Oracle® Communications Digital Business Experience

Lead to Order Implementation Guide

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About This Content

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.

You should be familiar with the TMF ODA Lead to Order business process and its flows.

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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-Order 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-Order 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-Order 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-Order 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-Order 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-Order 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.

Defining an Activity Template

The Defining an Activity Template feature allows sales administrators to formalize and standardize a set of tasks required to complete various sales or care transactions. By creating activity templates, organizations can streamline operations, ensure task consistency, and improve process efficiency across multiple business scenarios. This use case is generic and reusable, supporting the creation and application of activity templates beyond specific opportunities.

The process begins when a business need arises to define a new activity template. The administrator establishes the structure, task order, and dependencies within the template. The use case concludes when the activity template is fully configured and ready for use in sales methods or other transactional workflows.

> **Note**
>
> This feature does not describe the full Out-of-the-Box creation of activities and activity templates with all their permutations. Only the required extensions are defined in details.

System Capabilities and Configuration

The Siebel UI has been customized for the Lead-to-Order reference solution by adding the following new fields or extensions to support the activity template:

- Added the following new fields to the Template Activity BC and FS Template Activity List Applet:

Table 1-1 New Fields

Field	Description
Sequence	A system-generated, unique numeric value that identifies the order of each task within the template.
Dependency Type	An optional field with LOV values **Start** and **End**. Defaults to empty.
Dependent On	Enabled only if the **Dependency Type** field is populated; lists all other sequences within the current activity template (excluding the current one).
Dependent On Name	This is a view-only field; displays the name of the activity specified in **Dependent On**.

- When creating or updating records in the FS Template Activity List Applet:
  - If **Dependency Type** is set, **Dependent On** must also be set; else, an error is displayed.

> **Note**
>
> **Dependent On** and **Dependency Type** are interdependent, which means either both should have a value or both should be null.

- The same fields are also added to the Action BC and displayed as view-only in the Opportunity Activity List Applet.
- Upon creation of activities from an activity template within the Opportunity Activity List Applet (typically triggered by stage changes), all new fields from Template Activity BC are copied to the Action BC record.
- If **Dependency Type** is **Start**:
  - The activity cannot be updated unless the status of the referenced **Dependent On** action is **Complete**.
    Example: If activity 5 is dependent on activity 3, and activity 3 is not complete, then activity 5 cannot be updated.
- If **Dependency Type** is **End**:
  - When attempting to set the status to **Completed**, the system verifies that the referenced **Dependent On** action is also **Complete**. If not, an error message is displayed.
  - Alternatively, the status field for **End** dependent activities are disabled to prevent changes.
- Restricted the list of activity statuses to the following values (all others are unavailable):
  - **Active** (default)

- **In progress**
- **Assigned**
- **On hold**
- **Completed**

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-Order 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-Order 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-Order 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-Order 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-Order 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.

Generating an Opportunity Proposal

This feature enables Enterprise Sales Representative (ESR) to create customer proposals using data from the opportunity record. The process begins when the ESR decides to prepare a proposal for the customer.

To generate a proposal, the ESR accesses the Proposal View and either:

- Selects the Automatic Proposal option, or
- Manually chooses a proposal name and template, then requests draft generation.

A draft proposal document is generated using predefined templates and mapped opportunity data. The ESR can then review and make manual edits to the content as needed.

The process concludes when the proposal is finalized and ready to be shared with the customer.

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

- A document server is set up.
- Configured a Redwood-based template which includes:
  - Cover page (Static + opportunity header and customer details)
  - Executive summary (static + opportunity and customer details)
  - Products and services offered (table, based on opportunity products)

   - Legal (static)
   - Product-specific section: Managed services (optional section)
   - Product-specific section: Hosted services (optional section)
   - Product-specific section: Expert services and consulting (optional section)
- Created a Word template document (for the style and sections).
- Defined field mappings (if needed).
- Defined a proposal library.
  The draft proposal is saved in the proposal library and linked to the originating Opportunity. Locking the document freezes its content to protect the approved version before sharing.

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-Order reference solution by adding the following new fields or extensions to support tracking the progress of an opportunity functionality:

- In the **Opportunity Header**, enabled logging and auditing 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)
  - 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 above)
- 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-Order 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 logging and auditing 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-Order 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 Representative (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-Order 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 Technical Service Qualification (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.
- 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.

Generating a Quote Proposal

This feature is a crucial step in the sales process, allowing Enterprise Sales Representatives (ESRs) to present a comprehensive proposal to subscribers based on the quote details. This functionality ensures that ESRs can effectively communicate the value of the services on offer and receive subscriber feedback or approval, facilitating a seamless sales experience.

When an ESR has finalized the quote details and is ready to seek subscriber approval, they can utilize the quote proposal generation functionality. The system first validates the quote's status to ensure it is ready for proposal generation. After confirmation, the application creates a professional proposal document, summarizing the quote details, service offerings, and any relevant terms.

The ESR can review the proposal, making any final adjustments to ensure accuracy and clarity. The system then enables the agent to send the proposal to the subscriber via email directly from the application. This streamlined process ensures a quick response time and a consistent presentation of the quote details.

The proposal document is stored as an attachment associated with the quote, creating a centralized record for future reference. This attachment feature allows ESRs to easily access and review the proposal's content, facilitating better subscriber conversations.

Upon receiving subscriber feedback, the sales agent can take appropriate actions. If the subscriber approves the proposal, the ESR can update the quote status to **Customer Approved** and proceed with the next steps, such as order generation, which concludes the process.

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

- Added **Generate Proposal** action on the quote header.
- Proposal templates are displayed that enable the user to choose the required template.
- Generate Proposal is enabled only if all the following are true:
  - Quote status is **Approved**.
  - For all line items, **Feasibility required** is **Y** and the **Feasibility** status is **Success**.
  - Customer status is **Active**.
- Set up the Email server integration.
- Exposed the **Quote Attachments** view.
- Extended the quote attachment BC with the following fields:
  - Status: Created, Sent, or Approved
  - Status date
  - Attachment description: Based on LOV seeded values, such as Proposal, Contract, Survey, Data Sheet, and Marketing
- Exposed the extended fields in the **Quote Attachment** view:
  - Status is view only. Created is default upon any record creation.
  - Status date is view only.
- After proposal generation, the system creates an attachment record.
- Attachment status **Approved** is only available if the current attachment status is **Sent**.

Proposal template:

Added Summary and Detailed proposal templates, including the following sections:

- Proposal header which includes:
  - Company logo and name
  - Customer information (name, address)
  - Quote header details: quote name, Id, validity date
- Executive summary
- List of products and services: A table based on quote line items which includes:
  - Product name
  - Product description
  - Quantity
  - Net price (two columns: one for MRC and one for NRC)
  - Commitment period in months (will have value only for promotions)
- For the Detailed proposal template, all products in the quote are displayed.

- For the Summary proposal template, only line items with no parent line item are displayed. This includes promotions and all root items.
- The table is grouped by promotion: each promotion is listed first, followed by its related products.
- Quote total MRC and NRC are displayed at the end of the table.

Performing Automated Feasibility Validation

This functionality allows Enterprise Sales Representatives (ESRs) to verify the technical feasibility of products and services within a quote. The process begins after the ESR completes capturing all required products, services, and their configuration details, including components and attribute values. The ESR then initiates a feasibility check for the entire quote. The system automatically evaluates the quote and updates each quote line with the relevant feasibility information, ensuring that only technically viable offerings proceed in the sales process.

> **Note**
>
> - This process also allows you to deliver the proposed products and services before seeking customer commitment.
> - This process represents a solution which is utilizing the standard Technical Service Qualification (TSQ) order capabilities in Siebel and Oracle Communications Order and Service Management (OSM), rather than a Oracle Communications Unified Inventory Management (UIM) integration. Perform a detailed technical assessment to validate the effort and feasibility of this solution, in Siebel and in OSM COM.

System Capabilities and Configurations
The Siebel and OSM UIs have been customized for the Lead-to-Order reference solution by adding the following new fields or extensions to support performing automated feasibility validation functionality for any of the products in the quote signaled as **Feasibility required**:

- Extended the quote line model as follows:
  - Added Feasibility status (LOV), Feasibility comment (Text), and Feasibility date (date time) to the quote line item BC and view.
  - Added the **Feasibility required** field (join from the Internal product – ISS admin BC) for the product.
- Added the **Feasibility** action to the quote header.
- **Feasibility** action is only available for quotes in **In progress** status.
- After the feasibility action is used, the following must be performed, some of these are done in Siebel by the **SWI TSQ Order Workflow** process which must be adjusted to work with the current quote.
  - Set the status of all line items to **Pending TSQ**.
  - Set Quote header status to **Pending TSQ**.
  - Set fulfillment status code to **Pending TSQ**.
  - Set fulfillment mode to **TSQ**.
  - Set the quote to **View only**.

  - Trigger the order submission workflow using the current quote as the payload.
- Components considered for this include, but are not limited to, the following:
  - **SalesOrderABM** is the current ABM used as payload for the submit order process. Needs to evaluate how the current **SalesOrderABM** payload can be used and what data transformation is required to apply it to quotes.
  - **SISOMBillingSubmitOrderWebService** is the service used in Siebel to submit the order. Need to evaluate if it needs to be changed to also support Quote data or if a different service needs to be developed.
- Orchestration plan, process, and tasks for TSQ are defined in OSM or COM for the services that are part of the Digital Business Experience Reference Implementation model. This includes either UIM integration for automated feasibility or creation of manual feasibility activities in Siebel.
- Any service that does not require TSQ returns **Success** from OSM.
- OSM returns TSQ status as per any orchestration plan. The **SWIOrderUpsert** workflow and web service are extended to allow update of the quote header and line details based on the OSM messages. The extended fields described above must be used (status, comment, and date).
- After the feasibility status exists for all Quote line items, Quote header is changed to **Feasibility Complete**.
- For feasibility failure or error, a graphical indication is displayed on quote and quote lines.
- Initiating configuration session for a product always triggers the deletion of the feasibility related fields in the line items for the product and any child product:
  - Feasibility status
  - Feasibility date
  - Feasibility comment

Approving a Quote

This feature streamlines the approval workflow for sales quotes, allowing designated approvers to efficiently approve, reject, or escalate documents directly within Siebel. When an Enterprise Sales Representative (ESR) initiates an approval process, the system notifies the approver, who can then assess all necessary details (customer, totals, discounts, reason for approval, and so on) and take appropriate action. This process ensures controlled progression of sales quotes through the necessary approval stages, supporting compliance, transparency, and timely sales cycles. The following actions are supported:

- Approve: If you are the final required approver, the quote moves to Approved. If more approval is needed, the system automatically forwards the next request to the parent position.
- Reject: The quote returns to In Progress so the owner can revise and resubmit.
- Escalate: If you need a higher-level review, the request is reassigned to the parent position. If there is no higher level, the system indicates that escalation is not available.

The approval workflow is flexible, supporting both **Full** and **Direct** approval types, and creates an audit trail for all approval activities associated with a quote. While this feature is described for quotes, it is also designed to be reused for other documents (for example, orders, service requests, and so on).

System Capabilities and Configurations

The Siebel UI has been customized for the Lead-to-Order 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 1-2 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 criterion is not found, a query for this criterion 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.

Approval Type Handling:

- Administrators can set a system-wide **Approval Type** (using a List of Values, LOV):
  - **Full**: The approver is always the primary employee of the parent position, regardless of approval threshold.
  - **Direct**: Existing approval logic is used, based on the initiator's approval threshold.

Approval Workflow and Activity Management:

- When a quote exceeds the current owner’s approval threshold:
  - The system evaluates the approval matrix and creates an “approval” activity assigned to the correct approver.
  - The approval activity includes key information, such as document type, number, name, customer, owner, approver, approval level, and an aggregated text field summarizing the request.
- The approver reviews the request in the Approvals view, where core activity details are shown read-only, such as status, request date, decision date, pending days, approver name, role, comments, and key document identifiers.

Approval Request View:

- A dedicated Approval Request view is available under the Activities screen:
  - Visibility is limited to My activities.
  - Only activities with type **Approval** and status **Open** are displayed.
  - Actions available: **Approve**, **Escalate**, and **Reject**, visible at the top of the view.
  - View is sorted by creation date (oldest first).
  - All necessary approval and quote details are shown in columns for easy decision-making.
  - Upon approval or rejection, the view refreshes to remove processed records.
  - Users can toggle to an **Approval History** mode to see all status changes for their approvals.

Approval, Rejection, and Escalation Actions:

- **Approve** button:

  - If the current position's threshold meets or exceeds the activity level, or if there is no parent position:
    - Sets activity status to **Approved** and the quote status to **Approved**.
    - Updates the **Effective as of** field with the current date.
  - Else:
    - Sets activity status to **Approved** and updates **Effective as of**.
    - Creates a new approval activity for the parent position's primary employee, status **Open**.
- **Reject** button:
  - Sets activity status to **Rejected**.
  - Updates **Effective as of**.
  - Resets the quote status to **In Progress**.
- **Escalate** button:
  - If the current approver is of highest level (no parent position found) then:
    - Disable the **Escalate** button (default), else
    - Display an error message `No escalation path found`.

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 UI. 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-Order 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 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-Order 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 Resource is 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-Order 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-Order 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).
- 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 catalog 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-Order reference solution by adding the following new fields or extensions to support configure access groups functionality:

- Configured access group to showcase access control for catalogs 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-Order 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-Order 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.

2
About the Quote-to-Order Business Process

The Quote-to-Order business process streamlines the journey from initial customer inquiry to confirmed order submission, ensuring accuracy, compliance, and efficient hand-off between sales and fulfillment teams. The process integrates sales, pricing, validation, and approval steps, enabling organizations to respond to customer needs quickly while maintaining control over business operations.

This business process involves the following:

- **Quote Creation**
  - The Enterprise Sales Representative (ESR) creates a quote by selecting products and services from the catalog.
  - The ESR customizes offerings, applies configurations, and reviews pricing, discounts, and terms.

  For more information about quote creation, see Creating a New Quote.
- **Quote Validation and Feasibility**
  - The system validates the quote for completeness, pricing accuracy, product eligibility, and compliance with business rules.
  - Any validation issues are flagged for resolution before progressing.

  For more information about quote validation, see Performing Automated Feasibility Validation.
- **Quote Approval**
  - If the quote exceeds defined approval thresholds or requires special authorization, the system initiates the approval workflow.
  - The designated approver reviews the quote and approves or rejects it. Approval activities and comments are tracked for audit purposes.

  For more information about quote approval, see Approving a Quote.
- **Proposal Generation**
  - The system generates a proposal based on the selected products, services, and pricing details.
  - Users can review and edit the proposal content before finalizing.
  - The system records all proposal versions and changes for audit purposes.

  For more information about proposal generation, see Generating an Opportunity Proposal and Generating a Quote Proposal.
- **Order Conversion**
  - Once the quote is approved and feasibility is complete, the ESR converts the quote to an order using the auto order or direct conversion action.
  - The system transfers all relevant data, including product selections, pricing, discounts, and approvals from the quote to the new order.
- **Order Validation**

  - The system performs additional validations specific to order fulfillment (OSM/COM), such as inventory checks, resource reservations, and billing completeness.
- **Order Approval**
  - Orders that meet specific criteria, such as high value or exception terms may trigger a further approval workflow, reusing logic from the quote approval process.
- **Order Submission**
  - The ESR submits the approved order for fulfillment.
  - The system changes the order status to **Submitted**, restricts further edits, and triggers downstream provisioning, billing, and delivery activities.
- **Fulfillment and Activation**
  - Fulfillment teams process the order according to the customer’s requested schedule.
  - Products and services are provisioned and activated, completing the quote-to-order workflow.

Benefits

- Ensures accurate, validated, and compliant quotes and orders.
- Provides an auditable approval process with clear roles and responsibilities.
- Facilitates seamless transition from sales to fulfillment, reducing manual effort and the risk of errors.
- Enhances the customer experience through timely and transparent transaction management.

About Order Management

Order Management is a comprehensive, end-to-end process that manages all customer service and product orders through their complete lifecycle. This process is designed to handle high-volume and complex orders for mobile, fixed-line, broadband, and bundled services, covering both B2B and B2C customer segments. Order Management integrates multiple functions, such as product selection, configuration, feasibility, validation, approval, fulfillment, activation, change management, and customer communication to ensure timely and error-free delivery of telecom services.

Benefits

- Automates and streamlines order handling, reducing lead times and expediting service activation for customers.
- Minimizes errors through feasibility checks, validation, guided entry, and automated business rules, reducing rework and order fallout.
- Delivers timely updates and clear communication, resulting in greater transparency, satisfaction, and trust.
- Reduces manual intervention and process bottlenecks, lowering operational costs and supporting high transaction volumes.
- Ensures all orders are processed according to legal, regulatory, and business policy requirements.
- Handles orders from self-service portals, mobile apps, retail stores, partner channels, or direct sales, providing unified control.

- Supports rapid introduction of new products, promotions, and bundles with minimal disruption to order processing.
- Offers comprehensive tracking, reporting, and audits for all order activity, enabling informed decision-making and continuous improvement.

The sections that follow describe various features supported by the Order Management process.

Creating a New Order Using Auto Ordering

The Auto Ordering feature allows the Enterprise Sales Representative (ESR) to efficiently convert an approved quote into a customer order. This automated process streamlines final order capture, contract issuance, and submission to fulfillment, minimizing manual steps and ensuring data consistency.

To initiate auto ordering, the ESR navigates to the customer screen, locates the approved quote, and selects the **Auto Order** action. The system validates the prerequisites (approval, feasibility, customer eligibility, billing readiness), validates the quote, creates a new order, and guides the ESR to the order view for further processing. The Auto Ordering feature concludes once the quote header is completed and order details are successfully captured.

System Capabilities and Configuration

The Siebel UI has been customized for the Lead-to-Order reference solution by adding the following new fields or extensions to support auto ordering functionality:

- The system copies the following fields from the quote to the new order:
  - Header:
    - Transaction type
    - Monthly Recurring Charges (MRC)
  - Line Items:
    - All feasibility-related extensions
    - All reservation-related extensions
    - Any product model extensions reflected in the quote line items (for example, inventory indication, feasibility requirement, approval level, and so on)
- The system enforces several validations before order creation. If the following validations fail, the system blocks order creation and displays an error:
  - Quote status is **Approved**
  - If a product requires inventory reservation and a reservation exists, its status must be **Reserved** and the end date must be valid. If reservation is not required, this validation is skipped.
  - For any line item with resource reservation (resource number allocated in **Service ID** field), reservation end date is valid (Service ID itself is not mandatory)
  - Customer is in **Active** status
  - At least one billing profile is fully captured (including contact info, address, and payment method)
  - All quote line items include customer references (owner, billing, service) and billing profile
  - Customer collection status is not **In collection**

    - Customer **Blacklisted** indication is not **Yes**
    - Customer fraud status is **Not Fraud**
- Orders created using Auto Ordering have the following characteristics:
    - After final validation, the order can be submitted, which locks edits and triggers downstream fulfillment (OSM/COM)
    - Order is created in **Approved** status
    - Order header information is read-only
    - Catalog view is read-only; new lines cannot be added
    - Line items cannot be removed
    - Editing line items is restricted to users with the Digital Business Experience Order Operations responsibility
    - Configuration (customize) actions are available only to users with the Digital Business Experience Order Operations responsibility
    - Feasibility, inventory/resource reservation, contract printing, validation, revision, cancellation, and submission are enabled
    - Reverting order status to **In progress** requires order revision

Creating a New Order Using Direct Ordering

The Direct Ordering feature allows the Enterprise Sales Representative (ESR) to initiate a new customer order without requiring a prior quote. This workflow is used when a quote is not needed, enabling the ESRs to capture customer requests for new services quickly and efficiently. The process starts when an ESR uses the **New Order** option from the Customer 360 view. The system validates the customer information and creates the order header, guiding the ESR to review and supplement the order with any additional details. The process concludes once the order header is filled out, allowing the ESR to proceed to product and service selection.

This feature provides a streamlined alternative to the auto-ordering process (quote-to-order), giving organizations flexibility to match the order creation method with their business processes.

System Capabilities and Configuration

The Siebel UI has been customized for the Lead-to-Order reference solution by adding the following new fields or extensions to support direct ordering functionality:

- ESRs can quickly create a new order directly from the Customer 360 view using a **New Order** quick action.
- The system disables active order search, ensuring each **New Order** action initiates a fresh transaction, regardless of existing open orders.
- The order name defaults to a combination of the customer name and the current date/time for easy identification.
- The **Transaction Type** field is included in the order header and is populated from the **DBE_MACD_EVENT** list of values.
- The transaction type automatically defaults to **New** for orders created through this method.
- The system triggers all relevant checks using the validation matrix, as specified in the validation framework. This ensures that customer and order information meet required business and data quality standards before advancing in the ordering process.

About Order Validation

The Order Validation feature ensures that sales orders meet all business, technical, and compliance requirements before proceeding to the next stage. Sales managers and Enterprise Sales Representatives (ESRs) can trigger order validations manually or validations may be executed automatically during key order events. The system checks the order against a comprehensive set of rules, then displays actionable results to the user, supporting data integrity and order accuracy across the sales process.

System Capabilities and Configuration

The Siebel UI has been customized for the Lead-to-Order reference solution by adding the following new fields or extensions to support order validation functionality:

- The system leverages the validation matrix developed as part of the quote validation infrastructure. For more information about quote validation, see "Performing Automated Feasibility Validation".
- Each order validation is categorized with the validation entity **Sales Order** and validation event **Validation**.
- The following are the validations covered:
  - All configurations are complete and valid (all mandatory fields are completed and constraints satisfied).
  - For line items requiring inventory or resource reservation, the reservation end date must be current (non-expired) or in the future.
  - For such items, reservation status must be **Reserved**.
  - For line items requiring feasibility checks, the fulfillment status must be **Passed TSQ**.
  - If a feasibility start date exists, the current order due date must be earlier than the feasibility date.
  - An attachment of type **Contract** must be present and its status must be **Approved**.
  - The customer account status must be **Active**.
  - The customer fraud status must not be **Fraud**.
  - The customer account blacklist flag must be **OFF**.
  - The order status must be **Approved**.
  - The customer collection status must not be **In collection**.
  - All order line items must have an associated billing profile in **Completed** status.
- Upon validation, results are presented clearly to the user, indicating where corrections are required or where the order can proceed.
- If any critical rules are not met, the order cannot advance until all issues are resolved.
- Organizations can extend and update the validation matrix as requirements evolve, ensuring ongoing compliance with new business rules or regulatory needs.

About Order Approval

The Order Approval feature enables organizations to control, track, and enforce approval workflows for sales orders before submission and fulfillment. The process leverages the existing quote approval infrastructure, ensuring a consistent and audit-ready approach for both quotes and orders. Approval rules, such as thresholds and approver selection are determined according to defined organizational hierarchies and policy requirements.

When a sales order meets certain threshold criteria, the system automatically routes it to the appropriate approver(s) based on position hierarchies. The approver reviews the order details and either approves or rejects the order. Approved orders become restricted for editing, ensuring the integrity and compliance of key business transactions.

For more information about quote approval process, see Approving a Quote.

System Capabilities and Configuration

The Siebel UI has been customized for the Lead-to-Order reference solution by adding the following new fields or extensions to support order approval functionality:

- Extended the Approval Administration view to include threshold criteria for the **Sales Order** entity.
- Added all relevant approval-related fields (such as, approval type, threshold, approver, approval date, and so on) to the order header.
- During auto-ordering (conversion from an approved quote), all approval information (threshold, approver, approval date) is copied from the quote to the order.
- After approval:
  - The order header and catalog view become read-only.
  - New line items cannot be added, and existing line items cannot be removed.
  - Only users with the **DBE Order Operations** responsibility may edit line item information or use configuration actions (customize).
  - Feasibility checks, inventory and resource reservations, contract printing, validation, revision, cancellation, and order submission remain enabled.
  - The status of an approved order can only be reverted to **In Progress** by creating a new order revision.
- Supporting configurations:
  - Define position hierarchies with multiple approval levels, aligned with your organizational structure and the quote approval process.
  - Configure the hierarchy to include low approval levels to demonstrate scenarios where no higher-level approver exists (highest-level fallback).
  - Assign users to different positions in the approval hierarchy.
  - Optionally integrate email notifications for approval requests or decisions.

About Order Submission

The Order Submission feature allows the Enterprise Sales Representative (ESR) to formally initiate the fulfillment process for an order, whether it was created directly or via a quote. Once an order has been fully captured, validated, and approved, the ESR submits it for provisioning. The system ensures the order is eligible for submission by running all required validations, updates the order status to **Submitted**, and transitions the order to a view-only state (except for revision or cancellation). This process is critical for activating the delivery of products and services to the customer.

System Capabilities and Configuration

The Siebel UI has been customized for the Lead-to-Order reference solution by adding the following new fields or extensions to support order submission functionality:

- The system reuses the existing validation framework, introducing a new validation event called **New Order Submission**.
- All required validations for submission are managed through the validation administration matrix.
- Before submission, the system verifies that all order conditions are met:
  - Full capture, validation, and approval of order details.
  - For orders with inventory or resource reservations, reservation dates must be current if applicable.
  - Logical resource reservation is mandatory when required by configuration.
- Order submission uses the standard AIA integration and the **Submit Order ASI** workflow to trigger downstream fulfillment.
- Standard workflows and web services automatically update order header and line item statuses in alignment with back-end systems (for example, Siebel).
- Upon submission, the order status changes to **Submitted**.
- The order becomes view-only, with the exception of permitted revision and cancellation operations according to inflight ordering policies.

About Order Cancellation

The Order Cancellation feature allows the Enterprise Sales Representative (ESR) to cancel customer orders that are still in the capture stage and have not yet been submitted for fulfillment. This function is available for both direct orders and those created through quotes. When an order must be stopped either by internal decision or at customer request, the ESR can review the order details and use the **Cancel Order** action. The system then updates the order's status to **Cancelled**, releases any reserved inventory and resources, and changes the order to view-only mode. This ensures that all related systems are promptly updated and prevents further modification to the cancelled order.

System Capabilities and Configuration

The Siebel UI has been customized for the Lead-to-Order reference solution by adding the following new fields or extensions to support order cancellation functionality:

- The **Cancel Order** action is available for only submitted orders.
- The **Discard Order** action is available when the order status is **In progress**, **Approved**, or **Pending Approval** (not yet submitted).
- When an order is cancelled:
  - The system triggers integration to the inventory management solution, automatically requesting unreservation for line items with an active “Reservation reference ID” and a valid end date (or a null value).
  - The system triggers integration to the resource management solution, unreserving resources for line items where **Serialized** is set to **Yes**, the reservation status is **Reserved**, and the validity end date is current or future (or null).

- Both integrations use standard APIs, referencing the reservation or resource ID to release allocations.
- Once the order is cancelled, the system sets the order's status either to **Cancelled** or **Discarded**. The order is changed to View-only mode; no further modifications are permitted.

> **Note**
>
> ESRs can still copy or revise the cancelled order, as needed, using standard system features.

About Order Cleanup

The Order Cleanup feature provides an automated, scheduled service that cancels inactive sales orders based on defined thresholds. This technical capability helps maintain system cleanliness by identifying and removing orders that remain in inactive states for extended periods. The cleanup process uses predefined rules to determine which orders are eligible for cancellation, ensuring only genuinely abandoned or outdated orders are affected.

System Capabilities and Configuration

The Siebel UI has been customized for the Lead-to-Order reference solution by adding the following new fields or extensions to support order cleanup functionality:

- Use the Cleanup Details view to set creation and update thresholds (in days) for sales order cleanup.
- Thresholds are defined for the "Sales Order" entity and determine the maximum allowable inactivity periods before an order becomes eligible for cleanup.
- Batch process logic:
  - The cleanup service runs as a scheduled batch process using the Siebel scheduler.
  - The batch process performs the following actions:
    - Queries threshold values based on the configuration for the "Sales Order" entity.
    - Identifies all orders in **Pending**, **Awaiting approval**, or **Approved** status.
    - Checks whether the order age (current date minus creation date) exceeds the specified threshold.
    - Verifies that neither the order header nor any line item has been updated within the threshold; if any part of the order has been updated recently, the order is not cancelled.
    - Ensures that submitted orders are never cancelled, regardless of age.

> **Note**
>
> - If any threshold value is missing, that specific criterion is not applied.
> - If no threshold value or record exists for the “Sales Order” entity, the batch process stops and cleanup does not proceed.
> - The cleanup feature is purely technical and does not address business-driven cancellation needs.
> - Regularly review and update threshold values to ensure proper order management and to avoid unintended cancellations.
> - Only orders not submitted for fulfillment and not recently updated are eligible for automated cleanup.
> - Review order process statuses and update procedures as needed to align with cleanup policies.

About Order Progress Tracker

The Order Progress Tracker feature empowers sales managers to monitor and review the current state and historical progress of customer orders. Through a dedicated view, managers can quickly assess the timeline of each order, identify potential delays, and drill down into order details as needed. This visibility helps to proactively manage order fulfillment and address timeline challenges before they impact the customer experience.

System Capabilities and Configuration

The Siebel UI has been customized for the Lead-to-Order reference solution by adding the following new fields or extensions to support order progress tracker functionality:

- The system logs all major order status changes, starting from order creation (**Pending** status) and tracking each transition in the order lifecycle.
- Each stage log captures:
  - Status name
  - Start date (quote creation date for “in progress”)
  - End date
  - Total number of days in the status
  - Set by (employee responsible for the status change)
  - Expected duration, compared against actual time in status
- The state model “Order Tracker” stores an entry for each order status, including the expected duration (in days).
- The system highlights when any order status exceeds its expected duration, providing a clear warning to the manager.
- The name of the state model with standard duration is a configurable parameter for flexibility.
- A new Order Tracker view (or a reused existing view) is added to the Order screen with the following:
  - Default visibility is **My team**, with an option to expand to **Across organization**.

  - Fields displayed include:
    * Exception indicators (such as overdue status or order past its requested due date)
    * Owner (sales team)
    * Order number and name
    * Requested due date and submission date
    * Order totals (MRC and NRC, after adjustments)
    * Current status
    * Customer name
    * Linked quote number
  - Orders are sorted by creation date (oldest to newest).
  - The applet supports toggling between **All** (all non-cancelled orders) and **Open only** (orders not in **Completed** or **Cancelled** status), with **Open only** as the default.
- The tracker uses clear graphical cues to flag:
  - Orders past their requested due date
  - Orders with current status exceeding expected duration
- A dedicated applet displays the status tracker based on the logged status changes, allowing users to see the progression of each order at a glance.