the following steps to submit the lead named Infusion for deal registration:

1. Sign in to Oracle Sales Cloud as partner sales representative.
2. Click **Leads** on the springboard.
3. Select the type of lead you want to view from the **List** drop-down list.
4. Select the lead named **Infusion**.

   The Summary tab of the Lead page opens.

5. Click **Accept** after viewing the details of the lead.

   **Note:** The Accept option is only available for the partner sales representative who the lead has been assigned to.

6. Click Qualification tab.
7. Answer the questions given on the page to qualify the lead and click **Save**.
8. Click Summary tab.
9. Select **Actions** and select **Register Deal**.

   Infusion is registered. You can navigate to the Deal Registration tab to view key details about the registered deal.
10. Click the registration number of a deal you want to edit. Summary tab of the Edit Deal Registration page opens.
11. Fill in the additional details for the deal.
12. Click **Actions** - **Submit for Approval**.
13. Click **Save and Close**.

Infusion has to be approved by Ellis Gibson. A new opportunity named Infusion is created once the deal is registered.

### Converting a Deal to an Opportunity

Ellis Gibson must perform the following tasks to approve the Infusion deal registration and create an opportunity:

1. Sign in to Oracle Sales Cloud as channel account manager.
2. Click **Sales** on the springboard.
3. Click **Deal Registration**.
   - A dialog box opens displaying all the registered deals by their status.
4. Click the registration number of Infusion.
5. Click **Actions** and select **Approve**.
6. Click **Save and Close**.

An opportunity named Infusion has automatically been created.

### Creating Quotes and Adding Proposals to an Opportunity

Ellis Gibson must perform the following tasks to create quotas and add proposals to an opportunity:

1. Sign in to Oracle Sales Cloud as channel account manager and ensure that you also have access to CPQ Cloud (Configure, Price, and Quote Cloud).
2. Click **Sales** on the springboard.
3. Click **Opportunity**.
   - A dialogue box opens displaying a list of opportunities.
4. Click Infusion.
5. On the Quotes and Orders tab, click **Create Quote**.
   - The Transaction Details tab of the Transaction page opens.
6. Click **Add Line Item** and search for the product you want to create a quote for on the Part Search option.
7. Select the product from the search results and click **Add to Transaction**.
   - The product details of the selected item are added to the Transaction Details tab of the Transaction page opens.
8. Fill in the additional details for the product and click **Save**.
9. Click **Generate Proposal**.
   - The summary of the Proposal opens.
10. Click **Save to Quote**.
    - The proposal is attached to the quote and the Transaction Details on the Transaction page opens.
11. Click **Update Opportunity**.
12. Click **Return to Sales Cloud - Save and Close**.

A quote has been created and a proposal has been added to the Infusion opportunity. The partner sales representative can share these quotes and proposals with the end customer.
4 Sales Execution

Overview

The sales execution chapter covers:

- How a sales representative can plan sales initiatives for different accounts and track after sales service of an account.
- How a sales team can anticipate the requirement of a prospective customer and track the activities associated with the different sales stages of an opportunity.

This chapter also provides examples of how an account plan can be created. Also, how you can create an opportunity of type project and associate it to an opportunity of type bid to it.

- How an account plan can be created.
- How an opportunity of type project can be created and how to associate an opportunity of type bid to it.

Related Topics

- Selecting and Performing Store Visit Tasks in Oracle Sales Cloud for Consumer Goods Mobile

Managing Account Plans

Account planning entails creating a new strategic account plan for various accounts. An account plan helps you define sales initiatives and plan revenue targets for your sales team.

You can record or view information about the stakeholders, customer strategy drivers, industry drivers, recent mergers and acquisitions, and so on. Account planning provides an integrated solution that ties the goals with actuals and empowers your sales representatives to understand what is important to the customer and then to explain to a customer how their needs can be met.

This plan provides an overview of your accounts strengths, weaknesses, opportunities, and threats including the historical data of that account. This information enables you to position your solution effectively. You can use the details in the account plan to holistically review the opportunities, leads, contacts, and so on related to participating accounts. You can see who your contacts are, who the team members are in each account, and add or remove participating accounts.

Account plan helps the representative set the foundation for continued selling by allowing for follow-up tasks and appointments. It simplifies the gathering of data, goals and streamlines the follow-up process saving time for the sales managers and sales representatives alike so both can focus their time to sell more.

You can track the plan for individual businesses or corporations having multiple subsidiaries.
Creating Account Plans: Example

Sales teams must create account plans to define sales initiatives and plan revenue targets. Additional information can be included in account plans by creating notes.

The sales vice-president, the sales manager, and the sales representative can create account plans and add notes to it. The sales representative can only add notes to an already created account plan.

Creating Account Plans

To create account plan:

1. Sign in to Oracle Sales Cloud as sales manager.
2. Navigate to Account Plans.
3. Click Create.
   
   The create page opens.
4. Fill in required details like plan name, plan owner, plan status, plan end date, plan visits, and plan target amount to define the account plan.
5. Click Save and Close.

The account plan has been created.

Adding Note to Account Plan

To add note to an account plan:

1. Sign in to Oracle Sales Cloud as sales manager.
2. Click Account Plans on the springboard.
3. Click plan name to which you want to add a note.
   
   The account plan summary page opens.
4. Click Notes tab of the account plan summary page.
5. Click Create Note.
   
   The create note page opens. Fill in the required details to define the note.
6. Click Save and Close.

The note has been created and added to the account plan.

Managing Opportunities

Opportunities help the sales team to track and anticipate requirements of prospective customers. Use opportunities to track both direct and indirect sales activities.
Optionally, use Oracle Sales Cloud Partner Relationship Management (PRM) to manage channel sales. If you manage opportunities without PRM, the sales representatives must enter and track each opportunity manually.

You can create three types of opportunities:

- Standard
- Bid
- Project

Note: Each opportunity type has a different page layout. When you change the opportunity type anytime during its lifecycle, the page layout also changes.

Build opportunity hierarchies to track complex opportunities. The following table and figure explain the relationships allowed by default. You can customize these relationships based on your organizational requirements.

<table>
<thead>
<tr>
<th>Opportunity Type</th>
<th>Parent Opportunity</th>
<th>Child Opportunity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Standard</td>
<td>Standard</td>
<td>Standard</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bid</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Project</td>
</tr>
<tr>
<td>Bid</td>
<td>Standard</td>
<td>None</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bid</td>
</tr>
<tr>
<td>Project</td>
<td>Standard</td>
<td>Bid</td>
</tr>
</tbody>
</table>
Standard

Standard opportunities are the primary opportunity type and can be parents of any other opportunity type.

Bid

When multiple partners bid for a prospective customer, channel account managers can track each bid as a separate opportunity.

Some of the information you can track for bids is as follows:

- Can be categorized as budgetary or firm
- Bid process
- Strategic importance
- Partner information
- Associated project opportunity details

Project

Each project opportunity has a sub-opportunities subtab, which allows you to view, add, manage, and delete associated bid opportunities. The associated bid likely to win can be tracked.

Some of the information you can track for projects is as follows:

- Sales channel can be defined as direct or null
- Primary partner
- Awarded to bid
Working with Project and Bid Opportunities: Example

This example shows how project and bid opportunities can be used.

Joe Stevens is a channel account manager at Vision Corporation working with an extensive partner network. Joe carefully monitors his deal registrations and notices that several partners appear to be bidding on a single project. To track his forecast accurately he creates a project opportunity to aggregate the bids from partners. He wants to ensure he submits only one partner opportunity representing the project.

Creating a Project Opportunity

Project opportunity must be created using the following steps:

1. Sign in to Oracle Sales Cloud as channel account manager.
2. Click Sales on the springboard.
3. Click Opportunities.

   A dialog box opens displaying all your opportunities sorted by win percentage.
4. Click Create Opportunity.

   The create opportunity page opens.
5. Fill in the required details like name and close date of the project opportunity.
6. Click Save and Continue.

   The edit opportunity page opens.
7. Fill in the additional details for the project opportunity.

   You can provide additional project opportunity information like bid most likely to win, partner selected, bid selected, date selected, project duration days, and bid complexity.
8. Click Save and Close.

   A project opportunity has been created.

Adding a Bid Opportunity to a Project Opportunity

A bid can be added to a project opportunity using the following steps:

1. Sign in to Oracle Sales Cloud as channel account manager.
2. Click Sales on the springboard.
3. Click Opportunities.

   A dialog box opens displaying all your opportunities sorted by win percentage.
4. Select the project opportunity to which you want to add a bid.
5. Click Opportunities tab.
6. Click Add.
7. Select the bid opportunities you want to add.
8. Click Apply - Done.
9. Click Save and Close.

A bid has been added to a project type opportunity.

Working with Sales Method

You can use sales methods to employ the sales methodology that best aligns with an opportunity type. Sales method is an opportunity attribute that link sales strategy to sales execution. You can align your sales methods and sales stages to reflect your sales process. A sales method can include all activities associated with the different sales stages during the sales process, from qualifying, to negotiating, to closing. Selecting an appropriate sales method ensures that sales representatives are aware of the typical steps they are expected to complete at each stage of the opportunity life cycle.

Sales coach process definitions are predefined for bid and project opportunities. The application administrator must select one of the sales processes provided by Oracle Sales Cloud or define a sales process for each opportunity types.

Related Topics

- Sales Methods, Sales Stages, and Sales Coach: Overview
- Sales Methods and Sales Stages: How They Fit Together
- Sales Coach: Explained
5 Reporting and Analytics

Sales Infolets Page: Overview

Sales infolets can be used to review the performance of your team. The information provided by the infolets can be used to plan and analyze your sales activities.

You can click an infolet to drill down and view the detailed report attached to it. The infolets can also be disabled or enabled using the infolets repository.

Click these infolets to drill down and to view additional reports or navigate directly to the record detail. You can also enable or disable these infolets using the infolet repository, available on the right side of the sales infolets page. You can use the reports as provided or you can extend and modify them to meet your business requirements.

Sales Infolets

The following infolets are provided:

<table>
<thead>
<tr>
<th>Infolet</th>
<th>Roles</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Top Open Bids</td>
<td>Sales Representative</td>
<td>You can view the revenue potential by focusing on your top open bid opportunities. The infolet only provides the revenue potential of bids which have a win probability of seventy percent or higher. The detailed report contains:</td>
</tr>
<tr>
<td></td>
<td>Sales Manager</td>
<td>• Win percentage</td>
</tr>
<tr>
<td></td>
<td>Sales VP</td>
<td>• Name of the bid</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Account name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Primary contact</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Parent opportunity name</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Sales stage</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Amount</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Included in forecast</td>
</tr>
</tbody>
</table>

| Top Open Projects | Sales Representative | You can view the revenue potential by focusing on your top open project opportunities. The infolet only provides the revenue potential of projects which have a win probability of seventy percent or higher. The detailed report contains: |
|                   | Sales Manager        | • Win percentage                                                                             |
|                   | Sales VP             | • Name of the project                                                                        |

Note: You can only view the infolets which the administrator has added to your sales infolets page.
## Roles

<table>
<thead>
<tr>
<th>Infolet</th>
<th>Roles</th>
<th>Description</th>
</tr>
</thead>
</table>
|                               |                              | • Account name  
• Primary contact  
• Sales stage  
• Amount  
• Included in forecast  
• Bid likely to be selected  
• Associated child opportunities  
• Included in forecast child opportunities |
| Bids by Stage                 | Sales Representative         | You can review the revenue potential of open bids in their queue. Forecasted revenue of each bid is grouped as per the present stage of the bid                                                                         |
|                               | Sales Manager                |                                                                                               |
|                               | Sales VP                     |                                                                                               |
| Bid Values by Contract Award Date | Sales Representative       | You can view the revenue generated by successful bids in the current quarter. Generated revenue is grouped as per the month in which the contract was awarded.                                               |
|                               | Sales Manager                |                                                                                               |
|                               | Sales VP                     |                                                                                               |
| Sales Performance             | Channel Account Manager      | You can view how the sales is trending for the current quarter. A graph depicts the forecast, resource quota, closed revenue, and revenue gap.                                                                |
| Top Opportunities             | Channel Account Manager      | You can view a list of your top six opportunities based on revenue.                                                                               |
| Pipeline                      | Channel Account Manager      | You can view a graph of opportunities by sales stage. You can also drill down to view details like sales stage, count for opportunity, opportunity revenue, and opportunity ID for each opportunity. |

### Related Topics

- Sales Representative Infolet page: Explained
- Sales Manager Infolet Page: Explained
- Sales VP Infolet Page: Explained
- Channel Account Manager Infolet Page: Explained