Oracle® Communications Digital Business Experience

Lead to Order Implementation Guide

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Oracle Communications Digital Business Experience Lead to Order Implementation Guide, Release 25.10

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Contents

About This Guide

This guide describes the business process, feature set, and implementation of Lead to Order.

Audience

This guide is intended for:

- Enterprise Sales Representatives
- Sales Administrators
- Individuals who are responsible for configuring, managing, and maintaining tasks and process flows for the Lead to Order business process.

Documentation Accessibility

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Conventions

The following text conventions are used in this document.

Convention	Meaning
boldface	Boldface type indicates graphical user interface elements associated with an action, or terms defined in text or the glossary.
italic	Italic type indicates book titles, emphasis, or placeholder variables for which you supply particular values.
`monospace`	Monospace type indicates commands within a paragraph, URLs, code in examples, text that appears on the screen, or text that you enter.

1 About the Lead-to-Quote Business Process

The Lead-to-Quote business process refers to the end-to-end process of converting a potential customer's interest (lead) into a formal product or service offering (quote). After a prospect (lead) is verified as genuine and showing real interest, a Lead is converted into an Opportunity, which after validating service feasibility and customer requirements moves to the quote phase. After a customer accepts a Quote, it results in an Order, which triggers service provisioning and billing processes.

Lead-to-Quote business process is a key part of the sales lifecycle and includes critical processes as follows:

- Lead Management: Represents a potential customer or sales prospect who has shown interest in products or services (for example, broadband, mobile plans, enterprise connectivity). Capture, track, and qualify leads to determine if they are genuine prospects worth pursuing.
- Opportunity Management: It is a qualified sales prospect where there is a realistic chance of winning business. Tracks potential deals, analyzes customer needs, and assesses feasibility of offering services.
- Quote Management: It is a formal commercial proposal presented to the customer with detailed products, services, pricing, and contractual terms. Configures services, calculates pricing, applies discounts, and generates a customer-ready proposal.

This business process helps Communication Service Providers (CSPs) to efficiently convert interest into revenue while providing a personalized, competitive offer to the customers.

About Lead Management

Lead Management is a systematic process of capturing, tracking, supporting, and converting prospects (leads) into customers. This process involves the following:

- Capturing Leads
- Importing Leads
- Defining Lead Import Template
- Assessing Leads
- Tracking Leads
- Qualifying Leads

The following sections provide detailed information about the above processes.

Capturing Leads

This feature enables users to efficiently gather and record potential customer information from various sources, such as web forms, emails, inbound calls, or marketing campaigns. Within the Lead-to-Quote process, this feature provides a centralized interface to input, organize, and track lead details, including contact information, customer requirements, and preliminary interest in products or services.

This process starts when an Enterprise Sales Representative (ESR) receives lead information. The ESR captures the lead through the **Leads** view or uses the **Create New Lead** quick action on the Siebel UI.

The ESR fills in the basic lead details, optionally links the lead to an existing customer or contact and assigns it to the appropriate ESR. The process ends once all required information is entered and saved.

Prerequisites

- ESRs are already configured in the system.
- The ESR has access to the Agent Portal and lead management features.

System Capabilities and Configuration
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support capture leads functionality:

- Configured the organization, positions, responsibilities, and users for agents.
- Enabled the **Create New Lead** action on the Agent portal.
- Configured assignment rules for Leads based on the following:
  - Captured product type
  - Employee skills
  - Position-level skill mapping
- Configured the **Agent** portal view and **My Leads** view.
- Added the **Assign Lead** action, which triggers real-time assignment rules.
- Configured **Assignment Manager** in the **Interactive** mode.
- Configured assignment object and criteria for lead-product mapping.
- Leads will be assigned based on the first-found position for the product.

Importing Leads

Enterprise Sales Representative (ESR) can efficiently import multiple sales leads from an Excel file, enabling quicker data capture and a streamlined opportunity evaluation process.

When an ESR receives an Excel file containing lead information, they can initiate the bulk import process as follows:

- **Receive a File**: The ESR receives an Excel file containing a list of potential sales leads with relevant details.
- **Import Mapping**: The user creates or verifies an import mapping template specific to the structure of the Excel file. This ensures that data fields are correctly matched during the import process.
- **Import Job Creation**: With the mapping defined, the ESR initiates an import job, specifying the file to be imported.
- **Job Monitoring**: The user can track the progress of the job during the import process. This includes viewing the status of the import and identifying any potential issues.
- **Error Handling**: If errors occur during the import, the system provides a mechanism for the user to review and address these issues, ensuring data integrity.

- **Completion**: The process concludes successfully when all leads have been accurately imported and are ready for the next stage of opportunity assessment and sales engagement.

This feature ensures that sales leads are efficiently captured and integrated into the sales management workflow, allowing ESRs to focus on converting leads into successful deals.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support import leads functionality:

- Configured the organization, positions, responsibilities, and users for the agents.
- Pre-configured the import mapping.
- The pre-configured input file includes the following:
  - Duplicate leads (based on exact match)
  - Update for existing account or contact
  - Creation of a new prospect
- Automated assignments are scheduled for the imported leads based on the product.
- Configured the **Import** view under **Administration**, **Marketing**.
- Configured an **Import** workflow.

Defining Lead Import Template

Sales teams dealing with diverse lead sources must ensure a consistent and efficient import process. This feature empowers sales administrators and Enterprise Sales Representatives (ESR) to define custom import maps, providing a structured template for importing leads into the system.

The goal of this feature is to simplify the lead import process by allowing authorized users to create tailored import maps that match the structure of their lead data.

The lead import template creation comprises the following processes:

- **Initiation**: When a new import map is needed, an authorized user (such as an ESR or administrator) initiates the map creation process.
- **Map Definition**: The user specifies the critical aspects of the import map:
  - **Field Mapping**: Defining the correspondence between source data fields and system fields.
  - **Required Fields**: Identifying mandatory fields ensures complete and accurate data capture.
  - **Exact Match Criteria**: Setting exact match parameters for lead identification, enabling duplicate management.
- **Map Finalization**: After the map is configured, it is ready for use, providing a standardized template for lead imports.

This feature enables sales teams to efficiently manage lead imports, ensuring data consistency and reducing potential errors. By creating custom import maps, users can quickly adapt the system to their unique lead generation processes.

System Capabilities or Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support define lead import template functionality:

- Configured the organization, positions, responsibilities, and users with access to the **Marketing Administration** page.

Assessing Leads

This feature helps Enterprise Sales Representatives (ESR) evaluate their assigned leads to determine potential value and readiness for qualification.

After a lead is assigned to an ESR, the ESR assesses the lead as follows:

- **Review the Lead**: The agent reviews the lead details.
- **Data Enrichment**: Enriches the information as needed and may link the lead to an existing customer record.
- **Investigation Activities**: To support a more in-depth evaluation, the ESR can also create activities, such as follow-up tasks, meetings, or research assignments for themselves or others.

After completing the above process, the ESR completes the assessment and is ready to proceed with lead qualification.

This functionality supports a structured and informed approach to lead evaluation, helping agents prioritize high-potential opportunities.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support assess leads functionality:

- Enabled the **Lead** view.

Tracking Leads

Effective sales management requires real-time visibility into the sales pipeline. The Lead Tracking feature offers sales managers a comprehensive view of lead progress, enabling them to monitor sales activities, identify exceptions, and ensure timely follow-up.

Sales managers aim to maintain control over the sales process by tracking lead advancement, addressing delays, and managing exceptions to optimize conversion rates.

Sales managers can examine lead details, status, and associated activities to gain insights and take appropriate actions as follows:

- The Sales Manager navigates to the Lead Tracker view in Siebel and reviews the status of leads.
- The Sales Manager can also apply filters to identify the following leads:
  - **Overdue Leads**: Those that have not been assessed by the assigned due date.
  - **Unassigned Leads**: Leads without an assigned sales agent.

The above process is complete when the Sales Manager reviews all leads.

Through proactive lead tracking, sales managers can quickly intervene, provide guidance, or reallocate resources to keep the sales process on track, ultimately improving sales performance.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support track leads functionality:

On the Siebel UI, under the **Lead Tracker** view:

- Set the **Default Visibility** to **My team** and **Allow change** to **across organization**.
- The List applet of leads is sorted by the creation date (ascending) as follows:
  - Creation date
  - Description
  - Product
  - Owner
  - Customer, contact, or prospect name
  - Comments
- Defined the Lead threshold on the **Siebel Administration** page. Any lead where the Current date minus the Creation date is greater than or equal to the defined threshold (in days) is graphically represented.
- Created a predefined query for unassigned leads only. This is the default query presented.
- Created a predefined query for all unassigned leads (where status is **Unqualified** and no owner exists).
- Click-through is supported to lead details for any record using the **Lead Description** field. This links to the standard **Lead Details** view where standard lead operations are available (including assign).

Qualifying Leads

This feature allows Enterprise Sales Representatives (ESR) to conclude the lead assessment process by formally qualifying the lead. Based on the assessment outcome, the ESR can either retire the lead, assign it for further review, or promote it to an opportunity.

When the ESR determines that sufficient information has been gathered to make a qualification decision, the ESR can then take one of the following actions:

- Retire the lead, providing a documented reason (for example, not interested, invalid data, and so on).
- Reject and reassign the lead to another ESR for additional review.
- Accept the lead and convert it to an opportunity, initiating the next phase of the sales process.

After the ESR makes an appropriate decision, the lead is either closed or promoted.

System Capabilities or Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support qualify leads functionality:

- Enabled the **Lead Conversion** workflow.
- Enabled the **Opportunity** page.
- Lead navigates to opportunity after successful conversion.
- Automated the prospect promotion to contact or account as part of opportunity creation.
- Duplicate customers are checked and an opportunity is associated with existing customers, if relevant.
- Rejected leads (leads with no owner) will be reassigned.

About Opportunity Management

Opportunity Management is a critical component of the sales lifecycle in the telecommunications industry. It involves tracking, evaluating, and advancing potential sales opportunities from initial qualification to successful closure. Once a lead is qualified, it is promoted to an opportunity, marking the beginning of a structured and strategic sales engagement.

For Communication Service Providers, managing opportunities effectively ensures that high-potential deals are prioritized, sales efforts are streamlined, and customer needs are matched with the right products or services. This process typically includes capturing opportunity details, associating them with accounts or contacts, forecasting revenue, managing activities, and collaborating across teams.

An efficient Opportunity Management system helps sales teams improve win rates, shorten sales cycles, and make data-driven decisions, ultimately contributing to higher customer satisfaction and revenue growth.

This process involves the following:

- Capture Opportunity
- Progress Opportunity Stage
- Manage Opportunity Activities
- Design Sales Method for an Opportunity
- Perform Opportunity Assessment
- Capture Products for Opportunity
- Opportunity Progress Tracker

The following sections provide detailed information about the above processes.

Capturing Opportunity

This feature allows an Enterprise Sales Representative (ESR) to create a new opportunity either by manually entering details or by promoting a qualified lead. The ESR captures key opportunity information, such as customer details, potential deal size, sales team assignment, and the chosen sales methodology.

The capture opportunity feature comprises the following processes:

- **Opportunity Creation**: You can manually create a new opportunity record in the system, often by promoting a qualified lead. This involves providing essential details, such as client information, specific product or service interests, and any initial discussions.
- **Refine and Customize**: You can add more specific details to the opportunity. This includes assigning a dedicated sales team to handle the account and selecting an appropriate sales methodology tailored to the client's needs.
- **Result**: Once all the necessary information is captured, the opportunity is officially launched, and the sales lifecycle commences. This triggers the next phase of the sales process, where the assigned team can start developing strategies and engaging with the client.

By following this simple process, ESRs can efficiently transition from lead qualification to active opportunity management, ensuring a seamless sales experience.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support capture opportunity functionality:

- Configured sales methods and stages.
- The minimum margin from sales method to opportunity is copied.
- Created activity templates.
- Verified the attachments using the extended lead to opportunity workflow.
- Configured the promotion of prospect to account or contact process.

Progressing Opportunity Stage

This feature enables a Enterprise Sales Representative (ESR) to update the stage of an active opportunity as it moves forward in the defined sales methodology. The ESR selects the next appropriate stage based on their assessment of the opportunity's progress.

The progress opportunity stage comprises of the following processes:

- **Stage Assessment**: When an opportunity reaches a new phase in its defined sales methodology, the ESR evaluates the situation and determines the next appropriate stage.
- **Stage Advancement**: Based on the judgment, the ESR assigns the new stage to the opportunity. This triggers an automated response from the system, which applies predefined business rules associated with the selected stage.
  The system then updates the opportunity with the necessary changes, which may include generating new tasks, adjusting sales strategies, or updating forecasts.
- **Review and Action**: The ESR reviews these changes and ensures a smooth transition to the new stage. This involves completing any required tasks and activities associated with the advanced sales stage.

By actively progressing opportunity stages, ESRs can keep the sales cycle dynamic and responsive, adapting to the evolving needs of each sales journey. This feature ensures that opportunities are managed effectively, increasing the chance of successful deals.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support progress opportunity stage functionality:

- Select the appropriate graphical indications and stage-related business logic from the optimized Opportunity views.
- Configured the sales methodology with the appropriate stages defined which will showcase the above behaviors.
- Additional validation during change of stage (see Managing Opportunity Activities for more details).
- If the status of a new stage is not **Abandoned** and
  - If any activity exists for the opportunity whose **Mandatory** flag is set as **Yes** and status is not **Done**, then a warning or error message is displayed.

Managing Opportunity Activities

This feature allows Enterprise Sales Representatives (ESR) to manage all activities associated with an opportunity after it has been created. These activities help track progress and ensure that critical tasks are completed at each stage of the sales process.

Activities can be:

- Automatically generated based on the current opportunity stage.
- Manually added by the ESR to address specific requirements.

ESRs can:

- Add, update, or remove activities.
- Assign team members to tasks.
- Monitor due dates and flag overdue items.
- Mark activities as complete once finished.

This process may occur multiple times throughout the sales cycle as opportunity requirements evolve.

This process concludes when all relevant activities are created, updated, or closed, ensuring the opportunity is accurately tracked and ready for the next phase.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support manage opportunity activities functionality:

- The opportunity activity's view includes only relevant information.
- The opportunity activity passing due date is represented using a graphical indication.
- Set the **Mandatory** flag to an appropriate value on the **Activity** view to be captured during activity creation, and used during stage change (see Progressing Opportunity Stage for more details).

Designing Sales Method for an Opportunity

This feature allows Sales Administrator to create a new sales methodology, addressing the Sales Manager's request for an enhanced opportunity management process.

This feature comprises of the following processes:

- **Initiation**: The process starts when a request is made to define a new sales approach.
- **Methodology Creation**: The Sales Administrator develops the new sales methodology, including defining stages, activities, and assessment templates tailored to the sales team's needs.
- **Customization**: This involves structuring the sales process, incorporating relevant steps and activities to ensure a comprehensive strategy.
- **Finalization**: Once all the required elements are captured, the new sales methodology is ready for implementation.
- **Result**: The developed sales methodology can be used in opportunity management, providing the sales team with a structured framework to manage and optimize their sales pipeline.

This feature allows administrators to design and implement effective sales strategies, ultimately supporting the sales team in achieving their goals.

Performing Opportunity Assessment

This feature enables Enterprise Sales Representatives (ESR) to conduct opportunity assessments, either proactively or in response to a stage change in the opportunity lifecycle.

The process begins when the ESR initiates an assessment. This can occur:

- Manually, at the ESR’s discretion.
- Automatically, triggered by a change in the opportunity stage.

The ESR accesses the **Opportunity Assessment** view to either review an existing, system-generated assessment or manually create a new one from a predefined list.

The ESR then:

- Enters values for assessment attributes.
- Adds relevant comments.
- Reviews the overall assessment score.
- Completes and submits the assessment.

Multiple assessments may be required throughout the sales cycle, depending on the opportunity stage and methodology.

This process ends once the assessment is completed and recorded.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support opportunity assessment functionality:

- Access to the **Opportunity Assessment** view.
- Configured opportunity assessments with or without sales stage associations.

Capturing Products for Opportunity

This feature allows Enterprise Sales Representatives (ESR) to add and maintain information about the products and services offered as part of an opportunity. It helps ensure that all relevant details are captured and kept up to date throughout the sales process.

The process begins after an opportunity is created and requires enrichment with product and service information. While not mandatory, capturing this information is a key enabler for related processes, such as Managing Opportunity Revenue and Managing Opportunity Quotes.

Throughout the sales cycle, this process may be revisited multiple times as offerings are adjusted based on customer needs and evolving deal conditions. ESRs can add, update, or remove products and services as needed.

This process concludes when all product and service information for the opportunity is current and complete.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support capture products for opportunity functionality:

- Products having the **Opportunity Product** field value selected as **Yes** on the **Product Administration** view will only be filtered and displayed on the Product list.
- A product is displayed only if at least one of its associated organizations is also linked to the opportunity. (Both product and opportunity are MVF-based.)
- A graphical indicator is displayed when the product's margin falls below the defined threshold. You can configure the threshold value through the administration settings.

Tracking the Progress of an Opportunity

This feature helps sales managers track the status and progress of opportunities within their area of responsibility.

The process begins when the sales manager accesses the Opportunity Tracker view to review the current state of multiple opportunities. From this view, the manager can:

- Focus on a specific opportunity to analyze its stage history over time.
- Drill down into the full opportunity details for further insights.

The process concludes after the sales manager has reviewed all relevant opportunities as needed.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support tracking the progress of an opportunity functionality:

- In the **Opportunity Header**, enabled log and audit for the **Sales Stage** field.
- The log registers the creation of an opportunity (start of stage 1) and any changes done to the stage value.
- The **Opportunity Tracker** view displays stage history for a specific opportunity, which includes:
  - Stage Name
  - Start Date (initial opportunity creation date for the first stage)
  - End Date
  - Duration (number of days spent in each stage)
  - Set By (employee login who assigned the new stage)
- **Opportunity Management** view: It provides a summarized list of opportunities with key details and exception indicators.
  - View Configuration
    - Default Visibility: My Team
    - Visibility Options: Can be changed to Across Organization
  - Main Applet – Opportunity List displays the following fields:
    - Opportunity Name (linked to full opportunity view)
    - Quote ID (linked to quote view; displays the latest if multiple exist)
    - Customer Name
    - Owner (Sales Team)
    - Expected Closure Date
    - Total Value (Expected Revenue)
    - Probability (%)
    - Sales Method
    - Current Stage
    - Exception Indicators (up to 3)

        * Sorted by Expected Closure Date (ascending)
        * Exception Indicators
    - Graphical indicators (similar to those used in the Opportunity Assessment and Progress Opportunity Stage features) highlight:
        * Opportunity past closure due date, where status is not equal to Won or Lost
        * Current stage is past its due date
        * Latest assessment score is below threshold
- Applet Filters
    - Open Only (default): Displays opportunities with Open status (based on stage)
    - All: Displays all opportunities within the selected visibility scope
- Additional Views
    - Stage Tracker Applet: Displays stage log and audit trail (as described in Section 1)
- Pipeline Applet: Displays a Pipeline Analysis chart for currently listed opportunities
    - Format: 2D Pie Chart
    - Grouped by: Sales Stage
    - Metric: Number of Opportunities

About Quote Management

Quote Management enables sales teams to generate, manage, and track price quotations for products and services. It provides a centralized platform to configure offerings, apply pricing rules, and ensure accuracy in customer quotes. This process supports real-time validations, approval workflows, and version control, helping streamline sales operations, reduce manual errors, and accelerate the quote-to-order cycle. This feature is essential for delivering timely, competitive, and customer-specific proposals in a dynamic environment.

This feature involves the following processes:

- Track Quote Progress
- Cancel Quote
- Revise Quote
- Quote Approval
- Quote Price Adjustment
- Inventory Reservation
- Resource Reservation
- Product Selection and Configuration
- Configure Access Groups
- Configure Catalogs
- Create New Quote

Tracking the Progress of a Quote

As a sales manager, staying on top of quote progress is crucial to ensuring timely sales closures and identifying potential delays. This feature provides a comprehensive solution to address this need, offering a dedicated view for efficient quote management.

Using this feature, sales managers can easily track the journey of a quote from creation to finalization. By navigating to the **Quote Tracker** view, they gain access to a centralized dashboard displaying the status of all active quotes under their supervision. This overview allows sales managers to quickly identify quotes that require attention, ensuring prompt action.

Upon selecting a specific quote, sales managers can investigate a detailed quote progress page, which visually represents the quote's journey through various stages, such as Draft, Sent to Customer, Negotiation, and Approved. This visual timeline enables managers to identify bottlenecks and assess the efficiency of the sales process.

Furthermore, the sales manager can choose to drill down into the full quote details, including customer information, services quoted, pricing, and any associated notes or comments. This comprehensive view facilitates a thorough review, ensuring sales managers are well-informed about the quote's context and any potential challenges.

The process concludes after the sales manager has reviewed and analyzed the necessary quotes, empowering them to take appropriate actions and provide timely guidance to their team. This feature significantly contributes to improving sales performance and customer satisfaction by providing real-time visibility into the quote management process.

By implementing the Quote Tracker, the application enhances its usability and value for sales managers, ultimately driving better business outcomes.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support tracking the progress of a quote functionality:

Logging Quote status change:

- In the Quote header, enabled Log and audit for the **Status** field.
- The log registers the creation of a quote (start of “in progress” status) and any changes done to the stage value.
- Based on the audit records, stage progress for a specific quote displays:
  - Status name
  - Start date (quote creation date for “in progress”)
  - End date
  - Total number of days in status
  - Expected duration indication (see below)
  - Set by (employee login where the stage is the “New Value”)
  - Quote Tracker view is added to the **Quote** page
- Added **Duration** field to the state model states BC (State Model – State) and view (State model detail view – states).
- Created a state model with the name **Quote Tracker** and configured an entry for each quote status with the expected duration (in days) in the **Duration** field.

- The expected duration indicator displays if the duration for each status in the tracker is above the expected duration or not.

> **Note**
>
> The state model name containing the standard duration is a configurable parameter.

Quote management view:

- Set the **Default Visibility** to **My team** and **Allows change** to **across organization**.
- In the Quote list applet provide values to the following fields:
  - Exception indications (see below)
  - Owner (sales team)
  - Quote number
  - Quote total MRC (after adjustments)
  - Quote total NRC (after adjustments)
  - Current status
  - Owner
  - Customer name
  - Opportunity name
- Applet is sorted in ascending order by quote creation date and by expected closure date (oldest to newest).
- Graphical indication displays the following exceptions:
  - Opportunity past closure due date
  - Current status is over expected due date
- Applet allows a toggle between **All** and **Open only** options. Default is **Open only**.
  - Open only: Quotes where the status is not **Closed**, **Order placed**, or **Cancelled**.
  - All: All quotes that are not in status **Cancelled**.
- Opportunity name and quote name fields are used as hyperlinks to the Opportunity and Quote views.
- **Quote status tracker applet**: Log and audit quote stages view as described above.

Cancelling a Quote

In the fast-paced world of sales, there are instances when a quote, previously created with careful consideration, needs to be cancelled. As an Enterprise Sales Representative (ESR), having the ability to efficiently cancel a quote while ensuring a clean and organized process is essential. This feature facilitates quote cancellation, providing a straightforward and effective solution.

When an ESR determines that a quote requires cancellation, they initiate the process by thoroughly reviewing the quote details. This review ensures that the cancellation is necessary and identifies any potential impacts. Upon confirmation, the agent selects the **Cancel Quote** option, triggering the system's cancellation workflow.

The system then efficiently manages the cancellation process:

- **Quote Status Update**: The quote status is changed to **Cancelled**, clearly indicating its new state to all users.
- **Resource Release**: Any resources or services associated with the quote are released, ensuring they are available for future use in other quotes.
- **Read-Only Mode**: To maintain a record of the quote for reference, the system converts the quote to a read-only format, preventing further modifications.

The process concludes after these steps are successfully completed, providing a seamless and organized experience for the ESR. This functionality ensures that quote management remains flexible and adaptable to changing circumstances.

By implementing a user-friendly quote cancellation process, the application empowers ESRs to manage their quotes effectively, even when adjustments or cancellations are necessary.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support cancel quote functionality:

- **Cancel** action is available when the quote status is **In progress**.
- Integration releases triggered reserved inventory:
  - For every line where **Reservation enabled** is **Yes** and reservation status is **Reserved**, and validity end date is greater than current date (or is null).
  - Call an API provided by the inventory solution with request to unreserve using the quote number and line-item number.
- Integration releases triggered reserved resources:
  - For every line item where **Serialized** is **Yes** and reservation status is **Reserved**, and validity end date is greater than current date (or is null).
  - Call an API provided by the resource management solution with request to unreserve using the quote number and line-item number.
- Set the quote status to **Cancelled**.
- Set the quote to **View-only** mode.
- Quote must be available in the opportunity quotes view (if it was initiated from an opportunity).

Revising a Quote

This feature is an essential tool for Enterprise Sales Representatives (ESR), enabling them to adapt and modify approved quotes during the negotiation process with customers. This functionality ensures that ESRs can quickly respond to customer requirements and make necessary adjustments to quotes, fostering a more flexible and efficient sales environment.

When an ESR is negotiating with a customer and needs to make changes to an approved quote, they can initiate the revise quote process. The process starts with the ESR's decision to create a new revision, allowing them to modify specific details while retaining the original quote's essential information.

Upon initiating the revision, the system generates a new quote draft with the status **In Progress**. This draft includes all the original quote's details, providing a foundation for the ESR to work from. The ESR can then make the required changes, such as updating pricing, adding, or removing services, or adjusting terms, to align with the customer's evolving needs.

After the revisions are complete, the ESR can finalize the new quote revision, which will then be available for further negotiation or approval. The system ensures that the original quote remains intact while providing a clear audit trail of revisions, promoting transparency, and facilitating better customer communication.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support revise quote functionality:

- **Revision** option is disabled for the following quote statuses:
  - Pending approval
  - Pending TSQ
  - Closed
  - Any status for which order is already created for the quote
- New revision includes all fields extended on the quote header and line items by any other story.
- Quote status for the new revision will be **In progress**.
- When creating revisions, Attachments are not transferred.
- Approval details are not transferred.
- Tracking information for older revisions is displayed on new revisions.
- Any reservation of resources and inventory will be retained.
- Feasibility statuses will be retained.
- View of manual feasibility activities is done for older revision available for the new one.
- Price adjustments will be retained.
- Old revision will be changed to read only.

Approving a Quote

This functionality enables Enterprise Sales Representatives (ESR) to obtain the necessary authorization to proceed with a quote. The process begins when the ESR initiates approval using the **Approve** option. The system first validates whether the quote requires approval, then triggers the approval workflow based on the quote's content. Approvers are notified, and each approval is recorded until an approver with the appropriate approval threshold grants final approval. After all required approvals are complete, the quote is approved, allowing the quoting process to continue.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support approve quote functionality:

Approval Administration view:

- Configured an **Approval Administration** view in the Administration – Order Management page. This view allows you to capture approval thresholds and criteria using the following structure:

Table 1-1 Approval Threshold and Criteria

Field	Mandatory	Source or Values
Organization	N	From the list of organizations defined in the system.
Entity	Y	Quote or Order
Criteria Type	Y	List of Values: – MRC discount amount – MRC discount % – NRC discount amount – NRC discount % – Margin lower than % – Total MRC value – Total NRC value
Value	N	Number
Approval Level	Y	1 to 5

- Authorized users can add, remove, or change records.
- Each record must have a unique combination of **Organization**, **Entity**, **Criteria Type**, and **Approval Level** fields.
- Every record must include **Created by/Date** and **Updated by/Date** values.
- Extended the product definition (S_PROD_INT) with an **Approval Level** field with possible values of 1 to 5 (bounded list).
- The **Approval Level** is displayed on the **ISS Product Administration** view.
- Extended the quote line item BC (Quote Item) to join the product definition (S_PROD_INT).

Calculate Approval Threshold for Quote:

- The approval threshold is calculated as part of the approval workflow as described above.
- The following information from the quote is used as query approval criteria:
  - For the total quote total MRC or NRC, the criteria value must be greater than or equal to the quote value.
  - For the quote level MRC and NRC total discount amount and discount % (4 criteria), the criteria value must be greater than or equal to the quote value.
  - Lowest value of **Margin%** field for any line item where margin exists, use the margin calculation for the calculated **Margin%** field in the Quote Item BC. The criteria value must be less than or equal to the quote value.
- The following criteria query logic must be used from the administration table to calculate the threshold:
  - Entity type is Quote.
  - Each criterion (up to 7) is queried using the primary organization from the quote header.
  - If any criteria is not found, a query for this criteria should be done with no organization value.
  - For any criteria that is not found, the threshold value is considered as **0**.
  - If no criteria is found, the approval level for the quote is **0** (no approval required).
  - Else, the highest value found is the approval level for the quote (1-5).

- The approval level for quote items is queried as follows:
  - Query the highest value of approval level available on any line item in the quote.
  - If no line item in the quote has a threshold level, then this criteria threshold is **0**.
- If the item approval level is higher than the other criteria calculated, the item approval level becomes the new quote approval level.

Approved Quotes:

When a quote is approved,

- The **Price Management** view becomes read-only.
- Users cannot configure existing products.
- Adding or removing product lines is disabled.
- To revert an approved quote to **In Progress**, create a new quote revision. See Revising a Quote for more information.

Supporting Configurations

- Position hierarchies are defined with different levels of approvals.
- Included at least one hierarchy with no available approver to test the fallback case.
- Assigned users to different positions.

Adjusting Quote Price

> **Note**
>
> This functionality only considers manual adjustments made by the user using the Siebel GUI. Adjustments applied using pricing rules and discount products will be defined as part of the modelling.

This functionality allows Enterprise Sales Representatives (ESR) to modify quoted prices to align with customer expectations and improve the chances of securing a deal. After all products, services, and configuration details are captured, the agent accesses the **Price Management** view to review product prices, including list and customer prices, as well as the total quote values for NRC (Non-Recurring Charges) and MRC (Monthly Recurring Charges). The ESR then adjusts prices as needed, with the system recalculating and displaying updated net prices, line items, and quote totals in real time. If price changes trigger approval requirements, the system provides a visual indication. The process ends when the agent finalizes the revised prices and continues with quote capture.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support adjust quote price functionality:

- Configured the **Pricing Management** quote view to include the relevant pricing information for the quote header and lines.
- Configured the logic to calculate the manual % discount when manual override discount is entered and vice versa.
- Continue using the existing margin calculation from Siebel (requires cost information). No changes are needed.
- Header level quote discount is removed from all views.

- See Approving a Quote for more information about approvals.
- Disabled all methods of changing quote prices outside the **Pricing Management** view and removed the relevant fields.
- Exposed the price waterfall view and enabled the waterfall display using a hyperlink.

About Inventory Reservation

> **Note**
>
> - This functionality currently assumes that reservation is quantity based and not serialized, and that reservations are run against a centralized inventory management solution. Serialized reservation for online shipping scenarios and more complex inventory query routings (for example, for frontal shops) is included in the Business to Customer scenarios.
> - Overall, the details of this functionality may change based on the capabilities and procedures provided by the external physical inventory management solution. Instead of reservation of inventory, this use case can be used as advisory check for inventory availability, without the need to actually reserve the products.

This functionality enables Enterprise Sales Representatives (ESR) to verify and secure the availability of physical goods required to fulfill quoted products and services on the customer's proposed due dates. After all products, services, and configuration details are captured, the ESR initiates an inventory reservation for items marked as **Inventory items** with reservation enabled. This process reserves stock for the entire quote, ensuring logistics readiness before contract signing. Inventory reservation is an optional step in the quote lifecycle and may be performed manually during order capture or automatically during fulfillment. The process ends when the quote is updated with details of the reservations made.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support inventory reservation functionality:

- Extended the product model by adding the **Reservation Enabled** flag to the product model (internal product – ISS admin) and the product view (ISS Product Administration view).
- Extended the quote line model as follows:
  - Added the product **Reservation Enabled** (joined from the internal product – ISS Admin BC).
  - Added the resource indication (S_PROD_INT.Serialized).
  - Added **Reservation Status**, **Reservation Date**, and **Reservation Validity End Date** fields.

    > **Note**
    >
    > These can be reused from the resource reservation as well.
- Configured the **Inventory Management** view for the quote. Lines are displayed based on the **Reservation Enabled** field value.
- Integration is triggered to perform reservation or availability query, which is allowed for the following:

- Request reservation for a specific line in the quote.
- Request reservation for all lines with **Reservation Enabled** as **Yes**.

- Inventory payload varies based on the third-party solution and includes the following:
  - Quote number
  - Line number
  - Product name or ID
  - Quantity
  - Customer name
- For one or all line items, reservation confirmation is received and the quote line details (reservation status, date, and validity end date) are updated based on the reservation requested.
- Stubs are developed to simulate the APIs to the external inventory solution and the reservation confirmation and response. Stubs return the same information required for quote line updates.

> **Note**
>
> - Because resource management and inventory management are similar, you can create a single joined view on the **Quote** page. This view allows users to toggle between updating the displayed line items based on the selected option.
> - Inventory reservations are managed using the quote number and order number, rather than IDs. This approach ensures that revision quotes retain the same reservation information.

Assumptions:

- The physical inventory management system creates time-based reservations and releases any inventory that passes its due date.
- The system performs explicit unreserve when a quote is cancelled.
- Inventory reservation is optional at the quote level. It is not required or validated for approvals, order creation, or other use cases.
- When a reservation is initiated for a quote, the inventory system will:
  - Remove any existing reservations for the quote line (based on quote and line number).
  - Apply a new reservation using the updated information.

About Resource Reservation

> **Note**
>
> This functionality is intended to address logical resources reservations (for example, MSISDN, IP Address, Phone numbers, and so on, and not physical goods. See About Inventory Reservation for physical goods reservation.

This functionality allows Enterprise Sales Representatives (ESR) to allocate necessary resources to the products and services in a customer quote. After all products, services, and configuration details are captured, the ESR reviews the quote to identify items requiring resource allocation. The ESR then reserves resources for all or selected products. This step is optional in the quote lifecycle and may be carried out manually during order capture or automatically during fulfillment. The process concludes when all required resources have been successfully selected and reserved.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support resource reservation functionality:

- Extended the product model by adding the **Resource Type** field based on a list of values to the product model (internal product – ISS Admin) and the product view (**ISS Product Administration** view)
- Extended the quote line model as follows:
  - Added the product **Resource Type** (joined from the internal product – ISS Admin BC).
  - Added the resource indication (S_PROD_INT.Serialized).
  - Added the **Resource Level** field.
  - Configured the Line item integration component and SIS OM PMT service.
  - Added **Reservation Status**, **Reservation Date**, and **Reservation Validity End Date** fields.
- Configured the **Resource Management** view for the **Quote** page with the reserve and release actions. Lines are displayed based on the **Serialized** field value.
- Integration is triggered for query selection of available resources. Customer name is included in the payload to allow customer level reservation.
- Configured an applet to display available resource and allow you to re-query or reserve.
- Trigger reservation request for the selected resource including customer details, quote ID, and other information as will be designed.
- Receive reservation confirmation and update the quote line details.
- Stub is built to simulate the business process:
  - Return list of available resources, different list based on the resource-level parameter.
  - Return reservation information for a resource.

> **Note**
>
> - Because resource management and inventory management are similar, you can create a single joined view on the **Quote** page. This view allows users to toggle between updating the displayed line items based on the selected option.
> - Inventory reservations are managed using the quote number and order number, rather than IDs. This approach ensures that revision quotes retain the same reservation information.

Assumptions:

- The resource management system creates time-based reservations and releases resources automatically when they pass the due date.

- Reservations support resource-level assignments (for example, vanity numbers).
- The system performs an explicit unreserve when:
  - A quote is cancelled, or
  - An agent triggers an unreserve step.
- Resource reservation is optional during the quote lifecycle.
  - If a reservation exists, the system validates its validity during order creation.
  - If a reservation has expired, the system displays an error message.

Selecting and Configuring a Product

This functionality enables Enterprise Sales Representatives (ESR) to choose and customize the products and services to be included in a customer quote. After creating a new quote, the agent accesses the catalog view to select root products, promotions, and related offerings, then configures product options and attributes according to the customer's requirements. This process supports multiple catalog search and selection capabilities, ensuring the quote accurately reflects the proposed products, services, prices, and terms. The process ends when all selected products and services are fully configured.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support product selection and configuration functionality:

- Extended the eligibility to include channel code (based on List of Values).

> **Note**
>
> This can also require extension of Fusion Launch later.

- Extended the position definition to include channel code.
- Extended the quote information to include the channel code based on the primary owner of the quote.
- Configured the quote catalogue views, such as Browse, Favorites, Promotion Configuration, and Shopping Cart.
- Disabled the **Add Line Item** action in the **Line Items** view.

Configuring Access Groups

This functionality allows Siebel administrators to create and manage access groups to meet access control requirements for catalogs and categories. When a need for a new access group is identified, the administrator navigates to the **Access Group** view in the **Administration – Group** page to define the group's details and assign members. The process ends when the new access group is fully configured and ready for use.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support configure access groups functionality:

- Configured access group to showcase access control for catalogues and categories.

Configuring Catalogs

This functionality enables Siebel administrators to create and organize catalogs and categories for product classification and access control. When a requirement for new catalogs or categories arises, the administrator navigates to the **Catalog** view in the **Product Administration** page in Siebel to define the necessary structures. The process concludes when the new catalogs and categories are fully configured and ready for use.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support configure catalogs functionality:

- Defined catalogs and categories as private and public to showcase the capabilities described in this functionality.
- Catalogs and categories contain promotions and root level products (for example, accessories and tangible goods sold separately).

Creating a New Quote

This functionality allows Enterprise Sales Representatives (ESR) to initiate and capture detailed information for a customer proposal. A new quote can be created from the **Customer 360** view or generated from an existing opportunity. The ESR reviews the quote details, adding any information not prefilled by the system, to ensure the proposal includes accurate products, services, prices, and terms. The process ends when the quote header is fully completed.

System Capabilities and Configurations
The Siebel UI has been customized for the Lead-to-Quote reference solution by adding the following new fields or extensions to support create quote functionality:

- Configured **Quick Action** for quote creation on the Customer 360 view.
- Disabled the active quote search, each transaction initiates a new quote regardless of any existing open transactions.
- Following are the changes to the Account model:
  - Added **Collection** status field (with List of Values)
  - Added **Blacklisted** indication (Yes or No)
  - Added **Fraud** status (with LOV)
  - The indications are displayed on the customer view (as defined in the customer view design).
  - You can manually update **Blacklist** indication, **Fraud** status, and **Collection** status as part of customer management.
- Defaulted the quote name.
- Added **Transaction** type to the quote (and order header) based on LOV.
- The default value of **Transaction** type is **New**.
- Disabled the option to copy opportunity products to quote.