Oracle Sales Cloud
Using Sales for Communications

Release 13 (update 18B)
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</table>
Preface

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

Using Oracle Applications

Using Applications Help

Use help icons to access help in the application. If you don’t see any help icons on your page, click your user image or name in the global header and select Show Help Icons. Not all pages have help icons. You can also access Oracle Applications Help.

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

You can also read Using Applications Help.

Additional Resources

- **Community:** Use Oracle Cloud 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.

Conventions

The following table explains the text conventions used in this guide.

<table>
<thead>
<tr>
<th>Convention</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>boldface</td>
<td>Boldface type indicates user interface elements, navigation paths, or values you enter or select.</td>
</tr>
<tr>
<td>monospace</td>
<td>Monospace type indicates file, folder, and directory names, code examples, commands, and URLs.</td>
</tr>
<tr>
<td>&gt;</td>
<td>Greater than symbol separates elements in a navigation path.</td>
</tr>
</tbody>
</table>

Documentation Accessibility

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

Videos included in this guide are provided as a media alternative for text-based help topics also available in this guide.
Contacting Oracle

Access to Oracle Support
Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit My Oracle Support or visit Accessible Oracle Support if you are hearing impaired.

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

Audience and Scope

This guide is intended for sales representatives and sales managers who are involved in using Oracle Sales Cloud for Communications.

This guide describes how sales representatives can manage customer information, account profiles and opportunities, and integrate with Configure-Price-Quote solutions to create proposals, renew contracts, track revenue, and view key performance indicators.

Related Guides

Refer to the related guides listed in the following table to understand more about the business flows and functions covered in this guide.

<table>
<thead>
<tr>
<th>Guide</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Oracle Sales Cloud Using Sales</td>
<td>Describes user tasks to help sales managers, salespeople, and other sales end users perform day-to-day business tasks.</td>
</tr>
<tr>
<td>Oracle Sales Cloud Implementing Sales</td>
<td>Describes tasks to configure and set up Sales.</td>
</tr>
</tbody>
</table>

Related Topics

- Oracle Help Center
2 Overview

Communications Overview

This topic provides an overview of communications with a brief insight into its key features and functions. Communications enables you to view and manage your customer information, manage account profiles and opportunities, and integrate with Configure-Price-Quote solutions to develop proposals, renew contracts, track revenue, and view key performance indicators. Described below are the key features with an insight into how each feature enables you to perform key tasks.

Account Classes and Profiles

Classify accounts according to your customer’s requirements and organizational structure and use the various available profiles to gather and store specific information for an account or a contact, for example, billing, financial, exemption, or fraud details.

- Use a Billing profile to store billing information for services provided to a customer.
- Use a Financial profile to store financial information and perform a credit check.
- Use an Exemption profile to list customer subsidy and exemption-related information.
- Use a Fraud profile to identify fraudulent charges extended to a customer.

For further information on how you can work with profiles, see the Managing Account Classes and Profiles chapter in this guide.

Assets

View customer assets and key asset attributes to locate a communications subscription that is either contracted by, serviced to, or paid by an account, and view the subscription details.

Subscription assets are managed throughout their life cycle with service upgrade, downgrade, renewal, suspension, and termination. They are also subject to customer inquiries which you may need to address and accordingly manage service requests. You can also locate a customer asset to move, add, change, or disconnect a subscription service at a customer request.

For further information on assets, see the Managing Assets chapter in this guide.

Integration

Turn on or turn off the Oracle Sales Cloud for Communications integration with Siebel CRM as required. The preconfigured integration supports sales activities for contracts and enables you to:

- Create quotes in the Siebel Full Application window deployed from Oracle Sales Cloud.
- Review contract renewal opportunities automatically created from expiring agreements in Siebel CRM.
- Review key performance indicators to attain a sales quota and to evaluate the sales performance of your team.
- Share addresses among accounts and contacts and ensure that a new record is not created when a record with the given address already exists.
• Modify quotes in Siebel CRM and use the Update Opportunity function to update the corresponding opportunity in Oracle Sales Cloud.

For further information on integration, see the Using Sales Cloud with Siebel CRM chapter in this guide.

Dashboard

Configure the sales configurable home page to review and choose from the default communications infolets that you want to work with.

You can modify and use dashboards to view the key sales performance indicators and analytical details on communications contract renewals, new contracts, stalled deals, actual versus quota, and bundled products.

Business Flows

This topic describes sample business flows in communications.

The two sample business flows described in this topic are creating contracts from opportunities and generating new opportunities from existing services.

Creating Contracts from Opportunities

The sales agent generates new contracts from opportunities in the following way:

• Opens the list of assigned opportunities and reviews the opportunity details.
• Reviews current customer contracts and assets, history of service requests and activities, product recommendations, and account details.
• Updates the account financial, billing, exemption, or fraud profiles as requested by the customer.
• Creates quotes and generates a corresponding proposal based on the recommended products and perceived customer needs.
• Negotiates and gets the customer to sign a contract for the proposed products.
• Reviews the sales KPI for quota attainment.
The following graphic illustrates how a contract is created from opportunities.

**Create Contracts from Opportunities**

1. Review opportunity details
2. Review customer assets, contracts, service requests, product recommendations, activities, and account details
3. Update customer profiles
4. Create quotes and generate proposal
5. Generate contract and create order
6. Customer accepts proposal?
7. No
8. Yes
9. Review quota attainment KPI

---

**Generating Opportunities from Existing Services**

The account representative generates new opportunities from existing services in the following way:

- Searches customer assets for a service scheduled for maintenance.
- Reaches out to customer contacts listed on the asset and informs of possible service impact.
- Reviews current service details with the customer and discusses possible modification and service upgrade options.
- Creates a new opportunity based on the customer response.
The following graphic illustrates how an opportunity is created from existing services.

- **Account Representative**
  - Review maintenance events
  - Search customer assets for impacted customers
  - Reach out to customer contact for the asset
  - Propose service upgrade options

- **Customer**
  - Review service details, inform of maintenance impact, and discuss service modifications
  - Customer interested?

- **Create opportunity based on customer response**

The process involves reviewing maintenance events, searching for impacted customers, reaching out to the customer contact, proposing service upgrades, and then creating an opportunity based on the customer's response.
3 Managing Account Classes and Profiles

Overview

This topic provides a brief overview of how accounts are classified and profiles are allocated in communications. Account classes enable you to classify accounts based on the account position and role in an account hierarchy. For example, the customer, person, or organization that is receiving service is classified as the owner class. The class that you assign to an account determines its profiles.

The following are the available account classes:

- Owner Class
- Service Class
- Billing Class
- Service Aggregator Class
- Billing Aggregator Class

Use profiles to gather and store specific information for an account or a contact. For example, a billing profile contains the information needed to invoice the customer for products and services. The following are the available profile types:

- Billing Profile
- Financial Profile
- Fraud Profile
- Exemption Profile

Classifying Accounts

You can assign an account class to each new account according to your customer’s requirements and organizational structure.

For example, a service can be delivered to one subsidiary while bills are sent to another subsidiary. Separate accounts are created for each subsidiary:

- The service class account is used to designate the entity that is receiving the service. It can used in quotes and for analyzing a customer usage history.
- The billing class account is used to designate the entity that settles the financial transactions associated to the service.

Salespeople can create parent-child associations irrespective of the account class. For example, an owner account can be placed anywhere in the hierarchy and a billing account can be the parent or the child of a service account.

Account Class Types

The following table describes the types of account classes.
### Using Billing Profiles

This topic describes how you can use the billing profile to gather information such as type of billing, payment method, billing frequency, bill type, billing cycle, and so on. A billing profile may also contain information synchronized with an external billing application. The billing profile information can be submitted to a back-office application for bill processing. Associating a billing profile to an account is optional.

When you invoice an account for products and services, the account is known as the billing account for the products and services. An account can have more than one billing profile that can be used for different products and services. You can create billing profiles for all account classes.

### Associating a Billing Profile with an Account

An account can have multiple billing profiles. If you have multiple profiles, you can create a primary profile from one of them. However, creating a primary billing profile is optional.

To associate a billing profile to an account:

1. Navigate to **Sales > Accounts**.
2. From the Accounts page, select the account.
4. On the Edit Account: Account: Billing Profiles page, click **Create**.
5. On the Create pop-up window, fill in the required information for the fields.
6. Click **Save and Close**.
7. If you select Prepaid in the Payment Type field, the relevant Top-Up fields are enabled. Enter the replenishment details for the account.
8. Click **Save**.

The following table describes the fields on the Billing Profiles page.

<table>
<thead>
<tr>
<th>Account Class</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Owner Class</td>
<td>Qualifies the customer, person, or organization that is contractually responsible for the service. An owner class account can also receive both service and bills.</td>
</tr>
<tr>
<td>Service Class</td>
<td>Qualifies the person or organization who receives or uses the service but not bills.</td>
</tr>
<tr>
<td>Billing Class</td>
<td>Qualifies the account settling the financial transactions related to the purchase and use of a service. Used to invoice the customer for products and services utilized for a specified time frame and for which the customer must make a payment.</td>
</tr>
<tr>
<td>Service Aggregator Class</td>
<td>Receives aggregate usage details for all of its subsidiary accounts. It can be anywhere in the account hierarchy.</td>
</tr>
<tr>
<td>Billing Aggregator Class</td>
<td>Receives aggregate billing details for all of its subsidiary accounts. It can be anywhere in the account hierarchy.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Name</td>
<td>Indicates the unique name of the billing profile across accounts. You can define the name of a billing profile record. An error message is displayed if you enter a non-unique value. This is a required field.</td>
</tr>
<tr>
<td>Primary</td>
<td>If checked, indicates that this profile is the most commonly applicable profile for the customer. Each account can have only one primary profile.</td>
</tr>
<tr>
<td>Bill Cycle</td>
<td>Indicates when the bill cycle occurs.</td>
</tr>
<tr>
<td>Bill Cycle Day</td>
<td>Indicates the day of month on which the bill cycle occurs.</td>
</tr>
<tr>
<td>Billing Type</td>
<td>Indicates whether the type of billing is detail or summary.</td>
</tr>
<tr>
<td>Billing Frequency</td>
<td>Indicates the interval in which you bill the customer for service.</td>
</tr>
<tr>
<td>Billing Account Number</td>
<td>Indicates the billing account number for a profile.</td>
</tr>
<tr>
<td>Collections</td>
<td>Indicates that the customer has not paid bills for some time and the account has been placed in collection. Collection agencies may have been contacted to retrieve the due balance.</td>
</tr>
<tr>
<td>Contact</td>
<td>Indicates the contact for a billing profile.</td>
</tr>
<tr>
<td>Address</td>
<td>Indicates the address where bills are sent. If an address isn’t selected during creation, then this is set to the account primary address. The address drop-down list displays only account-related addresses. You can select only the account’s address for this field.</td>
</tr>
<tr>
<td>Formatted Address</td>
<td>Displays the formatted text for the billing profile address. This is a read-only field that is based on the address field.</td>
</tr>
<tr>
<td>Comments</td>
<td>Enter additional comments, if required.</td>
</tr>
<tr>
<td>External Billing Account Number</td>
<td>Indicates the external billing account number of a billing profile.</td>
</tr>
<tr>
<td>Language</td>
<td>Indicates the language that is used in an invoice.</td>
</tr>
<tr>
<td>Bill Media</td>
<td>Select a media that generates a bill for a billing profile, for example: Disk, Email, CD-ROM, and Paper.</td>
</tr>
<tr>
<td>Payment Type</td>
<td>Select Postpaid if the customer has signed a contract and is being invoiced for service received. Select Prepaid when services are only provided if they are paid for in advance. If you select Prepaid, the relevant fields are enabled in the same form. For example, Prepaid Automatic Top Up, Prepaid Threshold Amount. If you select Postpaid, the Billing Profile Prepaid field values are reset during Save and Close.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Payment Method</td>
<td>Select the method of payment. The values are Bill Me, Cash, Check, Credit Card, Debit Card, Invoice, and Other.</td>
</tr>
<tr>
<td>Prepaid Automatic Top-Up</td>
<td>Select to indicate that the account is automatically replenished. Customer replenishment instructions are captured on other fields. The check box is disabled if the payment type is specified as Postpaid.</td>
</tr>
<tr>
<td>Prepaid SMS Notification</td>
<td>Indicates whether you require a short message service notification for the contact when a prepaid event occurs, such as an automated payment or a reached threshold. The check box is disabled if the payment type is specified as Postpaid.</td>
</tr>
<tr>
<td>Prepaid Threshold Amount</td>
<td>Indicates the prepaid threshold amount. When the measured use of the service reaches the amount, the account must be replenished. The field is disabled if the payment type is specified as Postpaid.</td>
</tr>
<tr>
<td>Prepaid Threshold UOM</td>
<td>Indicates the unit of measure for the threshold amount, for example, minutes or currency. The field is disabled if the payment type is specified as Postpaid.</td>
</tr>
<tr>
<td>Prepaid Top-Up Amount</td>
<td>Indicates the amount by which the account must be replenished. The field is disabled if the payment type is specified as Postpaid.</td>
</tr>
<tr>
<td>Prepaid Top-Up Frequency</td>
<td>Indicates the interval between automated replenishment, as selected by the customer. The field is disabled if the payment type is specified as Postpaid.</td>
</tr>
<tr>
<td>Prepaid Top-Up UOM</td>
<td>Indicates the unit of measure for the top-up amount. The field is disabled if the payment type is specified as Postpaid.</td>
</tr>
<tr>
<td>Statement</td>
<td>Indicates if a statement is required.</td>
</tr>
<tr>
<td>Status</td>
<td>Indicates the status of a billing profile.</td>
</tr>
</tbody>
</table>

**Using Financial Profiles**

This topic describes how you can use the financial profile to perform a credit check on your customer. When you create an account, you define the financial profile for that account. A financial profile provides details such as bank information, credit rating, and D-U-N-S number.

A financial profile uses third-party credit checks to send the account name and D-U-N-S number and to return the credit rating. An account can have only one financial profile.

You can configure credit check using the credit bureau’s Web service WSDL, user name, and password. A credit check applies to a business or an individual and may require business name, billing address, corporate ID, and tax ID. To run a credit check, the financial profile information is sent to an external application that reports a credit rating. The credit rating is
typically produced by a credit bureau and qualifies the customer’s ability to pay. This credit rating helps companies to assess their risk before agreeing to credit terms with a potential customer.

Viewing and Editing a Financial Profile

This topic describes how you can view and edit a financial profile of an account.

To view and edit a financial profile:

1. Sign in as a sales representative, sales manager, or sales VP.
2. Navigate to Sales > Accounts.
3. On the Accounts page, select an account.
4. On the Edit Account: Account: Overview page, click the Profile subtab.

The financial profile of the account is displayed.

6. View or edit the fields as required and click Save and Close.

The following table describes the fields in the Financial Profile region.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Profile Contact</td>
<td>The contact for the account financial profile.</td>
</tr>
<tr>
<td>Taxpayer Identification Number</td>
<td>Business number that is provided by a state, county, or city government.</td>
</tr>
<tr>
<td>Legal Entity</td>
<td>Legal name of the company or corporation.</td>
</tr>
<tr>
<td>Tax Profile Code</td>
<td>Code from standard tax categories that classify companies according to their tax aspects.</td>
</tr>
<tr>
<td>D-U-N-S Number</td>
<td>The Dun and Bradstreet Number.</td>
</tr>
<tr>
<td>Bank Branch Name</td>
<td>Indicates the branch name of the bank.</td>
</tr>
<tr>
<td>Bank Name</td>
<td>Indicates the name of the bank.</td>
</tr>
<tr>
<td>Credit Score</td>
<td>Credit rating of the customer.</td>
</tr>
<tr>
<td>Credit Agency</td>
<td>The group that performed the most recent credit rating.</td>
</tr>
<tr>
<td>Credit Update Date</td>
<td>The date when the last credit check was performed.</td>
</tr>
<tr>
<td>Credit Updated By</td>
<td>Indicates the person who last requested a credit check.</td>
</tr>
</tbody>
</table>
Using Fraud Profiles

This topic explains how to create fraud profiles for an account that can be used along with a back-end fraud management system.

There are possibilities of frauds occurring during the usage of services. For example, a customer may identify unauthorized calls on the bill as a fraud. If your application is integrated with a back-end fraud management system, the fraud profile for the account can be used to generate fraud alert in such cases of fraudulent charges.

Sales representatives create fraud profiles on behalf of their customers. Sales managers and sales VPs are also authorized to create and update fraud profile for the account.

Note: You cannot delete a fraud profile once it has been created.

Viewing and Editing a Fraud Profile

The following topic describes how you can view and edit a fraud profile of an account.

To view and edit a fraud profile:

1. Sign in as a sales representative, sales manager, or sales VP.
2. Navigate to Sales > Accounts.
3. On the Accounts page, select an account.
4. On the Edit Account: Account: Overview page, click the Profile subtab.
5. On the Edit Account: Account: Profile page, expand Fraud Profile. The fraud profile of the account is displayed.
6. View or edit the fields as required and click Save and Close.

The following table describes the fields in the Fraud Profile region.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Call Duration</td>
<td>Maximum time duration that is allowed for one call.</td>
</tr>
<tr>
<td>Maximum Calls</td>
<td>Maximum number of calls that the customer can make in a given period.</td>
</tr>
<tr>
<td>Maximum Cost</td>
<td>Maximum cost of the calls, in the appropriate currency.</td>
</tr>
<tr>
<td>Daily Threshold</td>
<td>Number of calls that a customer can make in a day.</td>
</tr>
<tr>
<td>Domestic Threshold</td>
<td>Number of domestic calls that a customer can make.</td>
</tr>
<tr>
<td>International Threshold</td>
<td>Number of international calls that a customer can make.</td>
</tr>
<tr>
<td>Credit Threshold</td>
<td>Amount of credit that is allowed for the account.</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Sensitive Number Threshold</td>
<td>Number of calls that a customer can make to sensitive numbers. Sensitive numbers might include high-priced calls, such as calls to 900 numbers.</td>
</tr>
<tr>
<td>Percentage Overflow</td>
<td>Percentage of overflow that is allowed for specific thresholds in external applications.</td>
</tr>
</tbody>
</table>

Using Exemption Profiles

This topic describes how you can use the exemption profile of an account to view the subsidy and exemption-related information of a customer. As a sales representative, you can create an exemption profile for an account and provide information for the exemption types that your customer is eligible for.

> **Note:** Exemption profile is available only when the Siebel CRM integration is turned off.

Exemption Types

The exemption profile of an account records data for the following exemption types:

<table>
<thead>
<tr>
<th>Exemption Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tax</td>
<td>Nonprofit, charitable, and some supplier organizations may be exempt from federal or local taxes.</td>
</tr>
<tr>
<td>Directory Assistance</td>
<td>Customers with specific disabilities may be exempt from dialing assistance service fees.</td>
</tr>
<tr>
<td>Phone Assistance</td>
<td>Customers with low income may be provided with reduced cost of phone lines. The eligibility criteria varies depending on the country, state, and city regulations.</td>
</tr>
</tbody>
</table>

You can configure your instance of Oracle Sales for Communications to add exemption types that are relevant to your local government regulations and company policies and remove the ones that do not apply to you.

Viewing and Editing an Exemption Profile

This topic describes how you can view and edit the information provided in the exemption profile of an account in communications.

To view and edit an exemption profile:

1. Sign in as a sales representative, sales manager, or sales VP.
2. Navigate to **Sales > Accounts**.
3. On the Accounts page, select an account.
4. On the Edit Account: Account: Overview page, click the **Profile** subtab.
5. On the Edit Account: Account: Profile page, expand **Exemption Profile**.
The exemption profile of the account is displayed.

6. View or edit the fields as required and click **Save and Close**.

The following table describes the fields in the Exemption profile region.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>State Seller Tax Permit or License Number</td>
<td>Identification number of the tax permit or business license</td>
</tr>
<tr>
<td>Nonprofit Organization</td>
<td>Check box indicating whether the customer is a qualified nonprofit organization</td>
</tr>
<tr>
<td>Directory Assistance Status</td>
<td>Status indicating whether a customer has requested or has been granted an exemption for directory assistance</td>
</tr>
<tr>
<td>Directory Assistance Start Date</td>
<td>Start date of the directory assistance exemption</td>
</tr>
<tr>
<td>Phone Assistance Exemption</td>
<td>Check box indicating the exemption status of a customer for phone assistance</td>
</tr>
<tr>
<td>Phone Assistance Request Date</td>
<td>Date on which the phone assistance was requested</td>
</tr>
<tr>
<td>Phone Assistance Renewal Date</td>
<td>Date when the phone assistance program must be renewed</td>
</tr>
<tr>
<td>Phone Assistance Start Date</td>
<td>Start date of the phone assistance program</td>
</tr>
</tbody>
</table>
4 Sharing Addresses Among Accounts and Contacts

Sharing Addresses Among Accounts and Contacts

This topic describes how you can create multiple accounts or contacts with the same address, synchronize, and then associate them with the existing Siebel CRM address records.

Two different accounts or contacts can share the same address when address line 1, address line 2, city, state, postal code, and country are the same. If an existing address of another account or contact is used, then the newly created address in Oracle Sales Cloud is deactivated and the existing address is reused.

When you create a new record, you can choose to:

- Share addresses between accounts and contacts.
- Select an existing address from Siebel CRM.
- Ensure that a new record isn’t created, when an address record with the given address already exists.

Enabling or Disabling Sharing Addresses Function

When you create a contact or an account with a new address in Oracle Sales Cloud, the address is created in the database. You can either enable shared addresses to ensure that addresses created in Oracle Sales Cloud are shared between accounts and contacts, or disable the same to ensure that addresses are no longer shared between accounts and contacts.

To enable or disable shared addresses:

1. Click Navigator > Tools > Integration Configuration on the home page.
2. Set the value of the key SHARE_ADDRESSES_ACCOUNTS_CONTACTS to Y or N.
3. Click Save and Close.
5 Managing Assets

Overview

This topic describes customer assets in communications. Customer assets refer to the products and services that customers acquire from a communications service provider. For example, assets refer to the bundle of services that a customer has purchased which include a wireless service with a specific data plan, domestic and international roaming options, a phone with various levels of data storage, as well as home internet services, landline services, TV media subscriptions, and so on.

Assets Attributes

Assets are characterized by a number of attributes whose values are defined through order fulfillment. Additional attributes are managed by a sales representative or service agent to describe the location of a physical asset at a premise or to identify a customer contact to reach out for asset-related issues.

The following table describes the communications attributes created for assets and which can be viewed in either List or Detailed view.

<table>
<thead>
<tr>
<th>Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Asset Number</td>
<td>Instance of the parent product in the asset product structure.</td>
</tr>
<tr>
<td>Root Asset Number</td>
<td>Instance of the root product in the asset product structure.</td>
</tr>
<tr>
<td>Service Account Name</td>
<td>Name of the account using the asset.</td>
</tr>
<tr>
<td>Service Address</td>
<td>Address where the service is provided.</td>
</tr>
<tr>
<td>Billing Profile ID</td>
<td>Unique identifier for the billing profile associated to the asset.</td>
</tr>
<tr>
<td>Billing Account Name</td>
<td>Name of the account paying for the use of the asset.</td>
</tr>
<tr>
<td>Billing Profile Name</td>
<td>Name associated with the billing profile ID.</td>
</tr>
<tr>
<td>Location Description</td>
<td>Physical location of the assets.</td>
</tr>
</tbody>
</table>

Note: In addition to the Dynamic Choice List field, ensure that the Service Account Name text field is populated when importing assets.

Note: In addition to the Dynamic Choice List field, ensure that the Billing Account Name text field is populated when importing assets.
<table>
<thead>
<tr>
<th>Attribute in Oracle Sales Cloud for Communications</th>
<th>Attribute in Oracle Sales Cloud</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Service ID</td>
<td>Serial Number</td>
<td>Public, non-unique ID for the product instance. For example, phone number or serial number.</td>
</tr>
<tr>
<td>Service End Date</td>
<td>End Date</td>
<td>Date on which the service contract ends.</td>
</tr>
<tr>
<td>Service Start Date</td>
<td>Start Date</td>
<td>Date on which the service contract starts.</td>
</tr>
<tr>
<td>Usage Net Charge Per Unit</td>
<td>Purchase Unit Price</td>
<td>Variable usage price for the product.</td>
</tr>
</tbody>
</table>

### Related Topics

- Defining Bulk Export Process: Procedure
- Configuring Assets
- Setting Up Sales Assets: Overview
Managing Assets

This topic describes how you can create and modify assets in communications.

Creating an Asset

An asset in communications is created in Oracle Configure Price Quote (CPQ) upon the completion of an order fulfillment process. Oracle CPQ enables accurate order capture and priced quote generation for the purchase and modification of complex subscription products and services.

The following section describes an asset creation workflow:

- Customers accepts a proposal or requests the provisioning of new communications services
- Sales agent generates an order from the proposal or customer request
- Sales agent submits the order to order orchestration for fulfillment
- Service is set up in a charging and invoicing solution
- Service is activated on the communications network
- Physical goods are shipped, such as a phone to the customer
- Asset data is shared and accessed as needed by sales, service, and marketing agents

The following graphic illustrates an asset creation workflow:

For details on configuring assets, refer to the Configuring Assets topic in the Oracle Sales Cloud Getting Started with Communications Implementation guide.
Editing an Asset

Similar to asset creation, an asset modification order is also submitted for fulfillment, where the asset modifications are implemented. On successful implementation, assets are updated and displayed in Oracle Sales Cloud.

Assets are subject to various modifications during the lifetime of the subscription. Customers may move, add, change, disconnect, suspend, resume, upgrade, or downgrade services. Such modifications are captured in an Oracle CPQ order. To generate a modify order request on a user-selected date, Oracle CPQ displays the state of the asset on that date; Oracle CPQ achieves this by applying open orders which have been previously submitted and must be provisioned prior to that date. The user can then select the desired modifications to the subscription and generate the modify order in Oracle CPQ.

You can search for an asset from the List page of Assets or from any of the Accounts subtabs, such as Owned Assets, Billing Items, or Installed Assets.
6 Enabling or Disabling Siebel CRM Integration

Enabling the Siebel CRM Integration

Oracle Sales for Communications uses the Siebel CRM integration for accounts, contacts, opportunities, and quotes. Before you configure a third-party integration, you must disable the Siebel CRM integration.

To enable a unidirectional integration for accounts and contacts:

1. Click Navigator > Tools > Integration Configuration.
2. Set the value for key SYNC_TO_SBL_ACCOUNTS_CONTACTS to Y.
3. Click Save and Close.

To enable the integration for opportunities and quotes:

1. Click Navigator > Tools > Integration Configuration.
2. Set the value for key SYNC_TO_SBL_OPPTY_QUOTES to Y
3. Click Save and Close.

Disabling the Siebel CRM Integration

To disable the Siebel CRM integration:

1. Click Navigator > Tools > Integration Configuration.
2. Set value for the keys SYNC_TO_SBL_ACCOUNTS_CONTACTS and SYNC_TO_SBL_OPPTY_QUOTES to N.
3. Click Save and Close.

Note: If the Siebel CRM integration bidirectional code is set up for accounts and contacts, then set SYNC_TO_SBL_ACCOUNTS_CONTACTS to N and BIDI_SYNC_TO_SBL_ACCOUNTS_CONTACTS to Y.

The unidirectional synchronization is disabled.
7 Using Oracle Sales Cloud with Siebel CRM

Overview

This topic describes the Oracle Sales Cloud to Siebel CRM integration workflow.

The Oracle Sales Cloud to Siebel CRM integration works in the following way:

- Siebel CRM checks for existing opportunities and filters out expiring agreements. Salespeople proceed with creating opportunities for these agreements in Oracle Sales Cloud.
- On opportunity update, the embedded dashboards and reports are refreshed. The key performance indicators are represented in the form of infolets.
- Salesperson tracks and analyzes the information and renews contracts accordingly.
- Qualified opportunities are then updated from the quote.

Reviewing Automatically Created Renewal Opportunities

This topic describes how salespeople including sales managers and sales vice presidents can create contract renewal opportunities and review key numbers. Siebel CRM creates contract renewal opportunities for agreements that are about to expire. The Siebel CRM workflow checks for expiring agreements and creates opportunities for these agreements in Oracle Sales Cloud.

Reviewing Expiring Agreements

The Siebel CRM workflow creates renewal opportunities by selecting only those Siebel CRM agreements that meet the conditions of an expiring agreement. An agreement in Siebel CRM expires, when it meets the following conditions:

- Agreement type is Contract.
- Valid check box is set as Y.
- Status of an agreement is either Active, Current, or In Process.
- End date is between 30 and 31 days from the current date.

Note: You can choose to modify the default value of 30 days in the Siebel CRM workflow.

Oracle Sales Cloud adds the following four additional fields containing Siebel CRM expiring agreement details, whenever an existing contract is renewed to create an opportunity:

- Contract Name
- Term in Months
- End Date
- Price Discount Percentage
For further information on expiring agreements, see the Integrating Oracle Sales Cloud with Siebel CRM (1670543.1) document on My Oracle Support.

Setting up a Sales Coach for Contract Renewal Opportunities

Salespeople can create effective work measures and deals by setting up a sales coach for an opportunity. Sales administrators set up a sales coach by associating action items and recommended documents with a sales stage. Salespeople view these items as they work on their opportunities.

A sales coach is associated with a specific sales stage and each sales stage can have multiple action items and recommended documents associated with it. The contract renewal process is ready to use with sales coach procedures defined for B2B contract renewal opportunities, which are predefined in Oracle Sales Cloud.

Administrators can define the following areas for each sales stage:

- Action items or process steps: The steps to be carried out during a sales stage. For example, your administrator may instruct you to review trouble tickets for the customer. You schedule a presentation with the customer to review the usage information and give recommendations.
- Recommended documents: Includes documents and resources, such as customer letter templates, relevant websites, and training materials. Customers can add relevant documents for each sales stage.

Reviewing and Renewing Contracts

Salespeople review contract renewal opportunities, create quotes accordingly, and renew contracts. Salespeople can also view a list of contract renewal opportunities for their accounts. Siebel CRM automatically creates opportunities for expiring contracts and assigns them to the account owner. Salespeople can:

- View the opportunity and check the end date.
- Research whether there are any open trouble tickets.
- Suggest cost effective plans for the customer.

To renew contracts:

1. Sign in to Oracle Sales Cloud.
2. Click Sales > Opportunities.
   The list of contract renewal opportunities for your account is displayed.
3. Click an opportunity to verify whether the opportunity is due for contract renewal.
4. Click the account name link to view the account profile, and then click Open Trouble Tickets.
5. View whether the account or opportunity has open trouble tickets, and check whether the earlier tickets are resolved.
6. Close the Siebel CRM window.
7. In the related opportunity, select a recommended product in the Product field, update the opportunity, and then click Save.
8. Click Open Quotes, and then click Automatic Quote, to create a quote in the Siebel CRM window.
   The quote displays opportunity and product information.
9. Click the quote name to review the quote details.
   The quote line item displays the recommended product and the price determined from the Siebel CRM account price list.
10. Expand the product to view details of individual line items or components.
    The quote details and price are displayed and you can create a proposal for the account.
11. Close the Siebel CRM window and set the sales stage to **Quotation and Proposal**.

   The updated opportunity is displayed in the Win Probability field.

12. Save and close the opportunity.

   You can now move to the next open opportunity.

### Reviewing Key Performance Indicators

This topic describes how sales managers use Key Performance Indicators (KPIs) to view the performance of their team.

When salespeople update a transaction, the embedded dashboards and reports are refreshed. Sales managers review the key numbers on the dashboard. Sales executives can review key numbers for quota attainment in the dashboard.

To review key numbers:

1. Sign in as a sales manager.
2. Click **Sales > Dashboard**.
3. Review the KPI.
4. Click each KPI to view the underlying reports.

The following table lists the KPIs which represent the current quarter opportunities and projected revenue:

<table>
<thead>
<tr>
<th>KPI</th>
<th>Description</th>
<th>When you click the KPI</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actuals vs Quota</td>
<td>Indicates the performance of actual against quota. The KPI displays the quota, won and project revenue totals for all the product categories that sales teams are responsible for.</td>
<td>Graphically displays the breakdown of quota, won, and projected revenues for each of these categories.</td>
</tr>
<tr>
<td>Contract Renewals</td>
<td>Indicates the pipeline and projected revenue for renewal deals. Based on the pipeline and the renewal rate, the projected revenue is obtained.</td>
<td>Displays a list of contract renewals with the highest probability deals first for the quarter. You can sort the list by revenue to view the largest opportunities, and sort them by renewal date or sales stage. You sort the list to view the end date of deals or the current status of the deals.</td>
</tr>
<tr>
<td>New Contracts</td>
<td>Displays an opportunity list for new deals for the current quarter. Based on the pipeline, you can close new deals at the rate of projected revenue.</td>
<td>Displays a list of new contracts with the highest probability deals first for the quarter. You can sort the list by revenue to view the largest opportunities, and sort them by new contracts or sales stage. You sort the list to view the end date of deals or the current status of the deals.</td>
</tr>
<tr>
<td>Renewal Rate</td>
<td>Provides a comparison of historical and current renewal rates. The contract renewal rate displays historical rate and current renewal rate.</td>
<td>Displays the actual renewal rate for each product category, against the rates for the previous year. The period for current renewal rate is last 90 days.</td>
</tr>
<tr>
<td>Bundled Deals</td>
<td>Indicates the active opportunities with bundled products that help capture white space and expand the revenue share.</td>
<td>Displays the details of the opportunities. You can sort the list by revenue to view the largest opportunities, and sort them by...</td>
</tr>
<tr>
<td>KPI</td>
<td>Description</td>
<td>When you click the KPI</td>
</tr>
<tr>
<td>--------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Stalled Deals</td>
<td>Stalled deals are the deals which haven't moved. The default duration is 30 days and set for the corresponding sales stage of the opportunity in the sales stage setup. You can edit the duration.</td>
<td>Displays details of the stalled deal. Salespeople use the details to achieve the deals. You can sort the list by revenue to view the largest opportunities, and sort them by stalled deals or sales stage. You sort the list to view the end date of deals or the current status of the deals.</td>
</tr>
</tbody>
</table>

**Understanding Analytics for Contract Renewals**

This topic describes how salespeople can track information and analyze contract renewals to stay updated on key opportunities.

Using mobile devices, sales managers and sales agents can collaborate with other individuals within the company on a 24/7 basis and track revenue in the following ways:

- Sales managers can view the Oracle Sales Cloud dashboard to monitor progress on meeting quotas. Quotas display actual won revenues against the quota for contract renewals, and projected revenues against contract renewal rates.
- Actual and projected revenues are displayed against a quota, enabling timely decisions for managing key deals.
- Contract renewal opportunities are automatically generated and sorted by the highest probability to win.
- New contracts are tracked and sorted by the highest revenues.
- Renewal rates are automatically calculated and compared against the rates from the previous year. They are displayed by product category.
- Bundled products and promotions are tracked and displayed by opportunity, which provides increased visibility on high-value deals.
- Stalled deals are also identified by displaying opportunities for which the sales stage hasn’t changed within the last 30 days.
The following figure shows the contract renewal workflow.

Updating an Opportunity from a Quote

This topic describes how to use the Update Opportunity function to update an opportunity. When you use the Update Opportunity function from a quote in Siebel CRM:

- The workflow in Siebel CRM is triggered.
- The corresponding opportunity in Oracle Sales Cloud is updated with the Siebel CRM product details.

The opportunities that you create in Oracle Sales Cloud are synchronized with Siebel CRM. When you create a quote, the information from the product in the opportunity is automatically updated to the quote. After you create or update a quote, you can update the corresponding opportunity.

To update an opportunity:

1. Open an existing opportunity in Oracle Sales Cloud and click **Open Quotes** on the Opportunity detail page.
2. Create a quote in Siebel CRM by opening the full Siebel CRM application from Oracle Sales Cloud.

   The Quote Form applet in Siebel CRM displays the quote header details, such as the quote name, account, opportunity, total, price list, and line items details.
3. Update the quote for products.
4. Add, update, or delete the revenue line items in the following way:
   a. To add a new product:
      i. Select a product from Simple Product, Complex Product, Compound Product, and Bundled Promotion product types.
Note: If you select any other product type, an error is created and captured in Siebel CRM.

ii. Enter a quantity and start price.

b. To update a product, update the quantity and the start price for an existing product in line items.

c. To delete a product, remove the product from the line items.

5. Click **Update Opportunity** in the Quote form applet.

The opportunity in Siebel CRM is updated first and then the integration process updates the corresponding opportunity in Oracle Sales Cloud. The revenue lines are updated in the opportunity. Revenues that are part of the recurring schedule are visible in the simplified UI, with the forecast set as TRUE.
Glossary

**account hierarchy**
A set of accounts organized according to their position in a parent-child relationship.

**billing profile**
A billing profile captures information such as type of billing, payment method, billing frequency, bill type, billing cycle, and so on, that are required to invoice the customer for products and services used.

**exemption profile**
An exemption profile lists the subsidy and exemption-related information of a customer.

**financial profile**
A financial profile contains information used to perform a credit check on the customer.

**fraud profile**
A fraud profile contains the fraud profile details of the account which can be used to generate fraud alerts in case of fraudulent charges.

**WSDL**
Abbreviation for Web Services Description Language. It is an XML format that provides a model for describing Web services.