Oracle
Sales Cloud
Using Leads

Release 12
This guide also applies to on-premises implementations
# Contents

## Preface

### 1 About This Guide

- **Audience and Scope**
- **Related Guides**

### 2 Getting Started

- **Using Oracle Sales Cloud: Overview**
- **Available User Interfaces**
- **Searching Oracle Sales Cloud: Explained**
- **Searching for Objects in Their Work Areas: Explained**

### 3 Process Leads

- **Lead Processing: Overview**
- **File-Based Data Import: How It Works**
- **Importing Leads Using File-Based Import: Explained**
- **Import Activity Source File Options: Explained**
- **Import Activity Import Options: Explained**
- **FAQs for Lead Import**
- **Lead Processing Activities: Explained**
- **Lead Scoring: Example**
- **Lead Ranking: Explained**
- **Lead Ranking Rule: Example**
- **Lead Status: How It Automatically Is Set**
- **Lead Assignment: How It Is Processed**
## Follow Up Leads

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead Management: Overview</td>
<td>35</td>
</tr>
<tr>
<td>How Lead Components Fit Together</td>
<td>35</td>
</tr>
<tr>
<td>Lead Actions: Explained</td>
<td>37</td>
</tr>
<tr>
<td>Lead Statuses: Explained</td>
<td>38</td>
</tr>
<tr>
<td>Creating Leads with New Contact and Account: Procedure</td>
<td>39</td>
</tr>
<tr>
<td>Converting Leads with New Contact and Account: Procedure</td>
<td>39</td>
</tr>
<tr>
<td>Lead Qualification: Explained</td>
<td>40</td>
</tr>
<tr>
<td>Qualifying Leads: Examples</td>
<td>41</td>
</tr>
<tr>
<td>Performing a Lead Qualification: Procedure</td>
<td>43</td>
</tr>
<tr>
<td>Performing Multiple Lead Qualifications: Explained</td>
<td>43</td>
</tr>
<tr>
<td>Applying Mass Update to Leads: Procedure</td>
<td>44</td>
</tr>
<tr>
<td>Lead Assessments: Explained</td>
<td>45</td>
</tr>
<tr>
<td>Converting Leads</td>
<td>46</td>
</tr>
<tr>
<td>Differences Between Response, Lead, and Opportunity: Explained</td>
<td>46</td>
</tr>
<tr>
<td>Creating a Copy Map: Procedure</td>
<td>47</td>
</tr>
<tr>
<td>Modifying the Lead to Opportunity Copy Map: Worked Example</td>
<td>49</td>
</tr>
<tr>
<td>Attribute Mapping When Converting Leads to Opportunities: Explained</td>
<td>51</td>
</tr>
<tr>
<td>Sales Users Access to Leads: Explained</td>
<td>54</td>
</tr>
<tr>
<td>Lead Ownership and Sales Team Resources: Explained</td>
<td>56</td>
</tr>
<tr>
<td>Sales Lead Team Examples</td>
<td>57</td>
</tr>
<tr>
<td>FAQs for Follow Up Leads</td>
<td>58</td>
</tr>
</tbody>
</table>
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.
1 About This Guide

Audience and Scope

This guide contains information to help sales managers, salespeople, and other sales users create leads and manage the various aspects of leads.

This guide provides information about:

- How to import lead data from an external data source into Oracle Sales Cloud using the File-Based Data Import feature.
- How to set lead rank, score, and lead qualification status for a selected batch of leads using the lead processing activity.
- How leads get prioritized for sales engagement through a scoring and ranking process.
- How leads are distributed to appropriate sales resources for further lead qualification, follow-up, and conversion.

Related Guides

You can refer to the following related guides to understand more about the user tasks covered in this guide.

<table>
<thead>
<tr>
<th>Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Applications Cloud Using Common Features</td>
<td>Describes user tasks and features that are common across Oracle Applications Cloud.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Creating and Administering Analytics</td>
<td>Provides advanced instruction on creating and customizing Sales Cloud analytics and reports.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Campaigns</td>
<td>Describes the user tasks for creating campaigns and managing the various aspects of campaigns.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Customer Contracts</td>
<td>Describes user tasks for customer contracts including creating customer contracts, authoring of contract terms, and maintenance and configuration of contracts.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Customer Data Management</td>
<td>Describes user tasks to manage customer information and customer data quality.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Incentive Compensation</td>
<td>Describes the user tasks for the incentive compensation business process, from creating and managing compensation plans to reviewing and monitoring incentive plans and performance data.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Using Sales</td>
<td>Describes the tasks that help sales managers, salespeople, and other sales end users to perform day-to-day business tasks.</td>
</tr>
<tr>
<td>Oracle Engagement Cloud Using Service Request Management</td>
<td>Contains information to help service managers, service personnel, and other service end users to create and manage service requests.</td>
</tr>
</tbody>
</table>
Related Topics

- Oracle Help Center
2 Getting Started

Using Oracle Sales Cloud: Overview

Oracle Sales Cloud lets sales representatives and other sales personnel quickly and easily perform core sales tasks on a variety of interfaces, including computers, laptops, tablets, and smartphones. The intuitive design of the user interface (UI) reduces the need for application training and promotes faster adoption by sales personnel. Analytics built in to the UI provide information when and where it’s needed. The following are some of the key capabilities of Oracle Sales Cloud:

- Manage customers and contacts.
- Log sales calls.
- Manage calendars and activities.
- Create and update leads.
- Create, monitor, and update opportunities.
- Access the product catalog and add products to opportunities and leads.
- Create and update territories and quotas.
- Manage sales forecasts.
- Participate in social conversations.
- Upload and access content in the Lightbox content library.
- Manage partner information.
- Use mobile applications to manage customer information, leads, and opportunities.
- View key metrics, such as pipeline revenue and quota performance, at a glance.

Understanding the Sales Cloud UI and Features

The following is an introduction to the UI and a brief discussion of some of the features available in Sales Cloud:

- Home page:
  - The home page offers a central location from which you can navigate to complete important tasks, like updating contact, account, lead, or opportunity information.
  - The home page contains a springboard and a panel that, based on setup, shows either company announcements or social networking conversations.

- Springboard:
  - The springboard is the area on the simplified UI home page, and above all simplified pages, that contains a set of functional area icons.
  - The springboard provides icons that you can use to open pages and applications.

- Sales analytics:
  - Use the dashboard and infolets page to view and drill into supplied infolets that contain key metrics, such as Top Open Deals or Stalled Deals. If you have access to infolets, you see a series of pagination controls (clickable dots) near the top of the page.
• Gain insight into your performance against your quota.
• View your pipeline, including total opportunity revenue, revenue per sales stage, and opportunity count in the pipeline.
• View past and upcoming activities.
• See separate views of the dashboard as salesperson or sales manager.

For more information on analytics, see the Oracle Sales Cloud - Using Analytics and Reports guide.

• Leads:
  • View and edit lead information, including products, budget, and deal size.
  • Create, qualify, and convert leads.

• Opportunities:
  • Create and manage opportunity information, such as owner, product revenue, win probability, sales stage, and more.
  • Manage all the information related to your opportunities like relationships, contacts, appointments, and sales team members from one, convenient portal.

• Sales forecasting:
  • View forecast, pipeline, and won amounts for current, past, and upcoming quarters.
  • See forecast trends over time.

• Accounts and contacts:
  • Create and manage accounts, contacts, and households for B2B selling.
  • View and manage associated items, such as interactions, leads, opportunities, and appointments.

• Partner management:
  • Manage partners, including their leads and opportunities.
  • Review notification requests and manage activities and notes related to partners.
  • Manage partner enrollments.

• Scheduling and calendars:
  • Create and manage appointments and tasks, and associate them with the contacts, leads, and opportunities you’re working on.
  • Manage team calendars and access autogenerated tasks.

• Social:
  • Participate in conversations with other sales team members.
  • Associate conversations with sales accounts, contacts, leads, and opportunities.

• Configuration by administrator:
  • Set any one of several different themes to change look and feel.
  • Change icon style, button shape, and logo to personalize the user experience.
  • Customize news and announcements on the home page.
For more information on UI navigation, see the topic, Navigating in the Application: Explained, available in the online help. Administrators should refer to the topic, Understanding Default Navigation Components.

Extending and Customizing the UI

After your services are up and running, several customization options are available for you to tailor the UI to company business needs, such as:

- Specify customization layers, for example, site or role
- Configure the dashboard by adding or removing infolets
- Extend table and form regions
- Reorder subtabs
- Show or hide fields
- Add and remove custom fields
- Change field labels
- Make fields read-only

Note that some of these extensions are done using Application Composer and some are done with Page Composer. For more information on extending the UI, see the Oracle Sales Cloud - Customizing Sales guide.

Related Topics

- Navigating in the Application: Explained
- Oracle Sales Cloud Help Center
Available User Interfaces

Oracle Sales Cloud provides UIs that are optimized for different uses:

- The simplified UI provides the efficiency and speed sales personnel need to do their work.
• The desktop UI provides additional page real estate required for setup and administration tasks.

• The mobile UI is optimized for managing sales information on multiple mobile devices. You can use it to manage appointments, leads, accounts, contacts, and opportunities. It includes:
  
  o Location integration, so you can see where customers are located.
  
  o Integration with a calendar, e-mail, and a camera. You can automatically log e-mails and other interactions with customers, and add pictures of contacts to their profiles.
A disconnected mode that makes it possible for your sales organization to continue working even when disconnected from the network.
Searching Oracle Sales Cloud: Explained

There are two different ways of searching Oracle Sales Cloud:

- You can use the global search located at the top of the application page to search across objects in the application:

  ![Global Search](image)

- You can navigate to the work area of the object you are looking for and search for it there by name or using multiple search criteria.

  ![Opportunities Search](image)

This topic provides a brief overview of the two types of searches. Related topics provide tips for using them.

Global Search

Enter your search term in the global search box located at the top of each page to find all the records related to that search term. For example, entering the name of a contact as a search term retrieves not only the information about the contact herself, but also all of the opportunities, leads, and activities that mention that contact.

Global search makes it possible to search all the key fields in the following objects. Your application administrator determines which of these objects are available for search in your implementation.

- Accounts
- Activities
- Campaigns
- Contacts
- Forecasts
- Households
- Leads
- Opportunities
- Partners

Not all objects or fields are searchable. Global search does not permit searches of child objects, or through notes or presentations you have uploaded, for example. Attachment searches are restricted to the attachment file names. Nor can
you use global searches to find calculated values, such as the currency value of an opportunity or the due date of an activity. While the application administrator can make your custom objects searchable, you cannot search custom child objects. Custom objects have their own work areas. Custom child objects appear as tabs of other objects.

Global search depends on an indexing process to make new records available for search. Your application administrator schedules a separate process to periodically index each application object. The indexing processes are usually scheduled to run once a day in off-peak hours to minimize performance impact. Any new record you create is not available to search by you or by others until the indexing process has run.

Searching in the Work Areas

Use the search in the different work areas to quickly find a particular object you are looking for in one of three ways as highlighted in the following figure:

- By typing the object name in the Find box.
  
  As you type, the application matches the search term to the records you accessed, created, or updated recently and displays them in the Recent Items window.

- By selecting a list. A list displays records using search criteria you or an administrator saved previously.

- By clicking Show Advanced Search (the filter icon) and entering your search criteria in the Advanced Search panel.

Searching Using the Advanced Search Panel in Work Areas

When you click the Show Advanced Search icon (filter icon) in the work area landing pad, the application displays the Advanced Search panel showing the search criteria for the list displayed on the page. You can modify the existing search criteria for the list, add additional search terms, or select a different list (saved search) as the basis of your search.

*Note:* The Advanced Search panel uses the term Saved Search instead of List.
Clicking **Search** initiates the search. Clicking **Save** saves your changes or creates new list, as described in related topics.

**Finding the Most Recent Records Created in the Application**

Searches in Oracle Sales Cloud depend on two indexing processes that are set up by the application administrator to run periodically, one for the work area searches and another for the global search. Work area searches are indexed every five minutes, so use this type of search for finding the most up-to-date information. You will want to use the work area search to find the latest information about a customer appointment, for example. Oracle recommends global searches be indexed once every day, so use global searches for finding information across different objects.
Even though new records you create are unavailable for search until they indexed by each search, they are always available for you from the Recent Items list. As you enter a search term in either the global and work area searches, the application automatically displays a list of records you personally created, edited, or accessed in the last 30 days (or another interval configured by the administrator). Each search maintains its own list of Recent Items. When you use the global search, you do not see the recent items from the work areas and vice versa.

Searching for Objects in Their Work Areas: Explained

This topic describes how to search quickly for accounts, opportunities, leads, and other objects.

Use the following methods for searching:

- Start typing the object name and select the item from the list of recent items.
- Search for names using complete words or phrases.
- Search for partial words using the percentage sign (%) to stand for missing characters or words.
- Select a list, click the **Show Advanced Search** (the filter icon), and modify the search criteria.
- Search for the account itself first to find activities, leads and other objects related to an account.

Typing the Object Name and Reviewing the List of Recent Items

To search for an object by name, navigate to the object you want to search, click in the **Find** field, and start typing any one of the words in the name. Capitalization doesn’t matter.

As you type, the application matches your entry to the records you accessed, created, or updated recently and displays them in the Recent Items window. If you see what you are looking for, just select it.

Searching by Object Name Using Complete Words or Exact Phrases

If you don’t find what you are looking for among the Recent Items, then finish typing the word and click **Search** (the magnifying glass icon). The application displays a list of records with names that contain your search term, followed by records with related words, just in case you didn’t type the word correctly. For example, if you are searching for accounts using the word **Software**, as shown in the figure below, then the application first displays the account names that contain that...
word, such as Compucon Software and Forte Software Inc. (1), followed by names with similar spellings such as Softgear Inc. (2).

If you want to find the exact name you are searching for, then put quotation marks around your search terms. For example, "Forte Software Inc", returns just that one record.

Searching for Partial Words in a Name
You can also search for partial words.

- Put a percent (%) sign after two or more letters, and you get all the names with words that start with those letters. 
  For example, searching on pin%, returns Pinnacle Technologies and All Pines Furniture.
- Put the percent sign at the front of the term, and you get records that end with your term. For example, searching for %ard, returns The Board of Education and Edward Ward and Co.
- Put the percent sign at both ends, and you get all the customer names with words that include those letters.

\[ Note: \] You can use the percent (%) sign at the beginning of your search term only in the Find field on the main page of each object.

Using the percent (%) sign can slow your searches, so enter a whole word if you know it.
Searching Using Predefined Lists and Modifying the Search Criteria

Searching by name is not the only way to find what you need. You can search by selecting one of the lists you or an administrator has created from the List list and use the following procedure to modify the search terms.

1. Click **Show Advanced Search** (the filter icon highlighted in the following figure).

![Opportunities search form](image)

The Advanced Search window appears, showing the current search criteria for the list that is displayed on the page.
2. You can choose different search criteria by selecting a different list from the Saved Search list.

3. You can then modify the search by:
   - Changing the scope of the search by choosing a different record set.

   For example, selecting All records I can search from the Record Set list, searches all the records you can access. Selecting Records I own searches only the records where you are listed as the record owner. The available record sets vary by object.
Tip: To improve search performance, choose the more restrictive record set or restrict the range of records you are searching by adding other search terms such as state or country.

- Adding new search terms by clicking the Add button.
- Changing the values and operators.

You must enter values for fields highlighted by asterisks.

- Reordering the search fields by clicking Reorder.

Note: You cannot delete any of the fields provided by Oracle. You can only delete fields you added.

4. Click Search.

The application displays the search results.

5. To save your modified search as a new saved search (list) do the following:

   a. Click Save.

   The Create Saved Search window appears.

   ![Create Saved Search window](image)

   b. Enter a new name for the saved search.

   c. Optionally, you can set this search to be the list that appears whenever you navigate to the work area by selecting the Set as Default option.

   d. Click OK.

Searching for the Account to Access Opportunities and Other Related Objects

Search for the account and then drill down to the object from the Account Overview page. Whatever search method you use, always remember that you may not have permission to access all information in the application. For example, to see an opportunity, you may have to own the sales territory, be on the sales team, or manage someone who is.

There may be a delay of a few minutes between the time you create or update a record and when you and others can search for it. That’s because the application must update an index to enable searches. You can access newly-created items from the Recent Items list in the meantime.
Related Topics

- Creating a New List in a Work Area: Worked Example
- How can I create saved searches with just one custom field?
- Deleting or Hiding a List: Procedures
3 Process Leads

Lead Processing: Overview

Lead data is generated from a variety of sources and goes through further enrichment based on updates and follow-up activities. As a result, lead quality must be assessed periodically so that leads get distributed to the right salesperson to ensure timely lead follow up and closure.

This chapter contains information about:

- How to import lead data from an external data source into Oracle Sales Cloud using the File-Based Data Import feature.
- How to set lead rank, score, and lead qualification status for a selected batch of leads using the lead processing activity.

File-Based Data Import: How It Works

The Define File-Based Data Import group of tasks relies on integration with different Oracle Sales Cloud and architecture components, such as interface tables and application base tables. This topic provides an overview of these components to help you understand the import process and the different import activity statuses.

The following figure provides an overview of the major application components used when you import data from a file. These components include

- Import object
- Import mapping
- Import activity
- File repository
- Application Composer
- Interface tables
Import Objects, Import Mapping, and Import Activity

The import objects you select when you create an import activity are provided by Oracle. They are managed using the Manage File Import Objects task.

**Note:** Avoid concurrent submission of File-Based Data Import jobs for the same import object. Concurrent submission of multiple import jobs with same content results in creation of duplicate object records.

When you create an import activity, you must specify a mapping of the fields in your file to the attributes of the import object. You can create the mapping while creating an import activity or separately using the Manage File Import Mappings task. The mapping is stored and managed as a separate object.
File Repository
The text or XML data file you upload for import is stored in a file repository so that it is available for import processing when you schedule an import activity. Any attachments you upload are stored in the same repository.

Application Composer and Custom Extensions
When you create additional attributes for import using Application Composer, these extensions are stored in a separate repository and are available when you generate import and export artifacts in composer.

Interface Tables
The import activity populates the application interface tables with your data.

Oracle Sales Cloud Base Tables
The import activity loads your data into Oracle Sales Cloud base tables to complete the import.

Related Topics
- File Import Activity Statuses: Explained
- Importing Data from a File: Procedure

Importing Leads Using File-Based Import: Explained
This topic explains how to prepare and import lead data from an external data source into Oracle Sales Cloud using the File-Based Data Import feature. You enter your lead information using the Lead Qualification work area or you can import data to create or update existing sales leads.

Consider the following questions when importing your data:
- How does your legacy system or source system represent the sales lead compared to how Oracle Sales Cloud represents the same data?
- Do you have to configure values in Oracle Sales Cloud to map to your data values?
- Do you have to customize the Oracle Sales Cloud object model to capture additional attributes that are critical to the way you do business?
- What import features are available for importing your business object?
- How do you verify your imported data?

Comparing Business Object Structures
You must understand how your sales lead data corresponds with the data in Oracle Sales Cloud so that you can map your legacy data to the data that Oracle Sales Cloud requires. First, you must understand how Oracle Sales Cloud represents the structure of the data for a sales lead.
The sales lead structure is hierarchical. At the top level is the lead summary, which must exist before you can import lower level components such as team members and activities. This hierarchical structure supports one-to-many relationships between the components that make up the lead. For example, a lead can have many sales team members and activities.

The lead summary contains basic information about the lead such as the account or prospect details, status, and deal size. For each lead, you can add contacts, assign sales team members, and associate products. As you pursue the lead, you can:

- Track activities and assign due dates
- Attach documents relevant to the lead
- Post notes for the lead

Import Objects for the Lead
To facilitate importing leads, Oracle Sales Cloud incorporates the structure of the sales lead into import objects. The following table lists the import objects for the lead.

<table>
<thead>
<tr>
<th>Import Object</th>
<th>Structure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead</td>
<td>Contacts</td>
</tr>
<tr>
<td></td>
<td>Sales Team</td>
</tr>
<tr>
<td></td>
<td>Products</td>
</tr>
<tr>
<td></td>
<td>Attachments</td>
</tr>
</tbody>
</table>

You can create accounts and contacts, or associate existing accounts and contacts. You can optionally create campaign responses that are associated with the leads.

<table>
<thead>
<tr>
<th>Note</th>
</tr>
</thead>
<tbody>
<tr>
<td>Notes</td>
</tr>
<tr>
<td>Attachments</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Activities</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities</td>
</tr>
<tr>
<td>Notes</td>
</tr>
<tr>
<td>Attachments</td>
</tr>
</tbody>
</table>
Comparing Business Object Data

Each import object is a collection of attributes that helps to map your data to Oracle Sales Cloud data values and to support one-to-many relationships between the structural components that make up the sales lead.

You must understand the attribute details of the import objects so that you can prepare your import data. You can use reference guide files that contain:

- Attribute descriptions
- Values that populate attributes by default when you do not provide values
- Validation information for each attribute

The validation information includes the navigation path to the task where you can define values in Oracle Sales Cloud. For example, you have values in your data that correlate to a choice list in Oracle Sales Cloud. The validation information for that attribute provides the task name in the Setup and Maintenance work area where you can define your values. For additional information, including a list of reference guide file names and locations that you need to complete this task, see the following table.

<table>
<thead>
<tr>
<th>Import Object</th>
<th>Related Import Object Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lead</td>
<td>Lead Import Object and Attributes: How They Work Together</td>
</tr>
<tr>
<td>Note</td>
<td>Note Import Object and Attributes: How They Work Together</td>
</tr>
</tbody>
</table>

You can explore related topics by entering the following keywords in the Help application search: importing leads

Extensible Attributes

If you want to extend the Oracle Sales Cloud object to import your legacy or source data, then you must use Application Composer to:

- Design your object model extensions
- Generate the required artifacts to register your extensions
- Make your extensions available for importing

The corresponding import object is updated with the extensible attributes, which you can then map to your source file data. You can use the same source file to import both custom attributes and the standard import object attributes.

Importing Sales Leads Using File-Based Data Import

For the lead business object, you must use the File-Based Data Import feature. You prepare XML or text source data files in a form that is suitable for file-based import. The file-based import process:

- Reads the data in your source file
- Populates the interface tables based on your mapping
- Imports the data into the application destination table

The Define File-Based Data Import Setup and Maintenance task list includes the tasks that are required to:

- Configure the import objects
• Create source file mappings
• Schedule the import activities

You submit file-based import activities for each import object. When you’re creating a marketing budget, you first import the Budget object, followed by subsequent import activities for each of the other import objects. The exception is Attachments, which are imported by including the file names in your source file for the marketing budget object and selecting the files when defining the import activity.

You must be assigned the Corporate Marketing Manager, Marketing Analyst, Marketing Manager, Marketing Operations Manager, Marketing VP, Sales Lead Qualifier, or Sales Representative job role to access and submit the import activities for sales leads.

Verifying Your Imported Data
Oracle Sales Cloud provides File-Based Import activity reports, which you can use to verify imported data. Users with access to the associated business objects can also view the imported sales lead.

Related Topics
• Getting Started with File-Based Import: Documentation Overview
• Lead Import Objects: How They Work Together
• Extending Oracle Sales Cloud: How It Works

Import Activity Source File Options: Explained
The Import Activity is a step-by-step guided process to assist you with creating an import activity for a given object. This topic describes the source file options defined in the Import Activity that are used by the import process to locate and parse the source file data.

Source File Data
Enter attribute details pertaining to the source file from the following table:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Type</td>
<td>Source file must be either Text, ZIP, or XML.</td>
</tr>
<tr>
<td>Data Type, Delimiter, and Header Row Included</td>
<td>A Text file type can further be defined based on how the data is delimited and if the source file is expected to include a row of headings for each column.</td>
</tr>
<tr>
<td>Import Mapping</td>
<td>Displays a list of predefined mappings for the object selected for this import activity. The selected mapping will be used as the basis for mapping your source file in the next Import Activity step.</td>
</tr>
</tbody>
</table>

Source File Location
The following outlines the options that are available to you when locating your source file for import.
Import Activity Import Options: Explained

This topic describes the import options available while creating import activities.

Source File Data Transformation

The following options are used to identify the formatting of source file data so that the data can be correctly interpreted and transformed by the import process:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Decimal Separator</td>
<td>The format of the fractional portion of numerical values in columns mapped to attributes with a decimal attribute type.</td>
</tr>
<tr>
<td>Date Format</td>
<td>The format for values in columns mapped to attributes with a date attribute type.</td>
</tr>
<tr>
<td>Time Stamp Format</td>
<td>The format for values in columns mapped to attributes with a time stamp attribute type.</td>
</tr>
<tr>
<td>File Encoding</td>
<td>The overall encoding of the characters within the file.</td>
</tr>
</tbody>
</table>

Interface to Target Import Options

Depending on the object that you’re importing and the application modules you’ve implemented, you can select one or more of these options.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Import Mode</td>
<td>For importing leads and employee resources only, you have the option of specifying if you want to create and update records or update only. If you select update, then any new records will be ignored by the import process. For all other import objects, both create and update operations are available.</td>
</tr>
<tr>
<td>Allowable Error Count</td>
<td>The Allowable Error Count threshold determines whether to automatically cancel an import if the number of consecutive rows with validation errors exceeds the user defined threshold value.</td>
</tr>
</tbody>
</table>
Using Leads

Chapter 3

Process Leads

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allowable Error Count</td>
<td>The default value for Allowable Error Count is 2000 but you can change this value when configuring your import. During the <em>Preparing Data for Import</em> step only, if the number of consecutive rows in your input file with a validation error exceeds the Allowable Error Count value, then the import will be canceled. If the Allowable Error Count is not reached in this step, then the import will proceed. Errors encountered during the <em>Importing Data</em> step are not counted towards the Allowable Error Count. Validation errors include:</td>
</tr>
<tr>
<td>• Missing required values</td>
<td></td>
</tr>
<tr>
<td>• Values that exceed the attribute length</td>
<td></td>
</tr>
<tr>
<td>• Invalid identifiers and lookup codes</td>
<td></td>
</tr>
<tr>
<td>Duplicates found using matching configurations for Customer Data Management objects do not contribute to the error count.</td>
<td></td>
</tr>
</tbody>
</table>

| Notification E-Mail | The e-mail of the intended recipient of import processing notifications. Currently this option is supported only for Opportunity, Lead, and custom objects. |

| Customer Data Management Duplicates | You can select the options in the Customer Data Management LOV for handling duplicates when you're importing accounts and legal entities either alone or as part of another object. |

**Note:** You can use the Customer Data Management Duplicates LOV to retrieve duplicates only if you have licensed the data quality functionality. Once licensed, you must rebuild the keys for your matching configuration using the Manage Enterprise Data Quality Matching Configurations task. For more information, see the Define Data Quality chapter in the Oracle Sales Cloud Implementing Customer Data Management guide. The duplicates are determined using the following matching configurations: |
| • Address Duplicate Identification |
| • Contact Duplicate Identification |
| • Account Duplicate Identification |

Using this option, which is available only if you’ve licensed the data quality functionality, you can select different options for handling duplicates when you're importing accounts and legal entities either alone or as part of another object. The duplicates are determined using the following matching configurations: |
| • Batch Location Basic Duplicate Identification |
| • Batch Person Basic Duplicate Identification |
| • Batch Organization Basic Duplicate Identification |

You can select from one of the following: |
| • Do Not Import Duplicate Records |
| If the main object of the Import Activity is an account or a legal entity object, then the rows that are matched to existing records will not be imported. These duplicates records are reported in the Exception and Error reports. |
| If the Customer Data Management objects are components of another object and one or more matches are found, then the existing duplicate records are evaluated to determine the
### FAQs for Lead Import

**What happens if I inactivate an Import Activity?**

The Import Activity will not stop the currently running process. However, it will cause the next scheduled process plus any future repeating file import activities not to start. You can always activate the process at a later stage.

**What happens if I add a marketing list in the Import Activity definition?**

File-based data import enables you to record consumers and organization contacts in a marketing list when importing consumer, lead, and response import objects. Select an existing list or create a new one. A marketing list is assigned the list type value of Imported if created while defining an import activity. After the objects are imported successfully, the consumers and contacts are added as members of the marketing list.

### Lead Processing Activities: Explained

Lead data is generated from a variety of sources and goes through further enrichment based on updates and follow-up activities. As a result, lead quality must be assessed periodically so that leads get distributed to the right salesperson to ensure timely lead follow up and closure. This topic outlines the lead processing activity that sets lead rank, score, and lead qualification status for a selected batch of leads.

Leads are distributed to individual salespeople and sales territories for further qualification and follow-up. The Create Lead Processing Activity page enables you to:

- Define and submit lead processing activities
- Search for and select specific leads to process
- Start or schedule the lead processing activity
Activity Details

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. The process type determines the type of activity you want to process such as:

- Lead assignment
- Qualification
- Ranking
- Scoring
- Territory realignment

Each type is associated with appropriate rule group names and rule set values for the profile option used to activate the lead processing activity. For example, if you select lead ranking as the process type, then rules of ranking type are used for processing the selected leads. If the lead requires territory realignment only, then select the **Realign with territories** process type. You are prompted to enter a date to filter previous territory realignment batches.

Realignment with territory identifies all territories that were updated past the specified date. Lead management then identifies all leads which contain one or more of those realigned territories and reassigns those leads.

Lead Selection

You can use filtering criteria for selecting leads as input to the lead processing activity. For example, you can process leads imported within a specific batch by providing the **Import Activity Identifier**. The selected leads are processed (qualified, ranked, scored, assigned) based on the corresponding rules defined within the assignment manager engine.

Schedule

Lead processing activities are scheduled for the purposes of periodic ranking, scoring, qualification, and distribution of leads. Due to the periodic nature of all lead processing activities, it is necessary to automate the running of these activities. Enter scheduling options such as schedule mode and frequency to determine when the lead processing activity should begin and how often the activity is repeated.

**Related Topics**

- Batch Assignment Diagnostic Log: Explained
- Running Lead Batch Assignment in Diagnostic Mode: Example
- Purge Batch Assignment Information: Explained

Lead Scoring: Example

Use a lead score only when the lead is easily quantified. You might use the score to calculate the lead rank. You can schedule when and how often to process lead scoring through assignment manager functionality. This topic provides an example of how a lead score is calculated. It also lists the data points used to form part of the overall score evaluation.
How Lead Score Is Determined

Lead scoring capability requires the rules engine to determine a numeric score based on the value of the lead attribute participating in the rule. For example, consider the following rule: If a lead contact is a high level executive, then add a score of 100. If the lead contact is an operations manager, then add a score of 50. When this rule evaluates, it determines the score of the lead based on the job title of the lead contact. After the rules engine evaluates all such rules, the result of the scoring process is the aggregate score, which is then recorded in the Lead Score attribute.

Data Points for Lead Scoring

The following data points form part of the overall score evaluation:

- All data included on the lead and primary product
- Lead source data such as campaign attributes
- All customer profile data including industry
- All contact profile data

Lead Ranking: Explained

When setting up lead management capabilities, you can predefine criteria to rank leads and automate the assignment of leads to the appropriate resource in your organization. You can define lead rank to categorize leads into buckets such as Hot, Warm, or Cool. This topic describes the following:

- Setting Up Lead Rank
- Creating Ranking Rules
- Calculating Lead Rank Based On Score

Setting Up Lead Rank

Although lead rank and lead score aren't the same, they serve a similar purpose. You can use a score when the lead is quantified. You can then use the score to calculate the lead rank. Lead rank values are used as part of the qualification and assignment process for sales leads. Using the assignment manager feature, perform the following steps to set up lead ranks:

1. Select the predefined lead work object.
2. Select the predefined ranking candidate object.
3. Associate the ranking candidate objects with the lead work object.

Note: No predefined mapping for the rank candidate object exists in the assignment objects. Mapping is only for territory-based assignment.

4. Use the predefined objects during the creation of assignment rules (rule-based assignment).
5. Assign rules to determine the appropriate classification of a work object that provides a rank value for the lead.
Creating Ranking Rules

When a sales lead is created, a lead rank is first calculated by the assignment manager engine based on rules. The ranking classification rule set type determines the rank of the lead based on the values of the attributes on the lead. The following data points are available to help evaluate lead ranking rules:

- All data included on the lead and lead primary product data
- All customer profile data including industry and customer size classifications
- All contact profile data
- All lead qualification data

You can set up a lead rank rule as follows:

1. Create a rule set with a rule set type of Classification Rule.
2. Set the work object as lead and the candidate object as lead rank.
3. Create a rule with conditions that match the attribute settings you want a lead to have to give it a rank value.
   For example, you might select the Decision Maker Identified attribute name and then select the equal (=) operator.
4. Enter the value of True.
5. Create any other remaining conditions that you want, and then enter the action for your rule, such as Return the candidate value as Hot.

Calculating Lead Rank Based on a Score

You can schedule when and how often to process lead ranking where the lead rank value or score is calculated and displayed. Ranking rules, used by the assignment manager engine, determine what rank to assign to a lead. You can also create ranking rules that use the lead score as the criteria to name each range of scores with a specific rank. For example, if the lead score is between a value range of 0 and 39, you can create a rule to rank the lead as low priority. If the lead score is between a value of 40 and a value of 60, then create a ranking rule that assigns a medium rank to the lead. The assignment manager engine passes the rank value to the lead management capability and is displayed as a list. You can override the value by selecting a different predefined rank code or value from the list. You can also select the Rank option from the Actions menu to automatically assign a rank for your selected lead.

Related Topics

- Lead Scoring: Explained

Lead Ranking Rule: Example

You can define a lead rank to categorize leads into buckets such as Hot, Warm, or Cool leads. Such categorization of leads enables a salesperson to quickly prioritize leads for follow-up activities. This topic provides an example of how to create a lead rank rule.
Creating a Lead Rank Rule

Your organization wants to assign a rank of Hot to sales leads that have a set time frame and a decision maker identified. The assignment manager capability for leads has predefined the lead work object and lead candidate object. You can set up an assignment rule to determine the appropriate classification to apply a rank to all leads for your organization as follows:

1. From the Manage Sales Lead Assignment Rules page, create a rule set.
2. Select the classification rule type, Sales Lead work object, and Lead Rank as the candidate object.
3. From the Associated Rule Set Groups tab, create a rule set group and name it Ranking. You can search and select another rule set group (if one exists), to associate to the classification rule type.
4. Set the conditions for each rule that the rules engine checks during assignment processing. For example, enter the following rule conditions:
   - Object: Sales Lead Work Object
   - Attribute: Time Frame
   - Operator: Equals
   - Value: Three months

5. Click Add Row icon in Conditions and enter the following details:
   - Object: Sales Lead Work Object
   - Attribute: Decision Maker Identified
   - Operator: Equals
   - Value: True
   - Action: Return the candidate value as Hot

6. Click Save and Close.

The assignment manager engine:
- Finds the matching leads
- Executes the rules
- Assigns the rank value
- Passes the rank value onto the lead

Related Topics
- Lead Assignment Rules: Explained

Lead Status: How It Automatically Is Set

Lead quality is assessed as soon as a lead is generated. This topic describes the settings that are used to determine the qualification status of a sales lead. Lead quality of a newly created lead is based on the following:
- Characteristics of the customer contact on the lead
• Type of response which caused the lead to be generated
• Stage and type of the campaign

Lead quality is further assessed based on added qualification data such as customer need, urgency or time frame for the project, and whether a budget is approved for the product.

Settings That Affect Lead Qualification Status

Leads can get their qualification status from:

• Assignment manager engine rules
  Rules-based leads qualification process helps standardize the lead qualification process. Based on the positive results to conditional rules, the value of the Lead Status attribute is set to Qualified. For example, a rule can be defined to update the lead as qualified if the:
    - Customer’s budget status is approved
    - Project time frame is three months
    - Decision maker is identified
    - Response type is that the customer attended an event

• A specified value in the campaign lead generation stage
  A multistage campaign design can include lead generation stages. Lead options include the ability to designate a value for the qualification status. When the campaign is executed, leads are created with the qualification status value provided.

• An imported value
  Leads imported through file import can include a designated lead qualification status.

How Lead Qualification Status Is Calculated

In some companies, the lead qualification data gathered by lead qualifiers is considered in the scheduled automated process that calculates lead score or lead rank as well as assigning sales team territories. For such companies, a simple rule to move leads to a Qualified status when the lead score reaches a specific threshold is sufficient.

Lead Assignment: How It Is Processed

Once lead data is cleansed, created, enriched, and scored, the leads need to be assigned. Leads can be assigned based on several criteria. For example, you can configure assignment management functionality to assign leads based on the following:

• Lead source
• Geography
• Named accounts, such as the top 20
Components That Affect Lead Assignment

The following lists the components that influence the assignment of leads:

- Lead work objects
- Lead candidate objects
- Attributes
- Mapping and rule conditions

How Leads Are Assigned

Leads can be assigned based on simple rules evaluation. Leads that have an associated account with an address are distributed based on territory definitions. Territory-based evaluation can be supplemented by adding filtering rules to further refine the lead assignment. Territory-based evaluation uses:

- Lead work object
- Territory candidate object data
- Mappings between the territory dimensions and lead dimensional attributes to execute the assignment processing

Lead Assignment Setup

Set up the following for assigning leads:

- Set up the necessary lead work objects, and associated candidate objects to be assigned by assignment management functionality.

  ✍️ **Note:** A default set of lead work objects and associated candidate objects are predefined.

- Set up rules and rule sets specific to your business requirements. For example, set up an assignment rule to assign leads with deal size less than a certain amount to partners.
- Set up object mappings for territory-based assignment. For example, assign a lead to those territories where Territory dimensional attributes are mapped to corresponding Lead attributes.
- Set up rules to filter territories that match the lead based on additional information on the lead. For example, set up rules to exclude prime sales territories that match leads which are unqualified.

Territory-Based Assignment

Territory-based assignment relies on an association between attributes on the lead work object and attributes on the lead territory candidate object to match the candidates to the work object. For territory-based assignment, the lead work object
and lead candidate object must have attributes that share the same domain of values. The mapped attributes are used for matching appropriate candidates for a work object. For example, a sales lead (work object) has a geographic location attribute. The lead candidate object (territory) has also a geographic location attribute. These two attributes are mapped to each other.

**Related Topics**

- Lead Assignment Objects: Explained
- Lead Assignment Rules: Explained
4 Follow Up Leads

Lead Management: Overview

Lead management features help to align marketing and sales objectives from lead generation to lead execution. This ultimately contributes to increasing revenues. Lead information is generated and captured from:

- A company’s existing contacts
- Sales campaigns

All leads then undergo the qualification and assessment process and are qualified either manually by a salesperson or automatically based on predefined rules. Finally, qualified leads are converted into opportunities.

How Lead Components Fit Together

A sales lead cycle ends when a lead is converted to an opportunity or when a lead is retired. A lead is retired if no possibility exists for converting the lead to an opportunity. The lead life cycle includes an automated process that captures leads and then prioritizes them for sales engagement through a scoring and ranking process. Leads are distributed to appropriate sales resources for further lead qualification, follow-up, and conversion.

Leads Life Cycle

Leads are automatically monitored for sales representative acceptance. Unaccepted or rejected leads are reassigned as appropriate. The quality of the lead is continuously reviewed and adjusted by the lead owner at different stages of the lead life cycle. The lead owner can be a marketing resource or a sales resource, depending at what stage the lead is at in its life cycle. The lead life cycle is captured in the following sections:

- Lead Generation
- Lead Qualification
- Lead Distribution
- Lead Assessment
- Lead Conversion

Lead Generation

Leads are generated and captured from many different sources such as:

- Campaign responses
- Campaign stages handled by telemarketing
- Third-party lead sources
- Sales prediction application through the creation of new leads

Flexible lead import, customer and contact creation, and deduplication ensure that marketing lead generation efforts are optimized. For example, the lead import process checks whether leads represent new or existing customers. For new
customers, data must be created for the lead. If the lead is an existing customer, then part of the lead import process checks to ensure customer and lead information isn’t duplicated.

Lead Qualification
Marketing departments help with the lead qualification process to ensure that only qualified leads are handed over to sales. Leads are typically ranked as Hot, Warm, or Cool. Leads are further qualified by the use of company-specific standard questions to score a lead. Lead scores are numeric values typically ranging from 1 to 100, in which a high score represents high quality.

It isn’t good practice to let stale leads build up. Standardized criteria for lead qualification ensure that quality leads reach the sales representative and maximize the conversion rate from leads to opportunities. For example, your organization has criteria and processes for ensuring that leads are either developed or retired within 30 days. When the lead age is greater than 30 days and the rank is Warm, Marketing reassigns the leads for follow-up by an internal telemarketing group. If the leads can’t be qualified or further developed to revenue opportunities, then the rejected leads can be reassigned or can be retired manually.

Lead Distribution
As the qualification of leads progresses into real potential prospects, assignment manager uses expression-based rules to associate one or more internal sales representatives with each lead. If the lead is associated with either a sales prospect or a sales account, then assignment manager uses territory definitions to associate (typically one) internal territory with each lead. The sales representative newly assigned to the lead can be related to the lead record directly through the lead team or indirectly through a territory associated with the lead. The sales representatives can view and update those leads assigned to them in the lead work area and can claim ownership of the lead by accepting the lead.

Other assigned resources can view and update the lead, but they can’t make themselves the owners. If a sales prospect changes to a sales account by adding an address, assignment manager is automatically called during the next automated assignment cycle. Depending on the assignment logic, the lead can be reassigned to a different territory or sales resource. If the assigned sales representative takes no action on a lead for several days, then the lead can be manually reassigned to another sales representative.

Lead Assessment
Sales representatives must evaluate the quality of the information that they have received for the lead. They determine whether the details are sufficient to reach out to the customer and assess whether a lead is worth pursuing with the help of preconfigured assessment templates. Assessment templates can qualify the lead by:

- Reviewing the content shared with the customer during a campaign
- Framing the lead in the context of the campaign
- Ensuring the salesperson understands the information that has already been sent to the customer

You use the lead assessment feature to assess leads. Predefined questions help determine the likelihood of the lead being accepted by Sales. For example, you’re a sales representative and you ask the customer a series of questions created by Marketing and Sales to assess the quality of the lead. You record the answer of each question and the lead assessment tool automatically factors the answer into the assessment score of the lead. At the end of the call, you note that the assessment lead score is high, so you request that the lead is assigned to the direct sales team. If the lead score was low, then you might want to retire the lead. If the lead needs qualifying, then you can decide to leave it in your list of leads for follow-up. Finally, if the lead is good, but the potential revenue opportunity is less than a predetermined monetary amount, for example, twenty-five thousand dollars, then you can convert the lead to an opportunity to pursue as part of the sales cycle.
Lead Conversion

After establishing that the lead has potential, the sales representative can convert the lead to an opportunity. You can schedule meetings and presentations with your lead contact to move the opportunity along the sales pipeline. To track the progress of the lead, you can capture contact notes and associate them with the contact and opportunity. As the lead progresses through its life cycle, decisions to retire the lead are based on the following:

- You can't verify the customer and lead details.
- The customer isn't interested in pursuing the lead any further.

Lead Actions: Explained

Use lead actions to manage leads. This topic provides a brief description of the actions that you perform on a lead. Lead actions are generally grouped into the following categories:

- Standard create, edit, delete, and update functions such as performing a mass update
- Ranking, scoring, and qualifying actions to assist in prioritizing leads
- Accepting, rejecting, reassigning, and retiring actions to ensure leads are in the right queue for pursuing
- Converting leads to opportunities to continue sales pursuits and include in sales forecasting

The ability to perform each action depends on:

- Privileges assigned to your role
- Access level as a lead sales team member
- Current status of the lead

Lead Actions

The following table shows the actions that you can perform to manage leads:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mass Update</td>
<td>Performs a mass update of specific attributes and custom attributes from the Leads Overview work area when selecting multiple records.</td>
</tr>
<tr>
<td>Rank</td>
<td>Submits the Request Sales Lead Assignments process to automatically assign a lead rank based on predefined rules specified in the Assignment Rule for Ranking Leads profile option. A rank represents the priority of the lead, such as Hot, Medium, and Cool.</td>
</tr>
<tr>
<td>Score</td>
<td>Submits the Request Sales Lead Assignments process to automatically assign a lead score based on predefined rules specified in the Assignment Rule for Scoring Leads profile option. Lead assignment score is different from qualification and assessment scores. A lead score can be used as a source for predefined rules that automatically assign lead rank, qualification status, territories, and resources.</td>
</tr>
<tr>
<td>Qualify</td>
<td>Updates the lead status to Qualified, bypassing the automated sales lead classification process.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>----------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Reassign</td>
<td>Provides choices for when the sales lead assignment process evaluates the lead to reassign sales team members and territories to the lead:</td>
</tr>
<tr>
<td></td>
<td><strong>Automatic assignment</strong></td>
</tr>
<tr>
<td></td>
<td>Lead is selected for reassignment and is reassigned when the Request Sales Lead Assignments process next runs using the Reassign process selection criteria.</td>
</tr>
<tr>
<td></td>
<td><strong>Immediate automatic assignment</strong></td>
</tr>
<tr>
<td></td>
<td>Immediately runs the Request Sales Lead Assignments process, reevaluating, and reassigning per the process.</td>
</tr>
<tr>
<td></td>
<td><strong>Manual assignment</strong></td>
</tr>
<tr>
<td></td>
<td>You can select an owner to assign to the lead from a list of eligible resources.</td>
</tr>
<tr>
<td></td>
<td>A lead must have a Qualified or Unqualified status to be reassigned.</td>
</tr>
<tr>
<td>Retire</td>
<td>Updates the lead status to a retired lead indicating the lead is no longer one that needs pursuing.</td>
</tr>
<tr>
<td>Reject</td>
<td>Removes you as the lead owner. The accepted indicator and assignment status are also updated to reflect that the lead is no longer accepted. The lead is eligible for reassignment when:</td>
</tr>
<tr>
<td></td>
<td>• The next scheduled Sales Lead Processing Activity submits the Request Sales Lead Assignments process</td>
</tr>
<tr>
<td></td>
<td>• The lead meets the processing activity's selection criteria</td>
</tr>
<tr>
<td></td>
<td>• The previous lead owner is excluded when assigning team resources</td>
</tr>
<tr>
<td></td>
<td>The reject reason, and the number of times the lead is rejected, is available when searching leads. This information is displayed in the Overview page for analysis and to provide possible indicators that the lead should be retired.</td>
</tr>
<tr>
<td>Accept</td>
<td>Updates the lead with you as the owner. The Request Sales Lead Assignments process is submitted to automatically assign sales team territories and resources based on predefined rules. The rules are specified in the Assignment Rule for Ranking Leads profile option.</td>
</tr>
<tr>
<td>Convert to Opportunity</td>
<td>Creates an opportunity based on lead information. The lead status is updated to converted.</td>
</tr>
<tr>
<td>Submit for Approval</td>
<td>Click Submit for Approval when you are ready to register the lead for the approval of a channel account manager.</td>
</tr>
<tr>
<td>Status</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Unqualified</td>
<td>A lead with a status of unqualified signifies that the lead requires additional information and qualification activities by the lead team. Unqualified is the default status assigned to all newly created leads.</td>
</tr>
<tr>
<td>Qualified</td>
<td>A qualified lead signifies that the lead is ready for sales attention. The status can be updated to qualified by either the user selecting the Qualify action or upon successful completion of the qualification processing activity. Leads can have a status of qualified based on many factors including the status of the budget and the time frame of the project.</td>
</tr>
<tr>
<td>Converted</td>
<td>When a lead is converted to an opportunity, then the status is set to Converted.</td>
</tr>
<tr>
<td>Retired</td>
<td>The status of a lead is updated to Retired when a user selects the Retire action. A lead is retired when:</td>
</tr>
<tr>
<td></td>
<td>• There is no likelihood of the lead being converted to an opportunity</td>
</tr>
<tr>
<td></td>
<td>• A lead is no longer followed up by Sales</td>
</tr>
<tr>
<td></td>
<td>• A lead is not evaluated by Marketing over a certain period of time</td>
</tr>
<tr>
<td></td>
<td>A retired lead can’t be converted to an opportunity. Marketing users can review retired leads and then delete them as required.</td>
</tr>
</tbody>
</table>

Creating Leads with New Contact and Account: Procedure

You can enter leads for new sales prospects without associating an existing contact or account with the lead. As part of the lead management ready to use functionality, this is achieved by typing the contact name and account name directly onto the lead.

Creating Leads with New Contact and New Account

To create a lead for a new sales prospect without associating an existing contact and account:

1. Sign in as a salesperson and navigate to the Leads area.
2. Click Create Lead.
3. From the Create Lead page, enter the name of your contact in the Primary Contact field.

   As you enter the name, note that any existing matching contacts are automatically suggested which you can choose to ignore, as applicable.
4. Enter the name of the account in the Account field.
5. Enter other lead details as required, and when finished, click Save and Close.

When you convert the lead, the Primary Contact and Account on the converted lead will show links to the newly created contact and account.
Converting Leads with New Contact and Account: Procedure

You can convert leads for new sales prospects with a new contact and a new account. When a sales prospect lead is converted, a new contact and account are created in Oracle Sales Cloud along with a new opportunity.

Converting Leads with New Contact and New Account

To convert a lead for a new sales prospect with a new contact and a new account:

1. Sign in as a salesperson and navigate to the Leads area.
2. Select the sales prospect lead that you want to convert.
3. From the **Edit Lead** page, enter other lead details as required and when finished, click **Save**.
4. From the **Actions** menu, select **Convert**.
5. From the **Convert** dialog, click **Submit**.

A new contact and a new account are created during the lead to opportunity conversion. The newly created contact and account are now associated with both the opportunity created during conversion and the converted lead. The **Primary Contact** and **Account** fields on the converted lead contain links to the newly created contact and account. Prior to the conversion, they are both listed as a value in their respective drop down lists.

Lead Qualification: Explained

The lead qualification process can either be performed by internal marketing or internal sales groups. This topic provides a brief overview of what constitutes a qualified lead. Qualifying leads is an important first step in bringing the sales lead to a conclusion. At the end of the lead qualification process, you can classify the lead as a qualified lead that is ready for conversion to an opportunity. Or you can retire the lead if the purchase interest for the lead can’t be validated. What constitutes a qualified lead varies from company to company.

Basic Lead Qualification

In some companies, basic lead qualification data is gathered by lead qualifiers and contains data such as:

- Customer need
- Urgency or time frame for the project
- Budget considerations such as available amount and status

The scheduled process that determines lead qualification status also takes into consideration basic lead data.

Additional Lead Qualification

In other companies, the lead qualifier or salesperson uses a lead qualification questionnaire as part of the qualification process. Based on the answers received, he or she can decide to manually set the lead to a Qualified status using the lead actions menu. Your application administrator assigns the questionnaire to your Lead Qualification Template profile. The
answers entered are assessed using a weighted scoring model with instant feedback available as a scoring status bar in the UI.

Related Topics
- Defining a Sales Lead Qualification Template: Example

Qualifying Leads: Examples

This topic explains the lead qualification process and provides examples of the different methods used for qualifying leads.

Lead Qualification Process

Lead quality is assessed as soon as a lead is generated and is mainly based on:

- The characteristics of the customer contact on the lead
- The type of response which caused the lead to be generated
- The type of sales campaign that the lead may be associated with

Leads are enriched further, typically by means of prequalification telemarketing activities performed by internal marketing, internal sales groups, or external third-parties. Qualification data is added to the lead such as:

- Customer need
- Urgency or time frame for the project
- Budget considerations such as available amount and status

At the end of this process, the lead is either:

- Classified as a qualified lead which is ready for conversion to a sale
- Retired if purchase interest for the lead can’t be validated

The following scenarios illustrate some of the lead qualification processes.

Rule-Based Lead Qualification

The rule-based lead qualification process requires that the value of the Lead Status attribute be set to Qualified if qualification rules evaluate to a positive answer. For example, consider the rule:

IF budget status is approved AND time frame is 3 months
AND decision maker has been identified
AND response type is attended event
THEN rule is passed
ELSE rule is failed.

If this rule evaluates to TRUE, the value of Lead Status is set to Qualified.
Internal Marketing Qualification

Internal lead qualifiers or inside salespeople conduct phone conversations to gather qualification data about leads. They can use qualification templates to define consistent and specific qualification criteria for similar leads. The qualification questions are tailored to a specific product, industry, and source of the lead.

Before updating the lead status to qualified, the lead must have a valid primary product associated with it. Users can select multiple leads and select Qualify from the Actions list. Leads meeting the requirements for lead qualification are processed.

As the qualification data is gathered using the leads management user interface, the lead qualifier or salesperson can decide to manually set the lead to Qualified status. In some companies, the lead qualification data gathered by lead qualifiers is considered in the scheduled automated lead process. For example, the assignment manager engine can calculate lead score or lead rank, as well as assign sales team territories. For such companies, a simple rule to move leads to a Qualified status when the lead score reaches a specific threshold is sufficient.

A lead can be qualified when the basic attributes of the lead indicate interest in the purchase of a product. For example, basic attributes might include:

- Contact attended a product event
- Budget is approved
- Purchase time frame is less than a year

The Additional Qualification tab displays the qualification template with questions where you can enter the answers on the same page. Most of the data required to qualify the lead is available from the Basic Qualification area of the Lead details page. Supporting data is included in the contextual area for easy reference.

Internal Sales Group Qualification

Leads are generated and captured from many different sources. The sales prediction system generates and captures leads. Leads are created when customers are created. Leads are also generated from leads that already exist. After salespeople accept those leads generated by the sales prediction system, they can evaluate the quality of the information received for the lead. They determine if the details are sufficient to reach out to the customer and assess whether a lead is worth pursuing with the help of predefined assessment templates. If they can establish that the lead has potential and can be marked as qualified, they can then convert the lead to an opportunity. Contact is established and meetings and presentations are scheduled to move the opportunity along the sales pipeline.

External Third-Party Qualification

External third-party qualification involves using input from a third-party source to qualify leads. For example, your company has obtained a list of contacts that purchased a car in the last 90 days. You have hired a telemarketing company to call each contact to determine if there is interest in your company's auto security products. The third-party telemarketer provides weekly files of potential contacts who are interested in your products. Using the file-based data import feature and qualification rules configured using the assignment manager engine, the interactions resulting from the telemarketer's activities are imported as leads. The marketing operations manager schedules the rule-based qualification process to occur as soon as the enriched lead data is imported to the lead management application. If the rules evaluation is successful, the result sets the lead status as Qualified.
Performing a Lead Qualification: Procedure

Lead qualification helps in the lead follow-up process, in which the sales representative continues to assess the lead quality and lead conversion potential by using the preconfigured qualification templates.

Lead qualification is part of the lead follow-up activity where you further nurture the lead in order to qualify it. Your administrator must set the Advanced Lead Qualification Enabled profile option after the qualification templates are created. This action specifies the qualification template to display in the Edit Lead UI to assist with evaluating the lead.

You can conduct a lead qualification, view completed lead qualifications, and view the responses to the questions posed in the qualification template. Qualification templates enable you to analyze the lead and suggest the appropriate next steps based on the overall assessment score and feedback for the lead.

Performing a Lead Qualification

Use the following procedure to perform a new lead qualification.

1. From the Navigator, click Leads.
2. In the list of leads, click on a lead to edit it. The Edit Lead page appears.
3. Click the Qualification tab to open the default qualification template.
4. Fill out and complete the lead qualification template.

If there are multiple qualification templates associated with the lead, then you can choose to select a different qualification by clicking Replace Qualification.

Related Topics

- Creating Assessment Templates: Procedure
- Assessment Template Score Range: How It's Calculated
- Assessment Template Components: How They Fit Together

Performing Multiple Lead Qualifications: Explained

When you create a lead, you can perform qualification on the lead leveraging the many templates provided by your sales organization. This means you can evaluate various aspects of the lead which can subsequently help you sell more by converting the leads in less time.

Choosing the Qualification Template

After you create the lead, go to the Qualifications tab and view the recommended qualification that is created for you by your organization. You proceed to fill out and complete the qualification template. If there are multiple templates associated with the lead, select one by clicking Replace Qualification. Any responses for the current qualification will be reset and
can't be restored. You can choose to cancel the operation and use the current qualification template, or you can choose to continue.

If you continue, the qualification UI is refreshed to display the questions from the new template that you selected. You can then start providing responses to the questions. You can track the updates on the current qualification from the Qualification status fields on the page. Statuses toggle between: Not Started, In Progress, and Completed. You can also include other status values such as the number of questions you have answered, last updated date, and name of the template. You can also track the total score by summing up the weighted answers and viewing a graphical circular format of the score.

Applying Mass Update to Leads: Procedure

You can update attributes, including custom attributes, on multiple leads at once using the Mass Update feature. This topic explains how to use the Mass Update feature to apply changes to multiple fields on multiple leads at once. For example, you might want to change a custom field, such as Expiration Date, on multiple leads. You can query leads using the Expiration Date field, and then select which leads you want to update all at once. You can also use the Mass Update feature to update product information or primary contact information for leads.

Before you can use mass update, your system administrator must enable the update action using Application Composer and, optionally, set a profile option that controls how many lead records you can update at once.

You can update up to four fields on multiple leads using the **Update** action. You can update any of the following fields:

- Account
- Budget Amount
- Budget Status
- Campaign
- Currency
- Customer Need
- Deal Size
- Decision Maker Identified
- Description
- Primary Contact
- Primary Product
- Rank
- Sales Channel
- Source
- Time Frame

If custom fields have been defined, these are available for update as well.

Applying Mass Update to Leads

To apply a mass update to leads, perform the following steps:

1. From the **Leads** landing page, enter the search criteria for the leads that you want to update, and click **Search**.
2. Based on the leads returned from your search criteria, select the leads that you want to update at the same time.
3. From the **Actions** menu, click **Update**.
You can select or deselect leads by a single click on the lead record in the list. Use the select all and deselect all links to select or deselect all leads.

**Note:** By default, all the lead attribute fields on the Mass Update dialog box are read-only until you select to update them.

4. Select the attributes that you want to update and assign a value for each of the selected attributes.
   
   For lead attribute lists, their default value is displayed. Text fields are blank by default.

5. Click **Save and Close**.

**Related Topics**
- Enabling Mass Update for Leads

### Lead Assessments: Explained

This topic outlines how lead assessment templates enable a uniform assessment implementation across leads for your organization. Assessment templates provide guidance to sales resources to move the leads further along the sales cycle.

Using the lead assessment feature, you can:

- Define Lead Assessments Templates
- Associate Task Templates to Assessment Templates
- Assess Leads

**Define Lead Assessments Templates**

You can define assessment templates to include assessment questions that represent industry best practices, sales methodologies, or a combination of both. As you enter the different responses to the questions, an assessment progress bar provides immediate rating and feedback based on the assessment definition. You can also use assessment templates to standardize lead follow-up procedures. Lead assessment templates enable consistent and predictable assessment for all leads for your business unit.

**Associate Task Templates to Assessment Templates**

An additional component to the assessment is the ability to recommend additional tasks based on the assessment results. If task templates are associated to the assessment, a list of recommended task templates is presented to you based on the assessment's overall score. If applied, the tasks are added to the lead to support collaborative lead follow-up activities.

**Assess Leads**

Lead assessment is typically done as part of a lead follow-up activity where the lead continues to be progressed after the lead is qualified. The Lead Assessment Enabled profile option must be set by your administrator to display the Assessments tab in the Edit Lead user interface. If enabled, you can view the sets of predefined questions and answers collected to assist in evaluating the lead and perform the following actions from the lead's Assessment tab:

- Perform New Assessments
- Edit Assessments
• Remove Incomplete Assessments
• Reassess
• View Historical Performance

Related Topics
• Creating Assessment Templates: Procedure

Converting Leads

A lead’s life cycle ends either when a lead is converted to a sales opportunity, or when the lead is retired. Conversion to an opportunity stage allows the sales representative to pursue the account in the sales cycle. After establishing that the lead has potential, the sales representative converts the lead to an opportunity. Contact is established and meetings and presentations are scheduled to move the opportunity along the sales pipeline.

To convert a lead to an opportunity depends on the privileges assigned to your role, your access level as a lead sales team member, and the current status of the lead. You can convert a lead to an opportunity from the Actions menu by selecting **Convert**. This action creates an opportunity based on lead information. When a lead is converted to an opportunity, the lead status is set to Converted.

Converting Leads to Opportunities

You convert a lead to an opportunity when the lead is qualified and is ready for further processing along the sales cycle. Once the conversion is successfully completed, you can review the newly created opportunity using the opportunities UI. During your review, you might want to retain only a select few lead product lines to pursue as opportunity revenue line items. Since the conversion process automatically creates revenue lines from all lead lines, you can remove unwanted revenue lines from the opportunities UI. You can, at a later stage, create another opportunity from the removed lead revenue lines by converting the lead to an opportunity again. You can then decide to keep only those revenue lines that you want on the newly created opportunity.

When you convert a lead to an opportunity, the following rules may apply depending on the setup criteria for your company:

• The person converting the lead becomes the primary sales team member for the opportunity.
• The customer reference on the original lead is maintained for the opportunity.
• The associated lead team members are copied with the same primary team member.
• The newly created opportunity is assigned to the appropriate sales territories.

You can view opportunities associated with leads in the leads UI. If you do not see the converted lead in your list of opportunities, this means that the opportunity is assigned to a different territory.
Differences Between Response, Lead, and Opportunity: Explained

This topic describes the main differences between a response, a lead, and an opportunity.

<table>
<thead>
<tr>
<th>Response</th>
<th>Lead</th>
<th>Opportunity</th>
</tr>
</thead>
<tbody>
<tr>
<td>A response is an interaction initiated by the customer in response to a marketing stimulus. Every outbound marketing activity is a marketing stimulus.</td>
<td>A lead is an inquiry, referral, or other information, obtained through marketing campaigns, or other means that identifies: • Potential contact or prospect • Specific purchase interest You can create a lead if the specific purchase interest is not known when the lead is created. However, to qualify a lead you must record a primary purchase interest.</td>
<td>An opportunity is a pending sale of a product or service that can be forecasted and tracked using summary data such as: • Potential revenue • Sales stage • Win probability • Expected close date</td>
</tr>
<tr>
<td>Responses are created from interest recorded from responders in response to marketing activities. Responses include: • Providing answers to phone survey questions • Subscribing to a list • Replying to an e-mail response form request As interest for the product or service matures, responders are elevated as leads.</td>
<td>Leads are mostly created by automated lead capture or lead import processes which periodically create qualified responders as sales leads. Leads are sometimes created from the response data of a contact or prospect who has expressed a need or interest in a product or service offered by the business.</td>
<td>Opportunities are created by sales administrators when they have identified a qualified lead with a potential revenue opportunity. Leads are converted to opportunities when significant sales investment is foreseen to close the deal. A salesperson can create opportunities from scratch, without previously having a response or lead created.</td>
</tr>
<tr>
<td>Responses are solely owned by Marketing and aren't included as part of the sales forecast.</td>
<td>Leads are transferred between Marketing and Sales departments based on how the lead progresses through its life cycle. Leads aren't included as part of the sales forecast.</td>
<td>Opportunities are solely owned by Sales who have complete responsibility for managing the life cycle of an opportunity. Inclusion of opportunities in the sales forecast is at the discretion of the sales administrator. However, not all opportunities are included and the decision to include them may depend on your company’s requirements.</td>
</tr>
</tbody>
</table>

Creating a Copy Map: Procedure

Copy maps enable you to create new objects by copying existing objects. For example, you can copy responses to create new leads and opportunities, or you can copy deal registrations to create new opportunities. You use the copy maps feature to map child objects and attributes in the source object (From object) to objects and attributes in the object you are creating (To object).
To create a new copy map:

1. Sign in as a user with Application Composer access and verify that you have an active sandbox.
2. Access Application Composer by selecting Application Composer from the Navigator menu, under the Tools category.
3. In the Application field, select Sales, and under Advanced Setup, select Copy Maps.
4. Click New, and then enter a unique name for the copy map. You specify the unique name in a profile option after you have completed and saved your copy mapping file.

The Edit Copy Map window appears and you use it to define the copy map.

5. In the Application Module Mapping section, enter general information about the mapping as outlined in the following fields in the table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a name for the mapping file. The name is displayed in the Copy Maps window. You can use the name to locate and search for copy maps that you want to edit or delete.</td>
</tr>
<tr>
<td>To</td>
<td>Select the application module that you’re copying to. For example, if you’re copying leads to opportunities, then select the application module that includes leads.</td>
</tr>
<tr>
<td>From</td>
<td>Select the application module that you’re copying from. For example, if you’re copying responses to leads, then select the application module that includes responses.</td>
</tr>
</tbody>
</table>

6. In the Entity Mappings section, add a record for each view object that you’re copying by completing the following fields in the table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To</td>
<td>Select the new view object that you’re copying to.</td>
</tr>
<tr>
<td>From</td>
<td>Select the existing view object that you’re copying from.</td>
</tr>
<tr>
<td>Query Type</td>
<td>Select one of the three query types: Unique Identifier, Join, or All Records. If you select All Records, then don’t enter any information in the remaining fields.</td>
</tr>
<tr>
<td>Query Attribute</td>
<td>If you selected either Unique Identifier or Join in the Query Type field, then select an attribute to use during runtime. The attribute is used to filter the records that are copied to the new object. For example, if you select LeadId, during runtime, only the records matching the Lead ID passed to the copy map engine are copied.</td>
</tr>
<tr>
<td>Joined View Object and Joined Attribute</td>
<td>If you selected Join in the Query Type field, then use these two fields to specify the following:</td>
</tr>
<tr>
<td></td>
<td>◦ The view object to which this object is joined</td>
</tr>
<tr>
<td></td>
<td>◦ The attribute used as the basis of the join</td>
</tr>
</tbody>
</table>

7. Select each line in the Entity Mappings section, and add records to the Attribute Mappings section for each of the attributes by completing the following fields in the table:
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>To</td>
<td>Select the attribute to which the selected entity is copied.</td>
</tr>
<tr>
<td>Referenced View Object</td>
<td>If this attribute is a foreign key, select the view object joined by this foreign key. The application generates new foreign keys that keep the reference intact.</td>
</tr>
<tr>
<td>Primary Key</td>
<td>If this attribute is a primary key, select this check box. Instead of copying the value in the From object, the application generates a unique value for this key field in each record in the To object.</td>
</tr>
<tr>
<td>From</td>
<td>Select the attribute from which the selected entity is copied.</td>
</tr>
<tr>
<td>From Expression</td>
<td>Optionally, you can enter a Groovy expression to change the value in this attribute. For example, you want to change the value of the From object to some new value in the attribute of the To object. You can also enter a constant to fill this attribute with a constant value in every record of the To object.</td>
</tr>
</tbody>
</table>

8. Click **Save and Close**.
9. Specify the mapping file name in one of the following profile options:
   - Use the **Direct Lead to Opportunity Mapping** profile option to specify the mapping file name created when a direct lead is converted to an opportunity.
   - Use the **Partner Lead to Opportunity Mapping** profile option to specify the mapping file name created when a partner lead is converted to an opportunity.

### Modifying the Lead to Opportunity Copy Map: Worked Example

Copy maps are a declarative way to specify what fields are copied among objects. The functionality for converting a lead to an opportunity uses the predefined **Copy Lead To Opportunity Map** copy map feature. This worked examples shows you how to modify an existing mapping file to create an opportunity from a lead.

Predefined mapping files are available to you as part of your sales application. You can use copy maps to create leads and opportunities from responses. You can also create opportunities from deal registrations. In this example, you want to:

- Modify the lead to opportunity copy map
- Add a field to an opportunity
- Verify your changes

### Modifying the Lead To Opportunity Copy Map

To modify the Copy Lead to Opportunity Map:

1. Sign in as a user with Application Composer access and verify that you have an active active sandbox.
2. Access Application Composer by selecting **Application Composer** from the **Navigator** menu, under the **Tools** category.
3. In the **Application** field select Sales, and under **Advanced Setup**, select **Copy Maps**. The **Copy Maps** window appears.
4. Select the **Copy Lead To Opportunity Map**. The **Edit Copy Map** window appears.
5. In the **Entity Mappings** region, highlight the row that contains **From: Sales Lead** and **To: Opportunity**.
6. In the **Attribute Mappings** region, select the **Add** icon to add a new row.
7. From the **To**: drop-down list, select **Comments**.

   This value represents the Comments field in opportunities that contains the value.
8. In the **From Expression** field, enter the following Groovy expression:
   ```groovy
   return "Copy Map executed for Lead: "+nvl(LeadNumber,"";
   ```

   The expression uses text and the **LeadNumber** as the value to set into the opportunity **Comments** field.
9. Click **Save and Close**.

### Adding a Field to an Opportunity

The Comments field is not displayed by default on the Opportunities UI. Use **Application Composer** to add the Comments field to the opportunity header region as follows:

1. From **Application Composer**, expand and select **Objects, Standard Objects**, and then **Opportunity**.
2. Click **Pages** and then select the **Simplified Pages** tab.
3. On the Details Page Layouts section, edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.
4. Edit the **Summary** region.
5. Select the **Comments** field from the list in the **Available Fields** region and move it to the **Selected Fields** region.

   ![Add a Field to an Opportunity](image)

6. Click **Save and Close**.
7. Verify that the Summary region list contains the Comments field.
8. Click **Done**.
Verifying Your Changes

To verify your changes:

1. Navigate to the Application Composer UI with the same user access and sandbox details used to complete the Modify Lead to Opportunity Copy Map task.
2. Navigate to Leads and click Create Lead.
3. Enter Autumn Lead as the Name and select Pinnacle Technologies as the Account. Accept all other defaults values for the remaining fields.
4. From the Actions drop-down list, select Convert to Opportunity.
5. Click the Opportunities icon.
6. Locate the newly created opportunity. It must have the same name as the lead that was originally created. Examine the value in the Comments field. It contains the expected text, plus the lead number which originated this opportunity. The following figure shows an example of the Edit Opportunity page with the Comments field populated with the lead number.

Attribute Mapping When Converting Leads to Opportunities: Explained

This topic outlines the one-to-one mapping of the attributes between the lead and opportunity applications. When converting leads to opportunities, lead attributes, such as sales account, products, revenue amount, lead contacts, and other attributes, are mapped to the newly created opportunity.

You convert a lead to an opportunity when the lead is qualified and is ready for further processing along the sales cycle. The following sections outline:

- General lead attributes mapped to opportunities
- Partner lead-specific attributes mapped to opportunities
- Lead contact attributes mapped to opportunity contact attributes
• Lead product attributes mapped to opportunity revenue line attributes
• Profile options that specify the mapping file name for custom mapping files

General Lead Attributes Mapped to Opportunities
The following table lists the general lead attributes that are mapped to the corresponding opportunity attributes:

<table>
<thead>
<tr>
<th>General Lead Attribute</th>
<th>Opportunity Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Amount</td>
<td>Budget Amount</td>
</tr>
<tr>
<td>Budget Status</td>
<td>Budget check box</td>
</tr>
<tr>
<td>Customer</td>
<td>Target Party</td>
</tr>
<tr>
<td>Currency</td>
<td>Currency</td>
</tr>
<tr>
<td>Description</td>
<td>Description</td>
</tr>
<tr>
<td>Estimated Close Date</td>
<td>Estimated Close Date</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Expiration Date</td>
</tr>
<tr>
<td>Lead Number</td>
<td>Lead Number</td>
</tr>
<tr>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td></td>
<td>This attribute value is the Lead Name and the current date and time, which generates a unique opportunity name.</td>
</tr>
<tr>
<td>Owner</td>
<td>Owner of opportunity</td>
</tr>
<tr>
<td>Primary Contact</td>
<td>Key Contact</td>
</tr>
<tr>
<td>Source Code</td>
<td>Source</td>
</tr>
<tr>
<td></td>
<td>If a campaign or any other source creates a lead in which source code is used, then this attribute value is mapped.</td>
</tr>
</tbody>
</table>

Partner Lead Attributes Mapped to Opportunities
The following table lists the partner lead attributes that are mapped to the corresponding opportunity attributes:
Lead Contact Attributes Mapped to Opportunity Contact Attributes

To map lead contact attributes to opportunity contact attributes, the following relationships must apply between the contact and the customer:

- The relationship end date is later than the current date.
- The relationship start date is earlier than the current date.
- The relationship status is active.

The following table lists the lead contacts attributes that are mapped to the corresponding opportunity contacts attributes:

<table>
<thead>
<tr>
<th>Lead Contact Attribute</th>
<th>Opportunity Contact Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact</td>
<td>Contact</td>
</tr>
<tr>
<td>Contact Role</td>
<td>Contact Role</td>
</tr>
<tr>
<td>Primary</td>
<td>Primary</td>
</tr>
</tbody>
</table>

Lead Product Attributes Mapped to Opportunity Revenue Line Attributes

The following table lists the lead product attributes that are mapped to the corresponding opportunity revenue line attributes:

<table>
<thead>
<tr>
<th>Lead Product Attribute</th>
<th>Opportunity Revenue Line Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Amount</td>
<td>Revenue Amount</td>
</tr>
</tbody>
</table>
Profile Options for Mapping File Names

As an administrator, you can specify your own custom mapping file name to use for mapping objects and attributes during the lead-to-opportunity conversion process. For example, you can create custom lead attributes in Application Composer, Copy Maps, and can then add these attributes to the existing ready-to-use mapping files. You must save the custom mapping file using a unique file name and then specify the saved mapping file name in one of the following profile options:

- Use the Direct Lead to Opportunity Mapping profile option to specify the mapping file name created when a direct lead is converted to an opportunity.
- Use the Partner Lead to Opportunity Mapping profile option to specify the mapping file name created when a partner lead is converted to an opportunity.

Sales Users Access to Leads: Explained

This topic explains how the security reference implementation provided by Oracle determines who can access what lead information in your sales organization. Qualified leads are assigned to a sales team based on sales territories. Unqualified leads are assigned to individual lead qualifiers either manually or based on rules defined in the assignment manager engine. Whether or not you can access a particular lead depends on your membership in the resource and territory hierarchies.

You can access a lead if the following conditions apply:

- You are the lead owner.
- The lead owner or sales team member is your direct or indirect report in the resource hierarchy.
- You are a member of the lead sales team.
  Resources in the management hierarchy of a newly added lead sales team member have the same level of access to the sales leads as the team member.
- You are the owner or are a member of the territory assigned to the lead.
- You are the owner or member of an ancestor territory of the territory assigned to the lead.

The following figure illustrates some of the different ways you can gain access to a lead:

- Named agents in the diagram (A, B, and C) can access the lead.
- Unnamed agents (highlighted in yellow) cannot access the lead.
- Sales managers can access the lead because a salesperson in their management chain has access.

The following figure shows who in a sales hierarchy can access a sales lead. Access using accounts is not shown.

- Agent A can access the lead because agent A created it. When you create a lead, you are the initial owner.
- Agent B can access the lead because agent B is on the sales team.
• Agent C can access the lead because agent C is the owner of the NW territory.
• Sales managers who are higher up in the management chain can also see the lead because access is provided through the resource hierarchy. The manager of agent C can access the lead information, but colleagues of agent C do not have access to the lead.

Special Access
Not all access is affected by the management hierarchy and membership in sales teams or territories. For example, special access includes:

• Administrators: Administrators get access to leads and other objects. This access is based on their privileges, regardless of where the administrators are in the management hierarchy. Administrators do not have to be on the sales team or members of territories.
• Deal Registration: Salespeople assigned to a deal registration retain access even if they are moved to another deal registration.

Lead Ownership and Sales Team Resources: Explained
A market is typically organized into territories that comprise customers and prospects. Marketing is closely aligned with sales, and marketing activities are launched to generate leads and maintain the strength of the sales pipeline. This topic explains lead ownership and sales team resources.

When the lead doesn't have any owner, the sales representative can accept the lead which makes him or her the lead owner. All resources who are given access to leads get full access. Full access level allows the user to update the sales lead team by adding or removing individual resources. Hence, territory resources, sales team members and lead owner and resources in their hierarchy, all get full access. Territory team members inherit the access level of the territory. All members of sales territories assigned to the lead have full access to the lead. Ancestor territory owners of all sales territories assigned to the lead also have full access to the lead. Resources who access leads have different roles as follows:

• Operations
  Support an automated process to capture leads, prioritize leads for sales engagement, and distribute the leads to appropriate sales or territory team resources.
• Marketing and lead qualifiers
  Monitor leads, reassign leads, and continually review and adjust the lead quality.
• Sales and territory teams
  Enable lead qualification, perform follow-up lead activities, and convert leads to opportunities.

This topic includes the following sections:

• Lead, Sales, and Territory Resources
• Assignment of Leads to Marketing and Sales Resources
• Sales Resource Role

Lead, Sales, and Territory Resources
Sales resources are organized into flexible teams and are associated with the sales territories. These sales territories are then assigned to customers, leads, and opportunities to carry out the sales process. The lead follow-up team can include a
lead team comprised of individual sales resources who are predominantly active during the lead qualification stage. All sales resources who are assigned to the territory team can view and follow up the lead.

Assignment of Leads to Marketing and Sales Resources
Qualified leads are assigned to a sales team based on sales territories. Unqualified leads are assigned to individual lead qualifiers either manually or based on rules defined in the assignment manager engine. Users can be assigned to a lead in one of the following ways:

- Ownership through lead creation
- Territory-based lead assignment
- Rule-based sales team member assignment
- Manual selection of resources

Sales Resource Role
The sales resource performs the following activities:

- Review quality leads that are augmented with sales collateral, marketing content, customer contact interactions, and references.
- Qualify and assess the lead quality further with the help of customized assessment templates.
- Use the resource drop-down list to manually select a resource to add to the team.
  Include a description to indicate what role the resource has on the sales team. Many sales team members can access each lead, and each team member is identified as either an internal (sales force), or an external (channel partner sales force) resource. Each sales team member can be associated with a specific resource role to indicate what capacity the member has on the lead.
- Add additional contacts and products to the lead as the lead moves further down the sales cycle.

Sales Lead Team Examples
A sales lead team comprises assigned territories and individual team members. This topic provides examples that illustrate some of the features available for the sales lead team:

- Automate assignment of territories to lead territory team
- Automate assignment of individual resources to sales lead team
- Add ad hoc members to sales lead team
- Update access rights based on the resource
- Change the lead owner

Automate Assignment of Territories to Lead Territory Team
A lead exists with your company to purchase 50 large wind generator units in several Western Region states. To ensure that Western Region salespeople are assigned to the lead, your administrator uses the assignment manager capability to automatically add the Western Region territory to the lead territory team.
Sales departments arrange the sales force based on sales territories. Sales resources are organized into flexible teams and are associated with the sales territories. These sales territories are then assigned to customers, leads, and opportunities to carry out the sales process. A territory is the range of responsibility of salespeople over a set of sales accounts. Territories are assigned to sales accounts when the sales accounts are created. The sales lead team comprises:

- Assigned territories and special resources that are manually assigned to the team on an ad hoc basis.
- Resources that are added automatically through the automatic assignment of individual resources.

Automate Assignment of Individual Resources to Sales Lead Team

The sales lead team for your company wants to add a support person to the lead. Typically, support people are not part of any sales territory. You can use the Manage Sales Lead Assignment Rules area to set up a rule set group. For example, you can assign support team members as individual resources based on rules which match the lead product with specific support team members.

Add Ad Hoc Members to Sales Lead Team

Generally, sales team resources are automatically assigned to leads based on configured assignment rules. The following scenarios provide examples of when you may want to manually add additional team members to assist with the lead.

- The lead owner, who has full access to your company lead, wants to add one of his company’s contractual experts to his team to help pursue the lead. The lead owner manually accesses the resource drop-down list and selects the ad hoc resource that he wants to add to his team.

- When pursuing a lead for an insurance policy, the customer contact requests a unique and complex combination of policy components that require an expert in the company to review. The lead owner adds the expert resource to the lead with full access. Now the expert resource can update the lead with valid combinations of products and services, and, if required, add more team members to the team.

- A salesperson is pursuing a lead that requires the export of products outside the country. He wants to ensure there are no legal issues with exporting the products. The salesperson adds a member of their company’s legal counsel to the lead to review the details before contacting the customer again.

Update Access Rights Based on the Resource

When a resource is added to the sales lead team through rule-based assignment, a profile option determines the member’s default access level. Resources in the management hierarchy of a newly added team member have the same level of access to the sales leads as the team member.

All members of the sales territories assigned to the lead have full access to the lead. Owners of ancestor territories of all sales territories assigned to the lead also have full access to the lead.

Change the Lead Owner

Only the lead owner, or the resources in the management hierarchy of the lead owner, can change the ownership of the lead.
FAQs for Follow Up Leads

What happens if I delete a lead?

The marketing operations manager reviews retired leads periodically and deletes them from the application. From the Leads work area, select the retired leads that you want to delete, then select Delete from the Actions menu. Deleted leads are removed from the marketing application and are no longer available to lead qualifiers or sales representatives for lead follow-up.

> **Note:** Deleting a lead does not have any effect on the customer or response associated with the lead. Deleting a lead does not affect list membership of the customer associated with the lead.

What leads are displayed when I select My Open Leads?

Selecting the My Open Leads list in the Leads work area displays a list of all of the qualified and unqualified leads where you are listed as the lead owner and that were created within the last 90 days, or another number of days specified by the administrator in a system profile. You are automatically the lead owner if you create the lead or you can be designated as the owner by an application administrator.

What leads are displayed when I select Open Leads where I am on the team?

Selecting the Open Leads where I am on the team list displays a list of all of the qualified and unqualified leads where you are on the lead team. These leads were created within the last 90 days, or another number of days specified by the administrator in a system profile. You are on the lead team if you created the lead or you can be assigned to the team either by an automatic assignment process or by another team member.

What's a lead record set?

You can search leads by specific levels of data visibility by using the lead record set feature. A lead record set is a group of lead records considered as the base group before other search criteria is used to further refine the search results. It records visibility filters for leads search based on the resource and the leads for which the resource is associated to. For example, when searching Leads, you can select a value of Records I own in the record set. The data returned from that search includes only the leads that you own. If you select a value of Records in my territory, the search results include all of the leads in your territory, regardless of whether you own the lead.

Who can view the record sets for leads for saved searches?

The different record sets provided in the Saved Searches window restrict your saved searches to different sets of leads.
The following table lists and describes the record sets for leads. Not all record sets are available to all users. For example, the record sets involving subordinates are available only to managers.

**Tip:** To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records in your territory hierarchy. Or restrict your searches to a smaller geographical area. For example, search all the leads in one state instead of the whole country.

<table>
<thead>
<tr>
<th>Record Set Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>I own</td>
<td>Leads you own, including those leads you created or where ownership is assigned to you.</td>
</tr>
<tr>
<td>I am on the team</td>
<td>Leads where you are on the lead team. You are on the lead team if you are the lead owner or were added as a member by another team member.</td>
</tr>
<tr>
<td>My territory</td>
<td>Leads in your sales territories.</td>
</tr>
<tr>
<td>My subordinates own</td>
<td>Leads where you or your subordinates are on the lead team.</td>
</tr>
<tr>
<td>My territory hierarchy</td>
<td>Leads in your sales territories and all of their subordinate territories in the sales territory hierarchy.</td>
</tr>
<tr>
<td>All records I can see</td>
<td>Leads that you can view based on your lead team membership, sales territory assignments, your position in the organization, and security permissions.</td>
</tr>
</tbody>
</table>

Why did the deal size change?

The deal size is automatically determined by the products entered for the lead. When you add or remove products for a lead the deal size is recalculated. You can override the calculated amount after all products are entered. For example, if the lead is eligible for a discount, you can manually change the total of the deal size to apply the discount. However, the application overrides the deal size total if you add or remove a product from the lead after having manually adjusted the deal size. In this case, you have to reapply the manual change.

What happens if I manually change a lead rank that was automatically assigned?

Lead rank suggests a priority to help you select leads for follow up. When the lead is created, a lead rank is first calculated by the assignment manager engine based on ranking rules. You can select a different lead rank from the list in the UI. When the lead is further processed, a different rank may be assigned based on enriched lead data, or the rules may cause the lead to revert to its original rank.
How can I add lead contacts to my sales campaign?
From the Leads overview area, select the lead you want to be part of your sales campaign. From the Lead details page, click the Contacts tab. Select the contacts that you want to add to your sales campaign. From the Actions menu, select Add to Sales Campaigns to view and select a campaign from your saved campaigns. Your selected contacts are notified either when you launch your sales campaign or at the next scheduled mailing if you set up your sales campaign to repeat.

How can I check for duplicate leads?
As a sales representative you want to know if your leads for new contacts or accounts have any duplicates in the application. You can manually check for leads duplicates from the edit leads page. Select the lead that you want to check and from the Actions menu, select Duplicate Check. Duplicate check can only be run on new (non-existing) contacts and accounts.

A message is displayed if no duplicates are found for new contacts or accounts. If potential duplicates exist, the Resolve Duplicates page is displayed for the contact or account where you can select the appropriate contact or account to resolve any duplicates.

What's the difference between lead qualification and lead assessment?
Lead qualification determines whether a lead has a budget and project timeline defined, and indicates if someone with purchasing authority is identified. Company-specific standard questions and the associated scoring mechanism help to capture the additional data critical to qualifying leads. A lead is typically considered qualified when the need and purchase interest are confirmed.

Lead assessment helps in the lead follow-up process, where the salesperson continues to assess the lead quality and lead conversion potential through preconfigured assessment templates. From the Assessment tab, the salesperson can conduct a new assessment, view completed assessments, and view the responses to the questions. Assessment templates provide the mechanism for the salesperson to analyze the lead and suggest appropriate next steps based on the overall assessment score and feedback for the lead.

Related Topics
- Assessment Template Score Range: How It's Calculated

What's the difference between a task, an interaction, and an appointment?
A task is a unit of work to be completed by one or more people. Tasks are related to business objects such as opportunities or contacts, and can include attachments.

An appointment is a calendar entry related to a business object such as an opportunity or a customer. Appointments can include attachments.

An interaction provides a historical view of all communications initiated by you to a customer, or by a customer to you. Interactions do not document internal communications.
Why was a customer reference displayed for my lead?

A customer reference is based on the customer industry and associated lead product or product group related to the specific lead. For example, a customer reference displays for your lead if a customer has purchased a similar product or service. You can leverage the reference details for effective lead follow-up.

The leads UI is designed to ensure that you are productive and can readily access related lead information with as few clicks as possible. Supporting data related to each lead is included in the contextual area for easy reference. It includes references to all open leads and open opportunities for the lead customer, as well as supporting collateral. This information is useful to the lead sales team to facilitate an effective lead follow-up.

What happens if I convert a lead to an opportunity?

You convert a lead to an opportunity when the lead is qualified and is ready for further processing along the sales cycle. Once the conversion is successfully completed, you can review the newly created opportunity using the opportunities UI. During your review, you might want to retain only a select few lead product lines to pursue as revenue on the opportunity. Since the conversion process automatically creates product lines (representing revenue) from all lead lines, you can remove unwanted product lines from the opportunities UI.

You can view opportunities associated with leads in the leads UI. When you convert a lead to an opportunity, the following rules may apply depending on the setup criteria for your company:

- The person converting the lead becomes the primary sales team member for the opportunity.
- The customer reference on the original lead is maintained for the opportunity.
- The associated lead team members are copied with the same primary team member.
- The newly created opportunity is assigned to the appropriate sales territories.

Can I create more than one opportunity from a single lead?

Yes, you can convert the same lead into another opportunity and then delete unwanted product lines. For example, during your review of an opportunity, you decide you want to retain only a select few of the lead product lines to pursue as opportunity revenue. Since the conversion process automatically creates the product lines from all lead lines, you can remove unwanted product lines from the opportunity details page. You can, at a later stage, create another opportunity from the removed lead product lines by converting the lead to an opportunity again. You can then decide to keep only those product lines that you want on the newly created opportunity.

Why can't I see converted leads in my list of opportunities?

If you don't see the converted lead in your list of opportunities, this means that the opportunity is assigned to a different territory.
Can I perform a mass update for leads of different business units?

You can’t perform a mass update of modified values for leads that apply to different business units. A dialog box is displayed if the selected leads belong to different business units which do not share the same reference data sets. You must remove the set-enabled attribute for the offending leads and perform the mass update only for leads with business units containing the same reference data sets. For more information on reference data sets, see the topic Business Units and Reference Data Sets: How they Work Together. Also, consult the online help, using keywords "reference data".

Can I transfer lead records owned by one user to another user?

Yes. A record owner or any user above the sales lead owner in the role or territory hierarchy can use the Mass Transfer feature to transfer lead records from one user to another user. For example, use Mass Transfer to move all sales leads from a current owner to a new owner.

When the transfer of sales lead records owned by one user to another user is completed, the current owner is removed from the sales lead team and all the sales lead records are moved to the new owner. If the new owner is already on the team, then he or she becomes the owner. If the new owner was not previously on the team, he or she is added to the team and becomes the owner. The new owner has the same access level and function as the previous owner.

**Related Topics**

- Transferring Records Between Users: Explained
- Transferring Records Between Users: Procedure

How is a lead score calculated?

A lead score is calculated during lead assignment. You can associate a value with each lead based on weighted criteria and scoring attributes appropriate to your organization. For example, you can set up a simple scoring calculation rule based on a lead attribute such as deal size. Or you can use a combination of attributes such as time frame, deal size and budget status. Setting up lead scoring also depends on whether data is available for some attributes or not. For example, at the initial stages, a lead that has a contact number may get a score of 100 points. If a time frame is entered, the lead score may get an additional 200 points. As a salesperson nurtures the lead and enters additional lead data, the score is automatically recalculated to reflect the latest score. By giving a numeric value to each lead, a salesperson can prioritize their lead lists and focus on those leads with the greatest score value.
Glossary

candidate object
A candidate object is a business object, such as a resource or a territory, that is associated with one or more work objects for eventual assignment. Creating a candidate object involves entering its application information and selecting its attributes to use in rules or mappings.

deal size
Total monetary amount the customer is expected to spend.

external system or external application
A system or application that is external to and not part of Order Management. An order capture system that resides upstream of Order Management is an example of an external system. A fulfillment application that resides downstream of Order Management is an example of an external application.

infolet
A small, interactive widget on the home page that provides key information and actions for a specific area, for example social networking or your personal profile. Each infolet can have multiple views.

interface table
A database table that stores data during data transfer between applications or from an external system or data file.

lead
A new prospect or existing customer who has interest or the potential for interest in a product or service being sold. The interest is represented in the application by a lead.

lead rank
A configurable set of values such as hot, warm, or cool used to prioritize leads for lead qualification and sales engagement.

marketing list
A static selection of contacts for the purpose of communicating a marketing message by e-mail, direct mail or phone.

qualified lead
A qualified lead is one where the lead qualification status has been updated to qualified. Generally, a lead is considered qualified and ready for conversion to a sale when the need, purchase interest, and budget are confirmed.
response
A recorded reaction of a prospect or customer to a marketing activity.

sales campaign
A sales campaign enables a salesperson to target customer contacts by e-mail in a personalized campaign, using marketing generated collateral.

springboard
The grid of icons on the home page or the strip of icons above all simplified pages. Use the icons to open pages.

work object
A work object is a business object that requires assignment, such as a lead or an opportunity. Creating a work object involves entering its application information, selecting its attributes to use during assignment, and associating one or more candidates.