Oracle® Sales

Implementation Guide

Release 11*i*

Part No. B13761-04

July 2005

ORACLE

Oracle Sales Implementation Guide, Release 11*i*

Part No. B13761-04

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Preface

Intended Audience

Welcome to Release 11*i* of the *Oracle Sales Implementation Guide*.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.

- Oracle Sales

  If you have never used Oracle Sales, Oracle suggests you attend one or more of the Oracle Sales training classes available through Oracle University.

- Oracle Applications Framework

  To learn more about the Oracle Applications Framework, see the OA Personalization Framework and OA Extensibility Framework Guide

- Oracle Self-Service Web Applications

  To learn more about Oracle Self-Service Web Applications, read the Oracle Self-Service Web Applications Implementation Manual.

- The Oracle Applications graphical user interface

  To learn more about the Oracle Applications graphical user interface, read the Oracle Applications User's Guide.

How To Use This Guide

The Oracle Sales Implementation Guide contains the information you need to understand and use Oracle Sales. This guide contains four chapters:

- Chapter 1 provides an overview of Oracle Sales.

- Chapter 2 lists the mandatory and optional dependencies for Oracle Sales.

- Chapter 3 describes the setup tasks that you need to perform in Oracle Sales.

- Chapter 4 describes the tasks that you can perform to configure Oracle Sales to suit your business requirements.

- Appendix A lists the profile options necessary to implement Oracle Sales.

- Appendix B lists the lookup types and codes for Oracle Sales.

- Appendix C describes the seeded views used in Oracle Sales.

- Appendix D lists the roles necessary to implement Oracle Sales.

- Appendix E lists the concurrent programs used when implementing Oracle Sales.

- Appendix F provides guidelines for setting up the PLM product hierarchy for forecasting.

- Appendix G provides information on interoperating Oracle Sales and Oracle TeleSales.

- Appendix H provides information on customizing the business activities shown in the Customers and Contacts details pages.

TTY Access to Oracle Support Services

Oracle provides dedicated Text Telephone (TTY) access to Oracle Support Services within the United States of America 24 hours a day, seven days a week. For TTY support, call 800.446.2398.

Documentation Accessibility

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Related Documents

Other Information Sources

You can choose from many sources of information, including documentation, training, and support services, to increase your knowledge and understanding of Oracle Sales.

If this guide refers you to other Oracle Applications documentation, use only the Release 11i versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF).

- **PDF Documentation-** See the Documentation CD provided with each release for current PDF documentation for your product. This Documentation CD is also available on OracleMetaLink and is updated frequently.

- **Online Help -** You can refer to Oracle iHelp for current HTML online help for your product. Oracle provides patchable online help, which you can apply to your system for updated implementation and end user documentation. No system downtime is required to apply online help.

- **11i Release Content Document -** Refer to the Release Content Document for new features listed release. The Release Content Document is available on Oracle*MetaLink*.

- **About document -** Refer to the About document for patches that you have installed to learn about new documentation or documentation patches that you can download. The new About document is available on Oracle*MetaLink*.

Related Guides

Oracle Sales shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other guides when you set up and use Oracle Sales.

You can read the guides online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Guides Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Guides Related to This Product

Oracle Sales User Guide

This manual provides information on how to use Oracle Sales. It includes procedural information, describing in detail how to use each functionality.

Oracle Self–Service Web Applications Implementation Guide

This manual contains detailed information about the overview and architecture and setup of Oracle Self–Service Web Applications. It also contains an overview of and procedures for using the Web Applications Dictionary.

Oracle Marketing Implementation Guide

This guide contains information on implementing Oracle Marketing. Oracle Marketing automates the entire marketing process from campaign planning, budget management, and list creation to execution and analysis.

Oracle Proposals Implementation Guide

This guide contains information on implementing Oracle Proposals. Oracle Proposals enables you to generate dynamic proposals using templates. Oracle Proposals streamlines proposal creation by automating tasks. You can generate proposals from templates that package recurring proposal elements such as cover letters, executive summaries, and product descriptions.

Oracle Quoting Implementation Guide

This guide contains information on implementing Oracle Quoting. Oracle Quoting enables the creation and management of customer quotes across all sales and interaction channels. Organizations can use Oracle Quoting to propose product solutions and perform negotiations, while enforcing consistent business rules throughout the sales cycle.

Oracle Territory Manager Implementation Guide

This guide contains information on implementing Oracle Territory Manager. Oracle Territory Management assigns business objects (customers, opportunities, and leads, for example) to resources based on configured business rules.

Oracle TeleSales Implementation Guide

This guide contains information on implementing Oracle TeleSales. Oracle Telesales is an application designed for interaction center professionals, whether they are inbound or outbound agents, providing provides tools to manage the sales cycle, from prospecting to booking orders.

Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide

This guide contains information on implementing the various Daily Business Intelligence Reports, including Daily Business Intelligence for Sales.

Oracle Sales Intelligence Implementation Guide

This guide describes implementing Sales Intelligence reports.

Oracle Inventory Implementation Guide

This guide contains information on implementing Oracle Inventory. Oracle Inventory enables you to set up your company's inventory sites and business units defining organizations, locations, subinventories, locators, items and units of measure.

Oracle Projects Implementation Guide

This guide contains information on implementing Oracle Projects. In Oracle Sales, Oracle Projects provides visibility of projects related to specific opportunities.

Oracle Partners Implementation Guide

This guide contains information on implementing Oracle Partners. Oracle Partners provides sales representatives with the capability to determine the sales channel for a lead or opportunity.

Oracle Incentive Compensation Implementation Guide

This guide contains information on implementing Oracle Incentive Compensation. Oracle Incentive Compensation provides information on sales commissions, bonuses, and payment adjustments.

Oracle Advanced Product Catalog User Guide

This guide provides product category and product hierarchy information.

Oracle Trading Community Architecture User Guide

This guide provides information on using features in the Trading Community Manager.

Trading Community Architecture Reference Guide

This guide contains seeded relationship types, seeded Data Quality Management data, D&B data elements, import interface tables fields and validations. This guide supplements the documentation for Oracle Trading Community Architecture.

Trading Community Architecture Administration Guide

This guide describes the administration and implementation of Oracle Trading Community Architecture (TCA). You set up and manage TCA tools, functionality, and concepts that affect data in the TCA Registry and the Data Quality Management features within the Trading Community Architecture.

Oracle Web Applications Desktop Integrator Implementation Guide

This guide contains information on setting up Oracle Web Applications Desktop Integrator, which enables users to control spreadsheet formatting and download.

Oracle Common Application Components User Guide

This guide contains information on using Oracle Common Application Components, such as Notes and Tasks.

Oracle Workflow User's Guide

This guide describes how Oracle Applications users can view and respond to workflow notifications and monitor the progress of their workflow processes.

Oracle General Ledger User Guide

This guide describes how to use the Oracle General Ledger.

Oracle General Ledger Implementation Guide

This guide describes how to implement the Oracle General Ledger.

Oracle CRM Application Concepts and Procedures

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11i. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11i, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications and the Oracle technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user guides and implementation guides.

Oracle Applications Implementation Wizard User Guide

If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11i. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11i. You cannot upgrade to Release 11i directly from releases prior to 10.7.

"About" Document

For information about implementation and user documentation, instructions for applying patches, new and changed setup steps, and descriptions of software updates, refer to the "About" document for your product. "About" documents are available on Oracle*MetaLink* for most products starting with Release 11.5.8.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, Auto Patch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screens, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff and describes the Oracle Application Object Library components that are needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. This manual also provides information to help you build your custom Oracle Forms Developer forms so that the forms integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the Oracle Sales implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This guide also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Oracle*Metalink* .

Oracle Applications Message Manual

This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle Workflow Administrator's Guide

This guide explains how to complete the setup steps necessary for any Oracle Applications product that includes workflow-enabled processes, as well as how to monitor the progress of runtime workflow processes.

Training and Support

Training

Oracle offers a complete set of training courses to help you and your staff master Oracle Sales and reach full productivity quickly. These courses are organized into

functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many education centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Sales working for you. This team includes your technical representative, account manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle server, and your hardware and software environment.

OracleMetaLink

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using an Oracle Applications form can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

1

Introduction

This chapter covers the following topics:

- Oracle Sales Overview
- New in this Release

Oracle Sales Overview

Oracle Sales simplifies the sales process by providing complete visibility into the sales cycle, thereby helping companies to plan and manage effective selling activities.

Oracle Sales includes the following features:

- **Streamlined creation and management of leads and opportunities:** You can create leads, either manually by importing them from a marketing sales campaign tool, or from TeleSales agents entering leads from phone calls. Oracle Sales assists in tracking these leads, routing them to the appropriate sales representative, and converting the leads into opportunities. After conversion, sales representatives can update opportunity details, track opportunity progress, and manage ongoing customer interactions.

- **Access to integrated account history as well as a full contact repository:** Oracle Sales provides users with a complete view of the customer by integrating information from other e-business suite modules such as Marketing, Service, and Order Management. The contact repository includes information from other applications as well.

- **Ability to track interactions with customers from the initial marketing campaign to the creation of leads, and on to completion of sales opportunities:** Oracle Sales employs Notes functionality to track customer interaction. Sales representatives can enter notes in leads, opportunities, customers, contacts, and forecasts.

- **Sales Dashboard provides a data summary:** Sales Dashboard home page provides a summary of important data such as open leads and opportunities, daily tasks and meetings, top customer information, forecast numbers, and links to sales tools.

- **Sales Methodologies to help streamline sales practices:** Oracle Sales supports custom sales methodologies, with multiple stages, allowing customers to create their own unique methodologies based on product lines, sales channels, and marketing campaigns. With each stage, Oracle Sales provides a *sales coach* that walks the sales representative through a pertinent series of questions. The sales coach ensures that sales representatives follow certain procedures throughout the sales process.

- **Calendar and tasks tools to manage sales representatives' time:** Sales representatives can view their daily tasks and appointments. They can create new appointments, invite other attendees, and synchronize with external calendar applications. Using the task tool, sales representatives can create and update tasks.

- **Sales team assignment**: Sales teams can be assigned either manually, or by using the Territory Assignment Program (TAP). Sales team data is available in lead, opportunity, and customer pages.

- **Sales Forecasting:** Oracle Sales provides a Product Category Worksheet that enables sales representatives to report a product-based forecast to sales managers.

- **Competitor Tracking:** Within each opportunity product in Oracle Sales, a sales representative can include competitor information such as name, product, and win or loss status. Additionally, Oracle Sales has defaulting capabilities that match products in the opportunity to potential competitor products.

- **Attachments:** Sales representatives can add external documents and web addresses to opportunities, leads, customers, and contacts.

- **History Tracking:** Oracle sales enables history tracking for leads and opportunities (including product and non-revenue opportunities).

- **Advanced search tools:** Users can search leads, opportunities, customers, and contacts using powerful search tools. For leads and opportunities, you can save the search results for future use.

- **Proposals:** Oracle Sales integrates with Oracle Proposals to provide sales representatives with the ability to create proposals and send collateral.

- **Quoting:** Oracle Sales integrates with Oracle Quoting to provide sales representatives with the ability to create a quote from an opportunity.

- **Partners:** Oracle Sales integrates with Oracle Partners to provide sales representatives with the ability to determine the sales channel for a lead or opportunity and external sales teams for customers.

- **Projects:** Oracle Sales integrates with Oracle Projects to enable sales representative to capture the costs related to the pursuit of opportunities.

- **Incentive Compensation:** Oracle Sales integrates with Oracle Incentive Compensation to enable users to view sales commissions, bonuses, and payment adjustments.

- **Sales Offline:** Oracle Sales Offline is a mobile application that enables sales representatives to manage sales information remotely.

This document describes functionality to be delivered in the Oracle E-Business Suite 11.5.10 release. If you are implementing this product prior to the release, using product minipacks or family packs, some new functionality may be dependent on integration with other Oracle products. Please consult MetaLink for relevant product patches and documentation.

New in this Release

The following features are new in this release of Oracle Sales:

- Default Sales Dashboard has changed

- Configurable Sales Dashboard

- Sales Funnel segments on the Sales Dashboard can now be configured to represent multiple sales stages, rather than just one stage

- Integration with Oracle Partners to provides sales representatives with the capability to route opportunities and display the external sales team for leads and customers

- Integration with Oracle Projects to display projects related to an opportunity

- Integration with Oracle Sales Offline for remote sales activity

- Attachments for opportunities, leads, customers, and contacts. These attachments can include text, external documents and web addresses.

- Additional flexfield support for lead lines, lead contacts, lead sales team, opportunity lines, opportunity contacts, opportunity sales team, and customer sales team

- Create an opportunity or a lead from a customer

- Change the customer for an opportunity

- View General Classification information

- Display of Budget Amount for leads (available through personalization)

- Display of Response Channel for leads and opportunities (available through personalization)

- Export lead, opportunity, customer, contact, and task tables to an external file to use in a spreadsheet application

- Do not call preference for contacts

- Notes have added security of public, publish, or private

- User personalization of the defaults for some fields containing key values for leads, opportunities, and forecasts

- History tracking of lead header information and opportunity information (including opportunity header, products and non-revenue)

- Line-level forecasting and contribution

- Addition of the Sales Admin role

- Contact searches

- Lead and opportunity advanced searches, and the ability to save searches as views

- View commission statements

- Business activities customization on Customer and Contacts details pages through the use of a plug-in

- Export Opportunities button on the Forecast page to enable the download of opportunities into a Web Applications Desktop Integrator (Web ADI) driven spreadsheet with download capability.

2

Verify Mandatory Dependencies

This chapter covers the following topics:

- Oracle Sales Mandatory Dependencies
- Oracle Sales Conditional Dependencies
- Oracle Sales Optional Integrations

Oracle Sales Mandatory Dependencies

Oracle Sales depends on other Oracle applications to provide additional functionality. Some of these are mandatory dependencies that are required for Oracle Sales to function properly.

Oracle Sales requires that the following applications be completely installed and implemented.

- **Oracle Applications Framework:** Provides the framework and user interface for Oracle Sales. Enables personalization of the Oracle Sales user interface**.**

- **Oracle General Ledger:** Provides daily conversion rates for currency conversion. Refer to the *Oracle General Ledger Implementation Guide* for complete setup information.

- **Oracle Inventory:** Provides all product information. Refer to the *Oracle Inventory User's Guide* for complete setup information.

- **Oracle Product Lifecycle Management:** Provides product category and product hierarchy information. Refer to the *Advanced Product Catalog User's Guide* for complete setup information.

- **Oracle Sales Daily Business Intelligence:** Refer to the *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide* for information on setting up and enabling Sales DBI.

- **Oracle Trading Community Architecture:** Provides customer and contact information. Refer to the *Oracle Trading Community Architecture Administration Guide.*

- **Oracle CRM Application Foundation:** Refer to the Oracle CRM Application Foundation documentation set.

- **Oracle Common Application Components:** Provides calendar, notes, and tasks information. Refer to the *Oracle Common Application Components Implementation Guide*.

Oracle Sales Conditional Dependencies

Conditional dependencies are setups that are subject to whether you want to implement certain functionality. For example, if your users will want to see partner information, you would implement Oracle Partners.

- **Oracle Daily Business Intelligence:**

    - Data for the Dashboard Top Customers table

    - Service and Service Contracts

        You must implement the following DBI areas to view this information:

        Service: Provides information for the Service Requests Summary bin. Refer to the *Oracle Service Intelligence Implementation Guide* for setup information.

        Service Contracts: Provides information for the Top Customers table and the Products Under Contracts bin. Refer to the *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide*for setup information.

- **Oracle Marketing**: Provides marketing campaign data and competitor information. Refer to the *Oracle Marketing Implementation Guide* for complete setup information.

- **Oracle Proposals**: Allows sales representatives to create customized proposals to distribute to customers. Refer to the *Oracle Proposals Implementation Guide* for setup information.

- **Oracle Quoting**: Allows sales representatives to create quotes from opportunities. Refer to the *Oracle Quoting Implementation Guide* for setup information.

- **Oracle Partners:** Provides sales representatives with the capability to determine the sales channel for a lead or opportunity and customer external sales team. Refer to the *Oracle Partners Implementation Guide* for setup information.

- **Oracle Projects:** Provides visibility of projects related to specific opportunities. Refer to the *Oracle Projects Implementation Guide* for setup information.

- **Oracle Incentive Compensation:** Provides information on sales commissions. Refer to the *Oracle Incentive Compensation Implementation Guide* for setup information.

- **Oracle Service:** Provides a list of all customer's service requests. Refer to the *Oracle Service Implementation Guide* for setup information.

- **Oracle Service Contracts**: Provides service contract details for service items. Refer to the *Oracle Contracts for Service Implementation Guide* for complete setup information.

- **Oracle Territory Manager:** Assigns sales teams to leads, opportunities, and customers based on sales territory definitions. Refer to the *Oracle Territory Manager Implementation Guide* for complete setup information

- **Oracle Sales Offline:** Provides sales representatives with mobile sales information management functionality. Refer to the *Oracle Sales Offline Implementation Guide* for complete setup information.

- **Oracle Web Applications Desktop Integrator:** On the Forecast page (through the Export Opportunities button) provides the capability to download opportunities into a Web Applications Desktop Integrator (Web ADI) driven spreadsheet with download capability.

Oracle Sales Optional Integrations

Optional Integrations are CRM, ERP, and third party applications that provide additional functionality. They are not specifically required for Oracle Sales to function.

- **Pumatech's Intellisync:** A desktop tool for synchronizing the calendar with external calendar applications such as Outlook. Refer to the *Palm and Outlook Synchronization* information in the *Oracle Common Application Components Implementation Guide* for more information.

3

Implementation Overview

This chapter covers the following topics:

- Implementation Task Sequence

Implementation Task Sequence

Oracle strongly recommends that you implement Oracle Sales in the order listed.

> **Note:** This guide assumes that you have successfully implemented the integrated applications. The steps listed below are specific to Oracle Sales implementation.

Table 3-1 lists the steps for implementing Oracle Sales.

Table 3-1 Oracle Sales Implementation

Mandatory	Description
Yes	Set up users and reporting hierarchy
	Define resource groups
	Set up employees as users
	Import employees and assign roles and resource groups
	Set system profile options
	Set up Manager access through DBI
Yes	Set up the product hierarchy
Yes	Set up Data Quality Management (DQM) in the Trading Community Architecture (TCA)

Mandatory	Description
Yes	Set up multiple currencies
	Set up currency codes
	Set up calendar types
	Set up accounting calendar
	Set up type mapping
	Set the profile options for multiple currencies
	Set up reporting currencies
	Enter the GL daily conversion rates (only if more than one currency is used)
	Enter currency conversion rates for periods (only if more than one currency is used)
	Run concurrent programs
Yes	Set up Lead Management
	Set up automatic lead assignment
	Set up lead rules engine
	Set up qualification rules
	Set up rating rules
	Set up channel selection rules
	Set up profiles
Yes	Set up opportunities and forecasting
	Create win probabilities
	Set up the calendar
	Define credit types in Order Management
	Set up lead and opportunity status codes
	Set up forecast categories
	Set up forecast category mapping
Yes	Set the Framework Compatibility Mode
Yes	Set up DBI
	Set up Sales DBI
	Set up Service DBI (optional)
	Set up Service Contracts DBI (optional)
No	Define sales stages
	Setting up sales coaches (sales supplements) (optional)
	Set up sales methodologies (optional)
No	Import Leads
Yes	Setting up the Sales Funnel
	Personalize the user interface (optional)
No	Set up Security
No	Set up Time zones for area codes

Mandatory	Description
No	Set up Territories
No	Set up Marketing Source Codes
No	Set up Sales Campaigns
No	Set up Competitor information
No	Set up Quoting
No	Set up Proposals
No	Define descriptive flexfields
No	Set up Partners
No	Set up Projects
No	Set up Incentive Compensation
No	Create new user views
No	Personalize lead and opportunity search parameters
No	Set up admin views
No	Set up selective search criteria
No	Enable Top Opportunity and Top Customers table on the Sales Dashboard
No	Define display profile options for Leads by Age and Sales Campaign Dashboard bins
No	Set up Oracle Web ADI to enable the download of multiple opportunities from the Forecast page

4

Implementation Tasks for Oracle Sales

This chapter covers the following topics:

- Setting up Users and Reporting Hierarchy
- Setting up Product Hierarchies
- Setting up Data Quality Management in Trading Community Architecture
- Setting up Preferred Currency
- Setting up and Enabling Currency Conversion
- Setting up Leads Management
- Setting up the Leads Ranking Engines
- Creating Win Probabilities
- Setting up Sales Stages
- Setting up Sales Coaches (Sales Supplements)
- Setting up Sales Methodologies
- Creating and Modifying Status Codes
- Setting up Forecast Categories
- Setting up Forecast Category Mappings
- Set the Defaults for Forecast Amounts
- Set the Framework Compatibility Mode
- Setting up Daily Business Intelligence
- Importing Leads
- Setting up Dashboard Tables - Leads by Age and Cross-Sell/Up-Sell Campaigns
- Defining the Sales Funnel
- Setting up Security
- Setting up Time Zones
- Setting up the Territory Assignment Program (TAP)
- Setting up Marketing Source Codes
- Setting up Sales Campaigns
- Setting up Competitor Information

- Setting up Quoting

- Setting up Proposals

- Setting up Projects

- Setting up Partners

- Setting up Incentive Compensation

- Setting up Attachments

- Setting up Notes, Tasks, and Calendar

- Setting up Customer Classifications

- Setting Up Web ADI to Enable Forecast Opportunity Export

- Setting up Opportunity History Tracking

- Defining Descriptive Flexfields

- Setting up Lead and Opportunity Searches

- Personalizing the User Interface

Setting up Users and Reporting Hierarchy

In order for users to access Oracle Sales, they must be set up as valid resources. Resources are then assigned responsibilities and roles within a group. Setting the security profile options for a resource determines what customers, leads, and opportunities the resource can access and the level of access.

End users of Oracle Sales should log in using the Sales User responsibility. Users who are Sales Managers or Sales Admins should log in using the Sales Manager responsibility.

- Setting up a Group, page 4-2

- Verify Group Setup, page 4-4

- Setting up Manager Roles, page 4-4

- Setting up the Sales Admin Role, page 4-4

- Setting up Employees as FND Users and Assigning Responsibilities, page 4-5

- Creating a Resource and Assigning Roles and Resource Groups, page 4-5

Setting up a Group

Groups are used in Oracle Sales security to determine the resource hierarchy. Groups identify the subordinates under a particular manager. The resource with a manager role in a group is considered the manager of all other resources in that group and any child group.

> **Note:** Each Sales Group must have only one user with a manager role that is both active and not deleted. Additionally, the manager role must be active in the roles table in Resource Manager.

A resource can belong to multiple groups. Only one resource with a manager role should be in each group. If you are defining group hierarchies, set up the Parent group first.

Login

Oracle Forms

Responsibility

CRM Resource Manager

Navigation

Resources Manager > Maintain Resources > Groups

Steps

1. Set up a group based on the procedure defined in the *Oracle CRM Application Foundation Concepts and Procedure*s.

2. Select Sales and TeleSales from the Usage list of values.

Changes in Resource Hierarchy

If groups change within your existing resource hierarchy, be sure to use Move Member in the Resource Manager to move group members before taking any other action, such as providing an end date for the group. After making resource hierarchy changes, sales representatives and sales managers might have to resubmit their forecasts.

> **Note:** Do not end date a group member role to remove the member from a group hierarchy. Always use Move Member to move a group member out of a group and into a new group.

Here are resource hierarchy change scenarios and how to manage them:

Sales Representative Moves to Another Sales Group

1. Move the sales representative using Move Member.

2. Have the previous manager save his forecast worksheet and resubmit the forecast for his group.

3. Have the sales representative and the new manager save their forecast worksheets and resubmit their forecasts.

All Members of a Sales Group Move to Another Sales Group

1. Move all of the sales representatives using Move Member.

2. Have the previous manager save his forecast worksheet and resubmit the forecast for the group.

3. Move the sales manager using Move Member.

4. End date the sales manager role for one sales manager, and give that manager a sales representative role.

5. End date the old sales group after moving all of the members.

6. Have the sales representatives and the new manager save their forecast worksheets and resubmit their forecasts.

Sales Manager Leaves - All Sales Representatives Move to a New Manager

1. Move the sales representatives to the new manager's group using Move Member.

2. End date the previous manager.

3. Add the new manager to the old sales group.

4. Have the new manager save the forecast worksheet and submit a forecast for the old sales group.

5. End date the old sales group.

6. Have the sales representatives save their forecast worksheets and resubmit their forecasts.

7. Have the sales manager save his forecast worksheet and submit a forecast for his new group.

Verify Group Setup

To verify that you have set up your groups correctly:

Login

Login to Oracle Forms

Responsibility

CRM Resource Manager

Navigation

Resource Manager > Maintain Resources > Group Hierarchy

Setting Up Manager Roles

Oracle Sales security uses roles to determine which resources are managers. A manager must have an active role, of any role type, with the Manager flag checked. In addition, a manager must have the appropriate role in the context of a group.

A manager's access level to leads, opportunities, and customers depends on the security profile options. Refer to Setting up Security, page 4-20 and Security Profile Options, page A-6 for more information.

Table 4-1 lists examples of users, roles, roles attributes, and role types.

Table 4-1 Role Type Example

User	Role	Role Attribute	Role Type
Bob Jones	Regional Sales Manager	Manager	Sales
Jane Adams	District Sales Manager	Manager	Sales
John Franklin	Sales Agent	Member	Sales
Jennifer Moore	Sales Agent	Member	Sales

For complete instructions on setting up roles, refer to the *Oracle CRM Application Foundation Concepts and Procedures.*

Setting up the Sales Admin Role

The Sales Admin role enables a sales group member (such as an administrative assistant, or other support team member) to have access to all leads, opportunities, customers, and

contacts to which the manager of the sales group has access. A user with this role can act for the sales manager when necessary.

The level of access for the Sales Admin is based on the ASN: Sales Admin Update Access profile. The Sales Admin has view only access to a manager's forecast details unless the profile option ASN: Sales Admin Forecast Update Access is set to Yes, which enables the Sales Admin to create, update, or submit a forecast for the sales manager. Note that even with the ASN: Sales Admin Forecast Update Access profile set to Yes, the Sales Admin will not be able edit the sales manager's owned opportunities on the Forecast page. The Sales Admin can edit the opportunities by drilling down to the opportunity page depending on the setting of the ASN: Sales Admin Update Access profile.

You can specify that a sales group member is the Sales Admin by setting the role attribute for that user to Admin=Yes. Sales Admin is not a seeded role. If you want to restrict the role of Sales Admin (for example, removing business object creation capacity) you can do this through personalization.

A user acting as Sales Admin must log in using the Sales Manager responsibility.

Creating a Resource, and Assigning Roles and Resource Groups

All Oracle Sales users must be set up as valid resources in Oracle Resource Manager. Users who are not valid resources cannot log in to Oracle Sales. To set up users, use the CRM Resource Manager responsibility.

When you create a resource you assign roles to the resource. To belong to a sales group a user should be a member of the sales group and have at least one active role of any role type.

You can create a resource either by entering the user information into Resource Manager or by importing an employee from Oracle Human Resources into Resource Manager.

Login

Oracle Forms

Responsibility

CRM Resource Manager

Navigation

Maintain Resources > Import Resources

For information on creating a resource, refer to the *Oracle CRM Application Foundation Concepts and Procedures*.

Setting Up Employees as FND Users and Assigning Responsibilities

You must set up employees as users and assign them certain responsibilities in order for the employees to access Oracle Sales.

Responsibilities determine to which application functions and data users have access. For more information, refer to the *Oracle Applications System Administrator's Guide*.

Prerequisites

The person must be set up as an employee in Oracle Human Resources. Refer to *Managing Your Workforce Using HRMS (US)* for more information on setting up employees.

Login

Oracle Forms

Responsibility

System Administrator

Navigation

Security > User > Define

Steps

1. Follow the steps for creating a user listed in the *Oracle Applications System Administrator's Guide*.

2. Assign one or more of the seeded responsibilities or any customized responsibilities. For example, you should assign a sales representative with the Sales User responsibility, a sales manager or Sales Admin with the Sales Manager responsibility, and a system administrator with both the Sales Administrator and the Oracle Sales Administrator responsibilities.

   > **Note:** If your implementation of Oracle Sales integrates with Oracle Proposals, be sure to exclude the function ASF_TRANS_FORWD from the responsibility you assign to any user. This is to ensure proper navigation between Oracle Sales and the proposals functionality.

   The Sales Administrator responsibility differs from the Sales Admin responsibility. The Sales Admin is a special responsibility for someone designated to act for the sales manager in a group, not a system administrator.

   Refer to Seeded Roles and Responsibilities, page D-1 for details on seeded responsibilities.

Setting up Product Hierarchies

Oracle Sales uses a product catalog common to all applications across the eBusiness Suite. Within the product catalog, administrators must create a product catalog hierarchy, assigning first level catalog categories as components. Within each component, the administrator assigns categories and items.

For information on creating product catalog hierarchies, refer to the *Advanced Product Catalog User's Guide*.

For information on the guidelines for using product hierarchies with forecasting, see Product Hierarchies and Forecasting, page F-1.

Setting up Data Quality Management in Trading Community Architecture

Data Quality Management (DQM) is a tool that minimizes the creation of duplicate parties. The match rules that are set for the following profile options to determine the search criteria available to users:

- HZ: Enable DQM Party Search - must be set to Yes to enable customer and contact searches

- HZ: Match Rule for Contact Simple Search - enables contact simple search

- Match Rule for Contact Advanced Search - enables contact advanced search

- HZ: Match Rule for Organization Advanced Search - enables customer search

- HZ: Match Rule for Organization Simple Search - enables customer search

- HZ: Match Rule for Organization Duplicate Prevention

- HZ: Match Rule for Contact Duplicate Prevention

- HZ: Enable Duplicate Prevention at Party Creation

You can change the profile option setting to a different match rule, or modify the currently-set match rule.

The match rules associated with these profile options determine which records trigger an interruption to the create flow for organizations or contacts. The user is warned that the new record resembles one or more existing records and is given the opportunity to select one of the presented existing records instead, if applicable.

See the *Oracle Trading Community Architecture Administration Guide* for more information.

Setting up Preferred Currency

You must set up a preferred currency for Oracle Sales. Oracle Sales uses this default currency for the Sales Dashboard, lead, opportunity, and forecast amounts. To set up your preferred currency, set the profile option JTF_PROFILE_DEFAULT_CURRENCY.

After setting up your preferred currency, you should set up and enable currency conversions. Refer to Setting up and Enabling Currency Conversion, page 4-7 for more information.

Setting up and Enabling Currency Conversion

Oracle Sales requires that currency conversions be enabled so that users can create opportunities and forecasts in the necessary currency.

In order to enable currency conversions, you must:

- Setting up Currency Codes, page 4-7

- Setting up the Accounting Calendar, page 4-8

- Setting up Calendar Types, page 4-8

- Setting up Type Mapping, page 4-8

- Setting up Profile Options for Multiple Currency, page 4-9

- Setting up Reporting Currencies, page 4-9

- Entering GL Daily Conversion Rates, page 4-10

- Entering Currency Conversion Rates for Periods, page 4-10

Setting Up Currency Codes

To set up currency codes:

Login

Oracle Forms

Responsibility

System Administrator

Navigation

Application > Currency

Refer to the *Oracle General Ledger User Guide* for information on setting up currency codes.

Setting up the Accounting Calendar

To set up the accounting calendar:

Login

Oracle Forms

Responsibility

General Ledger Super User

Navigation

General Ledger > Setup > Financials > Calendars > Accounting

For information on setting up the accounting calendar, refer to the *Oracle General Ledger User Guide*.

Setting up Calendar Types

Calendar types are used in forecasting and currency conversion.

To set up calendar types:

Login

Oracle Forms

Responsibility

General Ledger Super User

Forms Navigation

General Ledger > Setup > Financials > Calendars > Types

For information on setting up calendar types, refer to the *Oracle General Ledger User Guide*.

Setting up Type Mapping

To set up type mapping:

Login

Self Service

Responsibility

Sales Administrator

Navigation

Administration > Globalization > Type Mapping

Steps

1. Select the same calendar you designated in the profile option OS: Forecast Calendar.

2. In the first blank Period Type field, select a period type for which you want to set the conversion rates.

3. Select the Conversion Type.

4. Enter a description.

5. Select the *Updateable* and *Deletable* boxes if you want to allow the currency conversion rates to be changed in the Pseudo Period Rates window. See Entering Currency Conversion Rates for Periods (Pseudo Period Rates), page 4-10.

Setting Profile Options for Multiple Currency

Certain profile options are required for multiple currency.

Login

Oracle Forms

Responsibility

System Administrator

Navigation

Profiles > System

Set the following profile options:

• OS: Date Mapping Type

• OS: Forecast Calendar

• OS: Maximum Roll Days for Converting Amount

Refer to Profile Options, page A-1 for more information on the profile options required for multiple currency.

Setting up Reporting Currencies

Currency conversions in Oracle Sales are based on reporting currency setups.

> **Note:** When selecting values for the REPORTING_CURRENCY lookup, you should select all FND currencies that you are currently using for Oracle Sales.

Login

Oracle Forms

Responsibility

Oracle Sales Administrator

Navigation

Oracle Sales Setup > Lookup Codes > Sales

Steps

1. Query for the Lookup Type REPORTING_CURRENCY.

2. Enter additional currency codes that you want available when a user is creating an opportunity.

3. Enter the effective dates.

4. Select the **Enabled** checkbox.

5. Save your work.

Entering GL Daily Conversion Rates

To search for and enter GL daily conversion rates:

Login

Oracle Forms

Responsibility

General Ledger Super User

Navigation

General Ledger > Setup > Currencies > Rates > Daily

For information on entering GL daily conversion rates, refer to the *Oracle General Ledger User Guide*.

Entering Currency Conversion Rates for Periods (Pseudo Period Rates)

To forecast in multiple currencies, you must enter currency conversion dates for periods.

Steps

1. Follow the steps for the procedure Setting up Type Mapping, page 4-8 to enter the types of conversion rates you use for each period type for the calendar you selected.

2. Set the system profile option OS: Date Mapping Type by choosing whether you want to use the daily rate from the start or end date of a period for the currency conversion.

3. Follow the steps for the procedure Defining Currency Rates for Periods, page 4-10 to search for the conversion rates that have been entered for your periods. Enter any missing conversion rates.

Defining Currency Rates for Periods

To define currency conversion rates for periods:

Login

Self Service

Responsibility

Sales Administrator

Navigation

Administration > Globalization > Period Rate

Steps

1. To search for Pseudo Period Rates:

   1. Select a calendar.

   2. Enter the full or partial name of the period name, using % as a wildcard, and click **Go**.

3. Select the period name and click **Select**.

4. Select Start or End date from the Mapping Date radio buttons.

5. Click **Search**.

2. To create a new period rate:

   1. Select the Period Name.

   2. Select the currency to convert From.

   3. Select the currency to convert To.

      The Conversion Type is automatically populated based on the Period Name list of values.

   4. Enter a rate.

   5. The *Updateable* and *Deletable* boxes display if the pseudo period rates can be changed. If you need to change the status of these boxes, click the Type Mapping link.

3. Click **Update**.

4. Run the following concurrent programs:

   • Refresh AS_PERIOD_DAYS table

   • Refresh Multi-Currency Conversion Rates (AS_PERIOD_RATES)

For detailed information on running concurrent programs, refer to the *Oracle Applications System Administrator's Guide*.

Setting up Leads Management

Leads Management is a Marketing module that enables users to capture, evaluate, and distribute leads for follow up. Leads help to identify a customer's level of interest by tracking customer and contact information, product interest information, and ranking information. The Oracle Leads Management Rules Engine evaluates the quality and priority of leads, and then routes leads based on business workflow and best practices.

For information on setting up Oracle Leads Management, refer to the *Oracle Leads Management Implementation and Administration Guide*.

Setting up the Leads Ranking Engines

In Oracle Sales, leads are ranked to indicate their likelihood of converting to opportunities. For example, a hot lead might be ranked *A*, whereas a cold lead is ranked *D*.

To use the lead ranking functionality in Oracle Sales, you must set up and enable the Lead Rules Engine in Oracle Leads Management. The Lead Rules Engine, is comprised on three engines which:

• Determine whether there is sufficient interest

• Grade leads

• Determine the sales channel for the lead, if it is not specified

For information on implementing the Lead Rules Engine, refer to the *Oracle Leads Management Implementation and Administration Guide*.

> **Note:** The Lead Rules Engine provides functionality to automatically route a lead to Marketing. Oracle Sales does not support this functionality.

Additionally, you must set the following profile options:

- OS: Default Qualified Flag for Lead Qualification Engine
- OS: Enable Rule Engine Log
- OS: Execute customer code from lead import
- OS: Escalation Manager for Leads
- OS: Run Lead Monitor Engine
- OS: Maximum Reroutes per leads
- OS: Lead View scorecard data
- OS: Default Channel for Lead Channel Selection Engine
- OS: Default Rating for Lead Rating Engine
- OS: Default Resource ID Used for Sales Lead Assignment
- PV: Run lead duplication rule

Creating Win Probabilities

Win probabilities represent the likelihood of an opportunity closing. You can either use Oracle Sales's predefined win probabilities or define your own. Once these win probabilities are created, the default value for win probabilities can be set by the user through the Sales Default Preferences.

To create new win probabilities:

Login

Self Service

Responsibility

Sales Administrator

Navigation

Opportunities > Win Probability

Enter a value for the win probability. The Win Probability can be any number between 0 and 100. Lower numbers represent weak opportunities, whereas higher numbers represent opportunities that are more likely to close. Enter a meaning and a start date. The To date determines when the win probability is invalid. If you want to remove a win probability, you can end date it or use the enable flag. Click **Update** when complete.

Setting up Sales Stages

Sales stages represent the state of an opportunity or lead in the sales cycle. You can choose to use Oracle Sales's predefined sales stages or create your own.

To create a new sales stage:

Login

Self Service

Responsibility

Sales Administrator

Navigation

Opportunities > Sales Stage

Steps

1. Enter a Subject for the sales stage.

    This value appears in the Sales Stage list of values.

2. Select the Applicability

    The applicability value designates whether the sales stage applies to Leads, Opportunities, or both.

3. Enter the minimum and maximum win probability values for this stage in the Min and Max fields.

4. Enter a start date for this stage in the From field. If you want to remove a sales stage, you can end date it or use the enable flag.

    If you enter a value in the To field, the stage is disabled on that date.

5. Click **Update**.

Setting up Sales Coaches (Sales Supplements)

Sales Coaches are created by setting up Sales Supplements in Oracle Quoting.

> **Note:** When you create a sales supplement templates to use as sales coaches, you must ensure that the templates are created for the application Oracle Sales.

Once sales stages are defined, you can define a sales coach for each stage. The sales coach:

*   Provides text instructions on how the step should be accomplished

*   Helps the sales representative capture important information about the lead or opportunity

For information on setting up sales supplements, refer to the *Oracle Quoting Implementation Guide*.

Setting up Sales Methodologies

Sales Methodologies are used to capture essential information throughout the sales cycle of leads and opportunities.

To set up a sales methodology:

Login

Self Service

Responsibility

Sales Administrator

Navigation

Opportunities > Sales Methodology

Click **Create** and enter the sales methodology name and description. Enter the sequence of the sales stage and select sales stages and the corresponding sales supplement template. Enter the minimum and maximum win probabilities for the sales stage and click **Create**.

After you create the Sales Methodology, Oracle Sales displays the Sales Methodology Details where you can modify the methodology or add additional Sales Stages.

Creating and Modifying Status Codes

Status codes are used to determine the status of a lead or opportunity.

> **Note:** In order for an opportunity to be included in a forecast, the status code must be an Opportunity status and must be Forecastable.

Once these codes are created, the default values for these status codes can be set by the user through the Sales Default Preferences.

To create new status codes:

Login

Self Service

Responsibility

Sales Administrator

Navigation

Steps

1. Click **Create**.

2. Enter a name for the status code.

3. Enter a meaning and description.

4. Select the *Enabled* checkbox to enable the status.

5. Select the *Open* checkbox to signify that the lead/opportunity is open. If this box is not checked, the lead/opportunity is closed and a Close Reason is required.

6. Select the *Include in Forecast* checkbox if you want opportunities that have this status to be included in the forecast.

7. Choose to apply this status to Opportunity, Sales Lead, or both.

8. Indicate whether this status indicates that the deal has been Won, Lost, or Neither.

9. Click **Create**.

To modify a status code:

Login

Self Service

Responsibility

Sales Administrator

Navigation

Opportunities > Status Codes

> **Note:** You cannot modify the Status Code name after the status code is
> created.

Setting up Forecast Categories

Forecast categories allow users to designate what product or service families are
included in forecast. Once these categories are set up, the default values for forecast
categories can be set by the user through the Sales Default Preferences.

Forecast categories are comprised of product categories. Refer to Setting up Forecast
Category Mappings, page 4-15 for more information.

Opportunities are only included in forecasts if the product category on the opportunity
line is mapped to the forecast category selected for the forecast.

To set up forecast categories:

Login

Self Service

Responsibility

Sales Administrator

Navigation

Forecast > Forecast Category

In order for the forecast category to show up, you must stop and restart your web server.

Setting up Forecast Category Mappings

Forecast category mappings group together product categories for a specific forecast
category.

To add product categories to a particular forecast category:

Login

Self Service

Responsibility

Sales Administrator

Navigation

Forecast > Forecast Category Mapping

Set the Defaults for Forecast Amounts

You can set the defaults for forecast amounts (Best, Forecast, Worst) for opportunity lines using the ASN: Forecast Defaulting Type profile option. The default for this profile option is Pipeline; the other valid value is Win Probability.

Opportunity product line forecasts default amounts are calculated using weighted pipeline or win probability range.

If the weighted pipeline is used to calculate forecast amounts, it is used as shown in the table below:

Weighted Pipeline and Forecast Amounts

Status	Best	Forecast	Worst
Forecastable Not Won	Pipeline Amount	Pipeline Amount * Win Probability	0
Forecastable Won	Pipeline Amount	Pipeline Amount	Pipeline Amount
Not Forecastable	Blank and not editable	Blank and not editable	Blank and not editable

If the win probability range is used to calculate forecast amounts, it is used as shown in the table below:

Win Probability Ranges and Forecast Amounts

Status and Win Probability Range	Best	Forecast	Worst
Forecastable Not Won Win Probability < 40%	0	0	0
Forecastable Not Won 40% <= Win Probability < 60%	Pipeline Amount	0	0
Forecastable Not Won 60% < = Win Probability < 80%	Pipeline Amount	Pipeline Amount	0
Forecastable Not Won 80% < = Win Probability	Pipeline Amount	Pipeline Amount	Pipeline Amount
Forecastable Won Win Probability is not applicable in this case	Pipeline Amount	Pipeline Amount	Pipeline Amount
Not Forecastable Win Probability is not applicable in this case	Blank and not editable	Blank and not editable	Blank and not editable

Any manual updates that you make to the Best, Forecast, and Worst amounts will override the values that result from any defaulting that has been set for your organization.

Set the Framework Compatibility Mode

The Oracle Applications profile FND: Framework Compatibility Mode must be set to 11.5.10 at the Application level. This profile must be set to this application version number to enable the use of Oracle Sales. For more information on Oracle Applications Framework profile options, refer to the *Oracle Application Framework Developer's Guide.*

Setting up Daily Business Intelligence

Oracle Daily Business Intelligence (DBI) is a reporting framework that enables managers to see information on their employees' sales activities.

- Mandatory DBI Steps, page 4-18
- Optional DBI Steps, page 4-18

Mandatory DBI Setups

Oracle Sales requires that you implement DBI for Sales Intelligence. DBI for Sales Intelligence is a mandatory entry point for sales managers and Sales Admins using Oracle Sales.

For information on implementing Sales Intelligence, refer to the *Sales Intelligence* chapter of the *Oracle E-Business Intelligence Daily Business Intelligence Implementation Guide.*.

Optional DBI Setups

Optionally, you can also implement the following DBI areas:

- Service Intelligence
- Service Contracts Intelligence

Service Intelligence and Service Contracts Intelligence provide information for the Top Customers bin, Products Under Contract bin, and Service Summary region. You can enable these DBI areas through personalization:

- Top Customers bin on the Dashboard
- Products Under Contract bin on the Update Opportunity, Update Lead, and View/Update Customer pages
- Service Summary region on the Update Opportunity and Update Lead pages

For information on implementing Service Intelligence, refer to the *Oracle Service Intelligence Implementation Guide.* For information on implementing Service Contracts Intelligence, refer to the *Service Contracts Intelligence* chapter of the *Oracle E-Business Intelligence Daily Business Intelligence Implementation.*

Importing Leads

You can import leads using the Oracle Leads Management concurrent program *Import Sales Leads.* The program also imports customers, contacts, and addresses into the Trading Community Architecture tables, if the data does not already exist.

Refer to the *Oracle Leads Management Implementation and Administration Guide* for information on importing leads.

Setting up Dashboard Tables - Leads by Age and Cross-Sell/Up-Sell Campaigns

The Leads by Age table on the Dashboard page displays the number of leads in columns based upon the age of the lead. For optimum performance, limit how far back in time the system goes when calculating the number of older leads. The profile option ASN: Sales Dashboard Leads Aging Bin Period (Days) determines the amount of time in the past that Oracle Sales uses to make these calculations. The default value for this profile option is 90 days. You can modify this number of days to meet your users business needs.

Note that one of the columns in the table displays numbers of leads that are older than 31 days. If you need to change the profile option to a number less than 31, then you should hide this column using personalization.

The Cross-Sell/Up-Sell Sales Campaigns table is controlled by the ASN: Sales Dashboard Sales Campaign Bin Period (Days) profile option. This profile option determines the age

of the sales campaign's leads and opportunities that are displayed in this table. The default value for this profile option is 90. You can modify this value to meet your users business needs. You should consider the average length of time between lead generation, conversion to opportunity, and opportunity closure when defining this profile option. Make sure you provide enough time for the sales cycle to complete for your sales campaigns before they are omitted from the table.

Defining the Sales Funnel

The sales funnel is displayed on the Sales Dashboard and contains four sections that you can link to sales stages of a sales methodology. When your users click on the link in the funnel section, they see a list their opportunities that are in that particular sales stage.

The funnel graphic is limited to four sections, and if this does not meet your users' business needs you can hide the funnel using personalization.

You can assign one or more sales stages to each section of the funnel graphic.

Steps

1. Determine whether you want to assign sales stages from a single sales methodology to the funnel or if you want to assign stages from more than one methodology:

   Single methodology: If there is a single methodology that you want to link to the funnel, go to the Sales Methodology Details page and look at the details for that methodology (see Setting Up Sales Methodologies for more details). Determine which individual sales stages of the methodology should be mapped to each of the four funnel sections. While on this page, note the stage sequence numbers that are displayed for each of the sales stages you wish to assign to the funnel. Be sure to write down these numbers and their associated stages. You must enter these numbers in step 3 of this process.

   Multiple methodologies: If you want to link more than one sales methodology to the funnel, you must create a placeholder methodology that is used to link sales stages to the sales funnel. This methodology will not be used as a real sales methodology, but will used in this process as a container for the sales stages that you want to link to the funnel graphic sections.

   To do this, go to the create sales methodology page and create a new sales methodology. You do not want this methodology to be available to your users, so be sure to enter effective dates (from and to) for this placeholder methodology that are in the past. This automatically makes the new methodology inactive in the system, and your users will not see it in the list of available sale methodologies.

   Now that you have created this inactive sales methodology, you must assign all of the sales stages to it that you will eventually to link to the sales funnel. As you assign the sales stages to your new methodology, you must enter minimum and maximum win probability numbers for each stage. Win probability values are required; enter any value (these values do not have any impact on the sales funnel). Also, enter the stage sequence numbers for each of the sales stages assigned to the methodology. After assigning sales stages to your new methodology, note the stage sequence numbers that are displayed for each of the sales stages you want to assign to the funnel. Be sure to write down these numbers and their associated stages. You must enter these numbers in step 3 of this process.

2. Link the sales methodology from step 1 to the sales funnel. To do this, use the option ASN: Dashboard Funnel Assigned Methodology. This profile option enables you

to search all sales methodologies (both active and inactive) in the system and select which methodology you wish to link to the sales funnel. Search and select the sales methodology defined in step 1 and add it to the profile option. The funnel is then linked to this sales methodology.

3. Designate which stages of the methodology should be mapped to corresponding sections of the funnel. Use the lookup ASN_DASH_SLS_METH_FUNNL_STAGES to accomplish this. Enter this information into the lookup table:

   • In the "Code" column of the lookup, enter the sales stage sequence numbers that you wrote down in step 1 that will be associated with a funnel section. Entered stage sequence numbers are separated by commas (for example, "5, 10, 15" would assign stages with sequence numbers 5, 10, and 15 from the designated sales methodology).

   • In the "Meaning" column of the lookup, enter the text that will be displayed to users in each funnel section. Note that you should keep the text very short so that it will fit in the limited space in the funnel graphic.

   • In the "Tag" column of the lookup, enter the section number of the funnel (this will be a value between 1 and 4) . This will tie the sales stages and display text (described above) to each individual funnel section Table 4-3 shows the contents of a completed lookup table.

Table 4-3 Lookup Codes

Code	Meaning	Description	Tag	From	To
1, 2, 3	Assess		1	01-Feb-2005	
4,5	Identify		2	01-Feb-2005	
6	Propose		3	01-Feb-2005	
7	Close		4	01-Feb-2005	

The first row of the table corresponds to the first section of the funnel. In this example, the first row of the table shows the use of sales stages from multiple methodologies. The values in the Code column assign sales stages with sequence numbers 1, 2, and 3 to the first section of the sales funnel. The first section of the funnel is labeled Assess as shown in the Meaning column. The Description column is not used; ignore this column. The Tag column has a value of 1, indicating that all of the data in this row corresponds to the first section of the sales funnel. Ignore the From and To columns as they have no impact on the funnel.

Setting up Security

Oracle Sales security is controlled by a set of profile options that are grouped into the following categories:

• Customer Access Security

• Lead Access Security

• Opportunity Access Security

Additionally, security differs based on whether the user is a sales representative or a sales manager. Refer to Security Profile Options, page A-6 for more information on the security profile options.

Sales Team

Customers, opportunities, and leads have separate sales teams. Any valid resource can be added to these sales teams, as long as the resource is part of a sales group with the usage type Sales and TeleSales.

Additionally, the resource must have at least one active role in that group.

Sales teams are either assigned manually or using the Territory Assignment Program (TAP). The *Do Not Reassign* flag prevents TAP from reassigning sales team members. By default, this flag is not enabled. However, if a user is added to the sales team when creating a lead or opportunity, the Do Not Reassign flag is selected by default. The *Full Access* flag is automatically selected when a user is added to a sales team. Refer to Setting up the Territory Assignment Program (TAP), page 4-24 for more information on automatically assigning sales teams.

> **Note:** A user-group combination can only be added to a sales team once. A user can be on the sales team multiple times, as long as each instance is for a separate group.

Owner

When a user creates a lead or opportunity, the user is automatically added to the sales team, with the *Do Not Reassign* flag selected, as the *owner*. The *Full Access* flag is automatically checked as well, unless otherwise specified.

> **Note:** A user with access to the lead or opportunity sales team can check or deselect the Owner checkbox to designate if a particular resource should or should not be the lead or opportunity *owner*.

Oracle Sales also supports product-level forecasting within an opportunity. This means that if multiple sales representatives have worked on an opportunity that contains multiple products, the opportunity is forecasted showing all of the product lines and the representative for each product line. As a result, multiple sales representatives can forecast on a single opportunity. This product level forecasting can occur within a sales group, and also across multiple sales groups for the distribution of sales credits.

The type of revenue or non-revenue sales credits is based on the setting of the profile option *ASN: Forecast Sales Credit Type*. Refer to System Profile Options, page A-1 for more information on this profile option.

> **Note:** On an opportunity, if the *owner* receiving revenue forecast credits is removed from the sales team, the forecast credits are passed on to the subsequent *owner*.

In opportunities, the sales team *owner* is mandatory. The Do Not Reassign Flag is automatically checked, ensuring that the owner is not removed by TAP.

Owners are optional for Leads. If an owner is not specified by the user, the *owner* is assigned using TAP.

Customer Access Security

Customer access enables a user to view or update customer information for their customers. A user can only drill into customer and contact details, if that user has access to that customer. Additionally, the user can only update the customer or contact if the user has *Update* access.

- **Full:** The user has Update access for all customers

- **Sales Team:** The user has Update access to all customers for which the sales representative is on the Customer sales team with the Full Access flag selected and read-only access to all customers where the user is on the Customer sales team with the Full Access flag deselected.

Sales Manager Access Levels

Sales manager access is controlled by the ASN: Manager Update Access profile. If the user is a sales manager and there are three additional levels of access:

- **Update data:** Update access to all business objects where the user's subordinates are on the business object sales team

- **Inherit data:** Update access to all business objects where the user's subordinates are on the business object sales team with the Full Access flag selected and Read-only access to all business objects where the user's subordinates are on the business objects sales team with the Full Access flag deselected

- **View data:** Read-only access to all customers where the user's subordinates are on the business objects sales team

Sales Admin Access Levels

Sales Admin access is controlled by the ASN: Sales Admin Update Access profile. If the user is a Sales Admin and there are three additional levels of access, as there are for the sales manager:

- **Update data:** Update access to all business objects where the user's subordinates are on the business object sales team

- **Inherit data:** Update access to all business objects where the user's subordinates are on the business object sales team with the Full Access flag selected and Read-only access to all business objects where the user's subordinates are on the business objects sales team with the Full Access flag deselected

- **View data:** Read-only access to all customers where the user's subordinates are on the business objects sales team

The Sales Admin can have an access level that is the same as, but not higher than, that of the sales manager. When setting the ASN: Sales Admin Update Access, take into account the setting for the ASN: Manager Update Access profile. Be sure that the Sales Admin has access that is either equal to or less than that of the sales manager. Table 4-2 lists examples of relative settings of these two profiles that can result in the Sales Admin role having higher access than the sales manager.

Table 4-2 Sales Manager and Sales Admin Access Profile Settings

Profiles	Profile Settings	Results
ASN: Sales Admin Update Access ASN: Manager Update Access	Update View	Sales Admin has Update access, which is a higher access level than the sales manager's View access. Change the sales manager's access to Update, or change the Sales Admin's access to View.
ASN: Sales Admin Update Access ASN: Manager Update Access	Update Inherit	Sales Admin might have a higher level of access depending on what level inherited by the sales manager. Change the sales manager's access to Update, or change the Sales Admin's access to View.
ASN: Sales Admin Update Access ASN: Manager Update Access	Inherit View	Sales Admin might have a higher level of access depending on what level inherited by the sales admin. Change the sales manager's access to Update, or change the Sales Admin's access to View

Lead Access Security

There are two levels of access to leads:

- **Full:** The user has Update access for all leads

- **Sales Team:** The user has Update access to all leads for which the sales representative is on the Lead sales team with the Full Access flag selected and read-only access to all leads where the user is on the Lead sales team with the Full Access flag deselected.

If the user is a sales manager and there are three additional levels of access. See Sales Manager Access Levels for details. Also, there are three additional levels of access for the Sales Admin. See Sales Admin Access Levels for details.

Opportunity Access Security

There are two levels of access to opportunities:

- **Full:** The user has Update access for all opportunities.

- **Sales Team:** The user has Update access to all opportunities for which the user is on the opportunity sales team with the Full Access flag selected and read-only access for all opportunities on the Opportunity sales team with the Full Access flag deselected.

If the user is a sales manager and there are three additional levels of access. See Sales Manager Access Levels for details. Also, there are three additional levels of access for the Sales Admin. See Sales Admin Access Levels for details.

Setting up Time Zones

You can define time zone information for phone number area codes for all phone numbers used in Oracle Sales. This is achieved by creating or updating area codes for a specific country in Oracle Trading Community Architecture.

Responsibility

Trading Community Manager

Navigation

Relationships > Party

Steps

1. Search for phone code (area code).

2. Map area code to time zone.

For complete information on setting up setting up time zone information, refer to the *Oracle Trading Community Architecture Administration User Guide.*

Setting up the Territory Assignment Program (TAP)

Oracle Sales uses the Territory Assignment Program (TAP) to automatically assign sales teams to opportunities, leads, and customers based on preset rules. If you choose not to implement TAP, you can manually enter sales team members and owners.

TAP can be executed in one of the following methods:

- **Online (real-time) Mode:** Automatically assigns resources to transactions as they are created, if one of the following profiles is set to *Yes*:

    - OS: Enable Real Time Customer Assignment

    - OS: Enable Real Time Opportunity Assignment

    - OS: Enable Real Time Lead Assignment

    Online TAP is called only when a user attempts to save changes.

- **Batch Mode:** You must run the concurrent program *Assign Territory Access.* There are two batch modes available:

    - Total Mode: Processes all records and territories.

    - New Mode: Processes changes made since the last time you ran the concurrent program *Assign Territory Access*.

In order to use TAP, you must perform the following steps:

- Prerequisites for Online TAP, page 4-24

- Prerequisites for Batch Mode TAP, page 4-26

- Setting up Resource Teams and Groups for TAP, page 4-26

- Running Concurrent Programs, page 4-28

- Setting Profile Options, page 4-30

- Selecting Transaction Qualifiers, page 4-30

Prerequisites for Online TAP

If using Online TAP, you must set up territories in Oracle Territory Manager before proceeding with TAP implementation.

Setting up Territories

You must create territories in Territory Manager before using TAP. You can create territories based on:

- Postal code

- Area code

- Country

- Company size

> **Note:** TAP supports Employee as a category of resources, as well as Partner and Partner Contact for the Entity Account.

You must create territories under the Oracle Sales and TeleSales folder in the Navigator, using one or more of the following transaction types:

- Account

- Lead

- Opportunity

After defining territories, you must run the concurrent program *JTF: Generate Territory Packages*. This concurrent program ensures that your changes occur. Run this program every time a territory is added or changed.

For information on setting up territories, refer to the *Oracle Territory Manager User Guide*.

Additional Prerequisites for TAP

To ensure that Real Time Customer Assignment works properly, the following profiles must be set:

- HZ: Execute API Callouts must be set to *Y*

- OS: Enable Real Time Customer Assignment must be set to *Y*

Navigate to Workflow Administrator Web Applications.

Under Workflow Administrator Web Applications, click Find Event Subscriptions and then search for events. See the Oracle Workflow User's Guide for details on Workflow.

Change the phase as described in Table 4-5:

Table 4-5 Phases for Real Time Customer Assignment

Event	Function	Phase
oracle.apps.ar.hz.ContactPoint.create	hz_crmhk_pkg.create_contact_point_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.ContactPoint.update	hz_crmhk_pkg.update_contact_point_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Location.update	hz_crmhk_pkg.update_location_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Organization.create	hz_crmhk_pkg.create_organization_post	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Organization.update	hz_crmhk_pkg.update_organization_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Person.create	hz_crmhk_pkg.create_person_post	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Person.update	hz_crmhk_pkg.update_person_pre	1
	hz_event_elt.hz_param_delete	2
oracle.apps.ar.hz.Relationship.create	hz_crmhk_pkg.create_party_relationship_pre	1
	hz_crmhk_pkg.create_party_relationship_post	2
	hz_event_elt.hz_param_delete	3
oracle.apps.ar.hz.Relationship.update	hz_crmhk_pkg.update_party_relationship_pre	1
	hz_crmhk_pkg.update_party_relationship_post	2
	hz_event_elt.hz_param_delete	3

Prerequisites for Batch Mode TAP

Batch Mode TAP is based on the implementation of Oracle CRM Application Foundation. After implementing CRM Application Foundation, you can proceed with setting up TAP.

Setting up Resource Teams and Groups for TAP

Resource Groups and Sales Groups must be set up in CRM Foundation to use this feature with TAP.

> **Note:** Avoid setting up resources with no groups. If a sales representative without a sales group is assigned using TAP, TAP inserts the sales representative with a Null sales group. Be sure to set up TAP so that it does not encounter resources without sales groups.

Sales Group Support in TAP

When a sales group is assigned to a territory, members of the group are added to the sales team if:

- Sales Group usage is *Sales and TeleSales*

- Member is an Employee and has a Sales role

The following members of a group are not added to the sales team:

- Members who belong to a parent or child of the group

- Inactive members

- Members who are not Employees

- Members with inactive Sales roles

- Member already exists on the sale team for the same group (in case of customer sales team, same group having default role)

The following changes occur only when TAP is run in Total mode. New mode TAP cannot handle these changes unless JTF Resources writes the changes in jtf_terr_rsc_all.

- If a member is removed or added to the sales group

- If a member is disabled

- If the group usage is changed

When a group is removed or added to a territory, the changes take effect after TAP is run in Total mode or New mode. Online TAP inherits this functionality as well.

Resource Group Support in TAP

A resource group consists of:

- One or more resources

- Sales groups

When a resource group is assigned to a territory, members of the sales group are added to the sales team and:

- Member is an Individual and Employee, and has a Sales role, or

- Member is a group and:

  - Usage of group is Sales, and

  - Member of the group is an Employee with a Sales role

The following members of the resource group are not added to the sales team:

- Inactive members

- Members who are not Employees

- Members that do not have Sales roles

- Members with inactive Sales roles

- Members that already exist on the sales team for the same group (in case of customer sales team, the same group having a default role)

- Groups without sales Usage members who belong to a parent or child of the group (is members is a group)

The following changes occur only when TAP is run in Total mode. New mode TAP cannot handle these changes unless JTF Resources writes the changes in jtf_terr_rsc_all.

- If resource group is disabled
- If resource group usage is changed
- If a member is removed or added in the resource team of the sales group which is a member of the resource team
- If the group is disabled
- If the group Usage is changed

When the resource group is removed or added to a territory, the changes take effect after TAP is run in Total mode or New mode. Online TAP inherits this functionality as well.

Running Concurrent Programs

Batch Mode TAP requires that you run the concurrent program *Assign Territory Accesses*. Depending on need, this concurrent program launches a second concurrent program, *Generate Territory Access*, that processes individual territory assignments.

When implementing TAP, run the following concurrent programs:

- JTF: Generate Territory Packages
- Assign Territory Accesses (ASTATA)

JTF: Generate Territory Packages

After defining territories, you must run this concurrent program to ensure that your changes take effect. Run this program every time a territory is added or changed.

JTF: Generate Territory Packages does the following:

- Builds the API that returns the winning territories, which are defined in territory setup
- Creates a search index for faster performance
- Starts named account catchall workflow processing
- Refreshes territory administration portals for Sales

Responsibility

Oracle Sales Administrator

Navigation

Concurrent Requests > Run

Steps

1. Select **Single Request**.
2. Enter *Generate%* and click **Find**.
3. Select *Generate Territory Packages*.
4. In the Parameter region, enter the following information:
   - Usage: Oracle Sales and TeleSales

- Transaction Type: Leave the field blank to include all three transaction types: account, lead, opportunity.

- Debug Flag: No

- SQL Trace: No

5. Click **Submit**.

Assign Territory Accesses (ASTATA)

When run in Total Mode, ASTATA populates the JTF input tables (JTF_TAE_1001_ ACCOUNT/OPPOR/LEAD_TRANS) with active customers, opportunities, and leads. A user hook is available before and after this concurrent program.

Responsibility

Oracle Sales Administrator

Navigation

Concurrent Requests > Run

Steps

1. Select **Single Request**.

2. Enter *Assign%* and click **Find**.

3. Select *Assign Territory Accesses*.

4. In the Parameter region, enter the following information:

- Run Mode: Total

- Debug Flag: Yes

- SQL Trace: Yes

- Lead Status: Open

- Opportunity Status: Open

- User Hook Parameter 1

- User Hook Parameter 2

- User Hook Parameter 3

> **Note:** If you implemented user hooks that pass information that require parameters, select the user hooks here. No information passes if you have not implemented user hooks.

5. Click **Submit**.

This process spawns the concurrent program Generate Access Records.

Generate Access Records (ASTGAR)

This program automatically runs after ASTATA.

ASTGAR calls the JTF API, which populates the winning territory table (JTF_TAE_1001_ACCOUNT/OPPOR/LEAD_WINNERS) based upon territory definitions. The program then inserts, updates, or deletes AS_ACCESSES_ALL and AS_TERRITORY_ACCESSES tables to make assignments.

Setting Profile Options

The following profile options must be set when implementing TAP. Refer to System Profile Options, page A-1 for more information.

- HZ: Execute API Callouts
- OS: Disable Batch Mode Lead Assignment
- OS: Enable Real Time Customer Assignment
- OS: Enable Real Time Lead Assignment
- OS: Enable Real Time Opportunity Assignment

Selecting Transaction Qualifiers

Territories contain qualifiers. These qualifiers are parameters that TAP uses to assign opportunities, leads, and customers to a sales resource. For example, state = California or Opportunity Amount > 50,000. You can use multiple qualifiers to define a territory.

Table 4-6 displays transactions qualifier names, types, sales attributes, and operators supported by TAP.

Table 4-6 Attributes for Qualifiers

Name	Type	Sales Attribute	Support Operator
Account Classification	Account	Interest of "party site"	=
Account Code	Account	Customer Name + Address (party site ID)	=
Account Hierarchy	Account	"Subsidiary of" a particular organization	=
Area Code	Account	Area Code	=, BETWEEN
City	Account	City	=
County	Account	County	N/A
Country	Account	Country	N/A
Customer Category	Account	Customer Category	N/A
Customer Name	Account	Customer Name	N/A
Customer Name Range	Account	Customer Name Range	=, BETWEEN, LIKE
DUNS Number	Account	DUNS Number	N/A
Number of Employees	Account	Total Employees	=, BETWEEN
Postal Code	Account	Postal Code	=, BETWEEN
Province	Account	Province	=
SIC Code	Account	SIC Code	=
Sales Partner Of	Account	Partner Of	=
State	Account	State	=

Name	Type	Sales Attribute	Support Operator
Budget Amount	Lead	Budget	=, BETWEEN
Lead Product Category	Lead	Product Category	=
Lead Inventory Item	Lead	Inventory Item	=
Lead Promotion Identifier	Lead	Source Name	=
Purchase Amount	Lead	Amount	=, BETWEEN
Sales Channel	Lead	Sales Channel	N/A
Opportunity Channel	Opportunity	Sales Channel	=
Opportunity Classification	Opportunity	Classification	=
Opportunity Product Category	Opportunity	Product Category	=
Opportunity Inventory Item	Opportunity	Inventory Item	=
Opportunity Status	Opportunity	Status	=
Total Amount	Opportunity	Total	=, BETWEEN
Product Category	Quoting	Product Category	=

Setting up Marketing Source Codes

Source codes are unique identifiers that indicate the source of a lead or opportunity. For example, *Campaign for Upgrades* would be the source code for a lead generated based on a marketing campaign.

You can set up additional source codes in Oracle Marketing. For more information, see the *Oracle Marketing Implementation Guide*.

Setting up Sales Campaigns

Sales campaigns are marketing tools that help to disseminate information about a company's products, services, offers, and messages to existing and potential customers. Campaigns consist of a campaign and a campaign schedule. Campaign schedules indicate the start and duration of an active sales campaign. Campaign schedules can be set up to repeat weekly, monthly, quarterly, or yearly. Refer to the *Oracle Marketing Implementation Guide* for more information.

Oracle Sales users can create sales campaign schedules within Oracle Sales, but the sales campaigns referenced in these schedules are created in Oracle Marketing. The Create Campaign page enables users to create and execute campaign schedules through a variety of marketing channels. Although users can create campaign schedules in Oracle Sales, administration tasks are performed within the Campaign Workbench in Oracle Marketing. To access the Campaign Workbench for administration purposes, administrators must be assigned the Campaign Workbench Super User responsibility.

Campaign schedules use templates that are purpose and channel driven. The Campaign Workbench provides a seeded Sales template, which defaults in to the Oracle Sales user interface.

> **Note:** Although you can define new, sales-related campaign schedule templates in the Campaign Workbench, you can only use the seeded Sales template in Oracle Sales.

Administrators can customize this template in the Campaign Workbench by:

- **Adding or changing the Activity Purpose:** The Activity purpose for the seeded sales template is hard coded to the value Cross-Sell. If you do not customize this template, the Cross-Sell activity purpose is always selected for your campaign schedules.

- **Selecting a Default List Template for each Activity Purpose:** Includes lists from Audience Workbench setup

- **Adding or removing components:** Determine which tabs appear and what actions users can or cannot perform

When a sales representative is creating a campaign schedule, they have the option to include:

- Products

- Target Accounts

- Sales Kits

In the Target Accounts region, users can select a list template. List templates are defined in the Audience Workbench of Oracle Marketing. Lists allow users to determine the audience for a campaign.

> **Note:** If a list template is defaulted in the Target Accounts region, the schedule template has been set up with a default list template.

Administrators must be assigned the following responsibility to administer lists:

- Audience Workbench Super User

When a user is creating a campaign schedule, they have the option of associating Sales Kits, also known as collaboration content, from Oracle Content Manager or Oracle Proposals. This content is set up in the respective application, and these modules must be properly implemented for the content to be available for campaign schedules. For information on setting up content in Oracle Content Manager, refer to the *Oracle Marketing Implementation Guide*. For information on setting up Proposals, refer to the *Oracle Proposals Implementation Guide*.

Setting up Competitor Information

Within an opportunity, a sales representative can select competitor information for a product. Competitor product information is set up in Oracle Marketing, and can be defined for a particular inventory item, for an entire category of products, or for both.

For information on setting up competitor information, refer to the *Oracle Marketing User Guide*.

Setting up Quoting

Oracle Sales integrates with Oracle Quoting to allow users to convert opportunities to quotes, and eventually orders. If integrated, a Create Quote button appears on the Opportunity page. Once you click this button, you are taken to Quoting.

> **Note:** You can create multiple quotes from a single opportunity.

After the quote is created, you can access it through a link in Oracle Sales. The opportunity name is referenced in the quote as well.

To enable Oracle Sales integration with Oracle Quoting, you must perform these mandatory steps:

Steps

1. Set the profile *ASO: Disable HTML UI Sidebar Menu* to Yes at the Responsibility level.

2. Set the profile *ASO: Enable OSO Integration* to *No* at the Application level for Oracle Sales.

For complete information on implementing and setting up Oracle Quoting, refer to the *Oracle Quoting Implementation Guide*.

Setting up Proposals

Oracle Sales integrates with Oracle Proposals to allow users to generate proposals from leads or opportunities. With Oracle Proposals, Oracle Sales users can create and send proposals to customers, including opportunity information and customized collateral. Clicking the Create Proposal button takes the user to the Proposals application. After the proposal is created, users can access it through a link in Oracle Sales. The opportunity name is referenced in the proposal as well.

> **Note:** Be sure to exclude the function ASF_TRANS_FORWD from the any user responsibility that you assign. This is to ensure proper navigation between Oracle Sales and the proposals functionality.

For information on setting up Oracle Proposals, refer to the *Oracle Proposals Implementation Guide*.

Setting up Projects

Oracle Projects provides project managers with the ability to manage the schedule, resources, finances, issues, and other aspects of their projects. Oracle Sales integrates with Oracle Projects allowing project managers view projects associated with an opportunity and to capture the costs related to the pursuit of opportunities.

You must use personalization to enable the Projects table on the Proposals and Quotes Tab on the Update Opportunities page.

For information on setting up Oracle Projects, refer to the *Oracle Projects Implementation Guide*.

Setting up Partners

Oracle Sales integrates with Oracle Partners to provide sales representatives with the capability to determine the sales channel for a lead or opportunity. Partners functionality is available through personalization and can appear on the Partners Tab and the header section on the Update Opportunity page. Partner sales team information is also displayed on the Sales Team tab on the Lead and Customer details pages.

For steps for setting up Oracle Partners to integrate with Oracle Sales, refer to the *Oracle Partner Management Implementation Guide.*

Setting up Incentive Compensation

Oracle Sales uses the functionality of Oracle Incentive Compensation to enable users to view sales commissions. For steps for setting up Incentive Compensation, refer to the *Oracle Incentive Compensation Implementation Guide.*

Users click **Commission Statement** in the Sales Dashboard Shortcuts to view a statement. The statement includes a balance summary showing balances, earnings, recoverable and non-recoverable amounts, payments due, and ending balances.

Setting up Attachments

Oracle Sales uses the attachments functionality provided by Oracle Applications Framework to provide users with attachments capability for opportunities, leads, customers, and contacts. These attachments can include text, external documents and web addresses.

Refer to the *Oracle Applications Framework Personalization Guide* for more information.

Setting up Notes, Tasks, and Calendar

Oracle Common Applications provides a set of components that can be used by all Oracle CRM applications. Oracle Sales uses the Oracle Common Application Calendar, Notes, and Tasks to help sales representatives manage daily activities. Implementation of these modules is optional. Refer to the *Oracle Common Application Components Implementation Guide* for complete setup information.

- Setting up Notes, page 4-34
- Setting up Tasks, page 4-35
- Setting up Calendar, page 4-35

Through integration with Pumatech, Inc.'s IntelliSync® for Oracle, you can synchronize the Oracle Calendar and tasks with your Outlook calendars and handheld devices. Refer to *Palm and Outlook Synchronization* in the *Oracle Common Application Components Implementation Guide.*

Setting up Notes

Through integration with Notes, Oracle Sales users can enter notes regarding leads, opportunities, and forecasts so that all members of the sales teams are updated on important information. The user can also create and view notes regarding the customer and the contacts for the lead or opportunity.

Notes are categorized into note types. You can select to use predefined note types or create your own.

For complete information on implementing and setting up Notes, refer to *Oracle Common Application Components Implementation Guide.*

Login

Oracle Forms

Responsibility

CRM Administrator

Navigation

Notes Setup > Note Type Setup

Refer to the *Setting up Notes* section of the *Oracle Common Application Components Implementation Guide* for setup information.

Setting up Tasks

Through integration with Tasks, Oracle Sales users can both create and view existing tasks that are associated with leads or opportunities. Tasks are also displayed on the Sales Dashboard.

Tasks are categorized into task types. You can choose to use predefined task types or create your own.

Do not perform personalization in both the task region in the Details Tab and in the Notes and Tasks tab. Perform personalization in either area, but not both. You can personalize the display of Description and Name information shown in the References table for the task.

For complete information on implementing and setting up Tasks, refer to *Oracle Common Application Components Implementation Guide.*

Login

Oracle Forms

Responsibility

CRM Administrator

Navigation

Task and Escalation Manager > Setup

Refer to the *Implementing the Oracle Applications Framework Based Task Manager* section of the *Oracle Common Application Components Implementation Guide* for setup information.

Setting up Calendar

Integration with Calendar enables users to conveniently access appointments on the Sales Dashboard. The Sales Dashboard displays the full list of appointments for a given date and enables users to create new appointments by selecting a link to Oracle's calendar tool.

For complete information on implementing and setting up Calendar, refer to *Oracle Common Application Components Implementation Guide.*

Login

Oracle Forms

Responsibility

CRM Administrator

Navigation

Calendar > Calendar Setup

Refer to the *Implementing the Oracle Applications Framework Based Calendar* section of the *Oracle Common Application Components Implementation Guide* for setup information.

Setting up Customer Classifications

Oracle Sales uses the general and industrial classifications that are set up in Oracle Customer Online Administration. These classifications are based on lists of government-generated classifications for types of businesses. These classifications are listed in the Classifications Tab on the Customer Update page. Refer to the *Oracle Customer Online Implementation Guide* for details.

Setting Up Web ADI to Enable Forecast Opportunity Export

Oracle Sales enables users to export opportunities from the Forecast page to a spreadsheet using Web ADI functionality. This enables the users to quickly download to a spreadsheet all opportunities that match the forecast parameters criteria using the Export Opportunities button.

> **Note:** Be sure that the Web ADI profile option BNE_UIX_PHYSICAL_ DIRECTORY is set to contain the path to the UIX (Cabo) libraries that are used to generate the Web ADI user interface. Also, be sure to have your users set their Internet browser security setting for "Initialize and script ActiveX controls not marked as safe" to "Prompt". For details on the purpose of setting the ActiveX controls, refer to the *Web Applications Desktop Integrator Implementation Guide* Frequently Asked Questions for more information.

Refer to the *Web Applications Desktop Integrator Implementation Guide* for more information.

Setting up Opportunity History Tracking

Oracle Sales enables users to access history for leads and opportunities. History tracking for leads is automatically enabled, and cannot be turned off. History tracking for opportunities is initialized using a concurrent program and profiles. Thereafter, the profile options can be used to turn history tracking off and on. Use personalization to make history tracking available to users (the history pages and the View History button as well).

Access to history information is allowed to users who have access to lead and opportunity information.

Opportunity history tracking is shown in three tables on the Opportunity History page:

- Opportunity

- Products

- Non-Revenue

Steps

1. In order to enable opportunity history and make the history information tables available to the user, you must set the profiles listed in Table 4-7 as indicated.

Table 4-7 Opportunity History Tracking Profile Settings

Profile	Setting	History Tracking Table Enabled
OS: Enable Tracking Opportunity History Data	Yes	Opportunity
OS: Enable Tracking Purchase Line History Data OS: Enable Tracking Sales Credits History Data	Yes Set both to Yes to enable product history tracking. Set both to No to disable this tracking.	Products
OS: Enable Tracking Purchase Line History Data OS: Enable Tracking Sales Credits History Data	Yes Set both to Yes to enable non-revenue history tracking. Set both to No to disable this tracking.	Non-Revenue

2. Set the profile OS: Time Frame for Opportunity Logs to Null.

3. Run the Initial Load of Opportunity Log Tables concurrent program

This program should be run only when you initialize history tracking. Be sure that all three of the history tracking profiles are set to yes before running the concurrent program. After the program has run, you can use the profiles to disable selected portions of history tracking.

For detailed information on running concurrent programs, refer to the *Oracle Applications System Administrator's Guide*.

Defining Descriptive Flexfields

Descriptive flexfields are customizable, blank fields on the Oracle Sales forms that allow the application developer to define additional fields as needed. A descriptive flexfield is composed of segments, each of which has a prompt and can have either a valid set of values or data entered by the user. Once you have defined the flexfields, personalize the respective region to make the flexfields available in the user interface.

Oracle Sales supports these flexfields for customer-related pages:

- Party information (Customer Create, View, and Update pages)

- Party site information (Customer and Contact Create and Update pages)

- Telephone number information (Customer and Contact phone, e-mail, and websites)

Oracle Sales supports flexfields at the following levels for both leads and opportunities:

- Header level

- Line level

- Contacts level

- Sales team level

These are the names of the supported flexfields:

- Sales Leads (lead header level)

- Sales Leads Contacts (lead contact level)

- Sales Lead Lines (lead line level)

- Opportunities (opportunity header level)

- Opportunity Contacts (opportunity contact level)

- Opportunity Lines (opportunity line level)

To ensure that flexfields carry over when a lead is converted to an opportunity, the flexfield definitions for the following must be consistent:

- Sales Leads and Opportunities

- Sales Leads Contacts and Opportunity Contacts

- Sales Lead Lines and Opportunity Lines

The same flexfield definition (Accesses) is used for Sales Team for Lead, Opportunity, and Customer.

For information on setting up and modifying flexfields, refer to the *Oracle Applications Flexfield Guide*.

Specifying Flexfields

To specify values for flexfields:

Login

Oracle Forms

Responsibility

Application Developer

Navigation

Flexfield > Descriptive > Segments

Steps

1. From the navigator, select **Flexfield > Descriptive > Segments**.

2. For opportunity flexfields, query for the application *Sales Foundation*, and search for the individual flexfield by name.

   For leads flexfields, query for the application *Sales Foundation*, with the Title *Leads%*.

3. Enter flexfield information as described in the *Oracle Application Developer's Guide*.

4. Set up flexfield segments and map the segments to attributes.

5. Save your work.

6. Log in to Oracle Sales as System Administrator and perform the necessary personalization to display the flexfields in the user interface.

Setting up Lead and Opportunity Searches

Different search restriction is enforced for Sales Reps and Sales Manager to address different search requirements and achieve reasonable search performance.

A sales representative must enter the following information in order to perform a search unless the search is based on the lead or opportunity number:

*   Status Category

*   At least one selective search criteria

A sales manager must enter the following information in order to perform a search on opportunities unless the search is based on opportunity number:

*   Status

*   Close Date Quarter information

*   At least one selective search criteria

To search for leads, a sales manager must enter the following information unless the search is based on lead number:

*   Status

*   Age

*   At least one selective search criteria

You can personalize the selective search criteria to enforce different search restrictions based on the data pattern in your organization. By default, due the size limitation of simple search panel, the definition of selective search criteria is different for simple search panel and the advanced search panel. Different selective search criteria are also defined for lead and opportunity searches by sales representatives and sales managers to address different search requirement and achieve reasonable search performance

In addition, the user cannot perform a query with duplicate non-date or non-numeric type of search parameters, for example, a customer name.

Personalizing the User Interface

Using OA Core framework personalization, you can customize the Oracle Sales user interface. The ability to personalize is controlled by the profile option **Personalize Self-Service Defn**.

There are five levels of personalization:

*   **Function:** Affects all users with a particular function

*   **Localization:** Affects all end users for a particular location

*   **Site:** Affects all users of the current installation

*   **Organization:** Affects all users for a particular business unit (Org)

*   **Responsibility:** Affects all users within a particular responsibility.

For example, you can customize the user interface in the following ways:

- Determine the number of rows displayed in a table

- Add unique product branding, such as a logo

- Hide or show region, fields, and entire tables

- Change the order of regions and fields on a page

- Sort data in tables

- Change field labels and region headers

- Make fields mandatory

- Make fields read-only

- Totals for table columns (when available)

- Use cascading style sheets

- Define default values

- Provide tip text

- Add fields to a region

For complete information on customizing the user interface, refer to the *OracleApplications Framework Personalization Guide*.

Personalizations on the Sales Dashboard Page

Configurable Sales Dashboard Page

Sales Dashboard page is configurable and implemented with flexible layout. Only if User Accessibility is set to None for the logged in user, the page layout personalization page is supported. Otherwise, the page hierarchy personalization page with H-Grid form is displayed. For more details, see the *Oracle Applications Framework Personalization Guide*.

Top Opportunities and Top Customers Tables

Top Opportunities and Top Customers tables on Sales Dashboard page are hidden by default. To enable the Top Opportunities and Top Customers tables on the Sales Dashboard, you must add the contents corresponding to these tables under the appropriate layout using the Page Layout Personalization page of the Sales Dashboard.

Leads and Opportunities Links - Shortcuts

You can use personalization to enable the Leads and Opportunities links in the Shortcuts on the Sales Dashboard.

Personalizing the Lead and Opportunity Pages

Details Tab

Some tabs on the update pages are combined into one Details tab. If you choose to use the Details tab to display information, use personalization to disable the tabs whose information is contained in the Details tab.

Lead and Opportunity History Tracking

The View History buttons on Lead and Opportunity Details pages are hidden by default; use personalization to make it available. See Setting Up Opportunity History Tracking for details.

Budget Amount for Lead

The Budget Amount for leads is hidden by default; use personalization to make it available.

Lead and Opportunity Response Channel

The Response Channel is hidden by default for both leads and opportunities; use personalization to make it available

Projects Table - Opportunity Details

You can enable the Projects table, which is located on the Proposals and Quotes Tab on the Update Opportunity page, through personalization.

Contributor in Opportunity Sales Team

Contributor information is hidden by default in Opportunity Sales Team; use personalization to make it available.

Line-Level Forecasting Support for Opportunity Products

You can use personalization to add line-level (product-level) forecasting for opportunity products. This enables the display of Revenue and Non-Revenue information in addition to the default Competitor information on the Products Tab for Opportunities.

1. Enable the View menu under the Product subtab on the opportunity details page.

2. In the FND lookup type ASN: Display Opportunity Products Additional Information, enable the lookup code FRCST_DTLS.

Personalizing Forecasting Pages

Sales Group Column for Sales Manager's Forecast

You can enable the Sales Group column in the Direct Reports Forecast detail and Opportunity Forecast detail for sales managers through personalization.

Forecast Type and Revenue Type Forecast Parameters

You can enable these parameters on the Forecast page to support line-level (product-level) forecasting through personalization.

Enable Win Probability and Close Date Columns - Forecasting

You can enable these columns and summaries on the Opportunity Forecast Detail page through personalization.

Export Buttons on Forecast Page

Use personalization to enable the Export Opportunities button on the Forecast page to enable the download of multiple opportunities into a Web Applications Desktop Integrator (Web ADI) driven spreadsheet with dynamic download capability. Also, the Export button on the Opportunity Forecast Details region is enabled through personalization.

Personalizing Customer and Contact Searches

Personalization for Customer and Contact Searches

You can personalize the customer and contact search pages. To do this, modify the match rules that control which search parameters are displayed to users.

Note that only the Name and Related Organization search parameters on the contact search pages search directly on the contact record. All other secondary parameters such as Email Address, Phone Number, City and so on search against the person party. If your organization does not populate these person party fields then you might want to remove these secondary search parameters. You might also want to hide the Advanced Search button using Oracle Applications Framework personalization tools if you determine the advanced search page does not provide sufficient functionality beyond what is available on the simple search page.

Personalizing the Customer Region

In the Customer Search Result region of Oracle Sales, there are two regions, although the user sees only one table. When personalizing this page, you must ensure that the following two regions are identical, or the data presentation in the user interface is inconsistent:

- ASNSrchResultsRN
- ASNDQMSearchResultsRN

Add Do Not Call Preference for Contacts

You can add a Do Not Call preference for contacts who specify that they do not want to receive telemarketing calls. There is a Restrictions column available on Contact pages that shows a flag if the contact has requested calling restrictions. This Restrictions column can be enabled on these pages:

- Contact Summary (Phone Numbers, Contact Information, Contacts)
- Contact Summary - Read Only (Phone Numbers, Contact Information, Contacts)
- Contact Update (Phones Numbers, Contacts)
- Primary phone number with restriction in Contact Summary

  Contact Information in the Contact Summary page has two primary phone number items. By default, the Message Styled Text: Primary Phone is displayed without restrictions. You can personalize it to show the primary phone with restrictions by rendering the Message Layout: Primary Phone.

- Restrictions on Contact and Contact Summary

  The Restrictions column in the Contacts and Phone Numbers tables on the Contact pages; use personalization to make it available.

Customer and Contact Business Activities Plug-Ins

Consultants can provide customized views of business activities for a customer or contact using a plug-in. See Customer and Contact Business Activities, page H- 1 for details.

Export Functionality Support

The Export button for the view-based leads and opportunities tables on the Sales Dashboard and Customer/Contact searches is hidden by default; use personalization to make it available.

Enabling Flexfields In Oracle Sales

Header-Level Flexfields Support - Lead and Opportunity

Header-Level Flexfields information is displayed under Additional Information subtab on Lead/Opportunity Details pages and is hidden by default; use personalization to make it available.

Note: Subtab related personalization, for example, changing a label or display order or hiding or showing a subtab, must be performed at both the Stack Layout and Subtab layout levels.

Header-Level Flexfields information is hidden by default on Lead and Opportunity Create pages; use personalization to make it available.

Line Level Flexfield Support for Lead and Opportunities

Line-Level Flexfields are supported for customer/lead/opportunity sales team, lead/opportunity products and contacts. Line-Level Flexfields information is hidden by default; use personalization to make it available.

To enable the line level flexfields for opportunity products:

1. Enable the View menu under the Product subtab on the opportunity details page.

2. In the fnd lookup type ASN: Display Opportunity Products Additional Information, enable the lookup code ADD_INFO.

Personalizing Lead and Opportunity Searches

Administer Personalization of Views

You can create lead and opportunity saved views that are available to all users. Specifics on how to accomplish this are beyond the scope of this document, but can be found in the *Oracle Applications Framework Personalization Guide*.

User Personalization of Views

Oracle Sales enables users to save sets of search criteria as views. These views control the display of data in the Leads and Opportunities tables on the Sales Dashboard, and on the Lead and Opportunity view pages. Users can create personalized views or use the seeded views or the views created by the administrator. Seeded views that are provided with Oracle Sales are described in Seeded Views, page C-1.

To create a view, the user clicks Personalize in the Leads and Opportunities tables on the Sales Dashboard, or on the Lead and Opportunity view pages. The user can choose to duplicate or update an existing view, or to create a new view. Users can duplicate, but not update, seeded views. By clicking Create View, the user accesses the Create Views page, and can enter criteria for the new view. Users can also delete or disable views.

For leads and opportunities, users can click **Save Search** to save the search criteria from simple or advanced searches as a view.

Once created, the view name populates the View menu. Note that users can create separate views for the view-enabled leads and opportunities bin on the Sales Dashboard page and for the lead and opportunity views pages. For example, if the user is on the Sales Dashboard page, and clicks the Personalize button in either the Lead or Opportunity bin, the Personalize Views page displays and all views that are created are available only on the Sales Dashboard. The same logic applies to the Views page. Views created on this page apply only to the Views page, and not to the Sales Dashboard.

Personalization of Search Parameters and Display Columns

You can personalize the search parameters that are available on the leads and opportunities search pages. The simple search panels have a seeded set of search parameters displayed by default, and there are additional parameters that are hidden when you first install Oracle Sales. Using the Oracle Applications Framework personalization tools, you can hide or display individual search parameters that are most important to your organization. The advanced search panels can also be personalized in a similar manner. You can also use the personalization tools to determine which search fields are selective fields (at least one selective field must be entered by a user before the query can be run).

Also, you can personalize the display columns that are available on the lead and opportunity search pages.

Enabling Oracle Partners and Oracle Sales Integration

The integration of Oracle Partners and Oracle Sales Integration is hidden by default. See the *Oracle Partners Implementation Guide* for details.

Personalizing at the Region Level

Currently not all Oracle Sales pages are implemented with a flexible layout. If Oracle changes these pages to use a flexible layout in the future releases, one possible issue is that the previous page-level personalizations that were performed might be omitted because Oracle Framework no longer applies these personalizations properly. To avoid this issue, Oracle recommends that personalizations be performed at the region level instead of page level.

Note that for business activities regions all the personalization must be done at the region level.

A
Profile Options

This appendix covers the following topics:

- Oracle System Profile Options
- Oracle Sales Dashboard Profile Options
- Oracle Sales Forecast Profile Options
- Oracle Sales Leads and Opportunities Profile Options
- Oracle Sales Security Profile Options
- Oracle CRM Foundation Profile Option
- Oracle Field Sales Profile Options
- Oracle Quoting Profile Options
- Oracle Receivables Profile Option
- Oracle Trading Community Architecture Profile Options
- Multi Organization (MO) Profile Option
- Oracle Applications Framework Profile Option

Oracle System Profile Options

This appendix provides information on the system profile options used by Oracle Sales. The procedure for setting up and changing system profile options is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

> **Note:** Profile options with an asterisk are mandatory. Profile options with a double asterisk are conditionally mandatory.

Oracle Sales Dashboard Profile Options

Table A–1 lists by name and in alphabetical order the profiles that apply to the Sales Dashboard.

Table A-1 Sales Dashboard Profile Options

Profile Name	Description	Level	Default
*ASN: Currency Conversion Period Type	Determines the period type used for currency conversion. **Note:** You must set the profile ASN: Forecast Calendar and then logout and log back in before setting this profile option.	SARU	N/A
**ASN: Dashboard Funnel Assigned Methodology	Determines the ability to search all sales methodologies (active and inactive) in Oracle Sales and select which methodology to link to the sales funnel.	S	N/A
*ASN: Default Lead Status	Determines the status for newly-created leads unless otherwise specified by the user. Available values include statuses set up with the applicability "Lead" selected and the Open flag selected.	SARU	N/A
ASN: Sales Dashboard Leads Aging Bin Period (Days)	Determines the amount of past time that Oracle Sales uses to make calculations of the number of older leads. This profile controls the leads that are displayed in the Leads by Age table on the Sales Dashboard.	SAR	90
ASN: Sales Dashboard Sales Campaign Bin Period (Days)	Determines the age of sales campaigns that are displayed in the Cross-Sell/Up-Sell Sales Campaigns table on the Sales Dashboard.	SAR	90

Oracle Sales Forecast Profile Options

Table A–2 lists by name and in alphabetical order the profiles that apply to the forecasting.

Table A-2 Forecast Profile Options

Profile Name	Description	Level	Default
ASN: Default Forecast Category	Determines the default forecast category on the forecast screen. The default value for this profile can be set by the user through the Sales Default Preferences.	SARU	N/A
ASN: Default Forecast Period Type	Determines the default Period on the forecast screen. You must set ASN: Forecast Calendar before setting this profile option. The default value for this profile can be set by the user through the Sales Default Preferences.	SARU	N/A
**ASN: Default Non-Revenue Credit Type	Determines the default credit type used in the non-revenue table for non-revenue forecasting. Is the sources for parameters values for the Non-Revenue Type forecast parameter. The default values for this profile can be set by the user through the Sales Default Preferences.	SARU	Values are based on Sales Credit types defined in Order Management.
ASN: Default value for maximum number of opportunities displayed for forecasting purpose	The default number of opportunities to display in the Opportunity Worksheet Detail.	SU	N/A
*ASN: Forecast Calendar	Determines the GL Calendar from which period types and periods are selected. **Note:** You must set this profile before setting ASN: Default Forecast Period Type and ASN: Currency Conversion Period Type.	S	N/A

Profile Name	Description	Level	Default
*ASN: Forecast Calendar Month	Determines the number of periods that are displayed in the forecast parameter Period menu.	S	N/A
ASN: Forecast Defaulting Type	Determines the defaulting logic for forecast values in the opportunity. Valid values are Pipeline and Win Probability. See Set the Defaults for Forecast Amounts, page 4-16 for more details.	SARU	Pipeline
ASN: Forecast Display Decimal	Determines whether the amounts shown in forecasts contain decimal places. Set this profile to Yes to enable the display of decimal increments in forecast data. The user-level value for this profile can be set by the user through the Sales Default Preferences.	SARU	No
*ASN: Forecast Sales Credit Type	Determines the credit type used for revenue forecasting.	S	N/A

Oracle Sales Leads and Opportunities Profile Options

Table A–3 lists by name and in alphabetical order the profiles that apply to the leads and opportunities.

Table A-3 Leads and Opportunities Profile Options

Profile Name	Description	Level	Default
ASN: Default Close Date Days	Determines the default close date (in number of days) when creating an opportunity unless otherwise specified by the user. The default value for this profile can be set by the user through the Sales Default Preferences.	SARU	30

Profile Name	Description	Level	Default
*ASN Default Lead Status	Determines the status for a newly-created lead unless otherwise specified by the user. Available values include statuses set up with the applicability "Lead" selected and the Open flag selected.	SARU	N/A
ASN: Default Opportunity Sales Channel	Determines the default sales channel when creating an opportunity unless otherwise specified by the user. The default value for this profile can be set by the user through the Sales Default Preferences.	SARU	N/A
*ASN: Default Opportunity Status	Determines the default opportunity status when creating an opportunity unless otherwise specified by the user. Available values are based on statuses set up with the applicability "Opportunity" selected and Open flag selected. The default value for this profile can be set by the user through the Sales Default Preferences.	SARU	N/A
*ASN: Default Opportunity Win Probability	Determines the default win probability when an opportunity is created unless otherwise specified by the user. The default value for this profile can be set by the user through the Sales Default Preferences.	SARU	N/A

Profile Name	Description	Level	Default
**ASN: Default Non-Revenue Credit Type	Determines the default credit type used in the non-revenue table for non-revenue forecasting. Is the source for parameter values for the Non-Revenue Type forecast parameter. The default value for this profile can be set by the user through the Sales Default Preferences.	SARU	Values are based on Sales Credit types defined in Order Management.
ASN: Default Win/Loss Status	Determines the win/loss status when a competitor product is added to an opportunity unless otherwise specified by the user. Values are based on the lookup ASN: Win/Loss Status.	SARU	None
ASN: Forecast Defaulting Type	Determines the defaulting logic that is executed in the opportunity unless otherwise specified by the user. Also determines the forecast values defaulting logic in the opportunity.	SARU	Pipeline
*ASN: Forecast Sales Credit Type	Determines the credit types used for revenue forecasting.	S	N/A
ASN: Number of Close Date Quarters Displayed	Determines the number of quarters displayed for a close date.	S	3
* ASN: Worksheet Reports Directory	Determines the directory for Sales Coach Worksheet Report source files.	S	N/A

Oracle Sales Security Profile Options

Table A–4 lists by name and in alphabetical order the profiles that apply to security.

Table A-4 Security Profile Options

Profile Name	Description	Level	Default
ASN: Customer Access Privilege	Determines which customers a user can access. If set to Sales Team, a user can only access customers where the user is on the sales team with the Full Access flag selected. If the flag is not selected, the user has read-only access. If set to Full, a user can access all customers.	SARU	Sales Team
ASN: Lead Access Privilege	Determines which leads a user can access. If set to Sales Team, a user can update leads where the user is on the sales team with the Full Access flag selected. If the flag is not selected, the user has read-only access. If set to Full, a user can access all leads.	SARU	Sales Team
ASN: Manager Update Access	Determines the level of access a manager has to subordinate's leads, opportunities, and customers. If set to View Data, the manager can only view their subordinate's leads, opportunities, and customers. If set to Update Data, the manager can update their subordinate's leads, opportunities, and customers. If set to Inherit Data, the manager inherits the subordinate access. If the subordinate has view-only access, the manager can only view the leads, opportunities, and customers of the subordinate. If the subordinate has update access, the manager can update leads, opportunities, and customers of the subordinate. If the manager has multiple subordinates, the manager inherits the highest level of access.	SARU	Update Data
ASN: Opportunity Access Privilege	Determines the level of access a user(s) has to opportunities. If set to Sales Team, a user can update opportunities if they are on the sales team with the Full Access flag selected. If the full access flag is not selected, the user has read-only access to the opportunities. If set to Full, a user can access all opportunities.	SARU	Sales Team

Profile Name	Description	Level	Default
ASN: Sales Admin Forecast Update Access	Determines whether a user with the Sales Admin responsibility can create, update, and submit forecasts for a sales manager. Set to Yes to enable the Sales Admin to update a sales manager's forecasts. The Sales Admin has view only access to a manager's forecast details unless the profile option ASN: Sales Admin Forecast Update Access is set to Yes. Note that even with the ASN: Sales Admin Forecast Update Access profile set to Yes, the Sales Admin will not be able edit the sales manager's owned opportunities on the Forecast page. The Sales Admin can edit the opportunities by drilling down to the opportunity page depending on the setting of the ASN: Sales Admin Update Access profile.	SARU	No
ASN: Sales Admin Update Access	Determines the level of access a sales administrator has to a sales manager's sales group's leads, opportunities, customers and contacts.	SARU	View Data
	If set to View, the Sales Admin has read-only access to those business objects to which the sales manager of the Sales Admin's sales group (or groups) has access.		
	If set to Update, the Sales Admin has update access to those business objects to which the sales manager of the Sales Admin's sales group (or groups) has access.		
	If set to Inherit, the Sales Admin has the highest level of access that a subordinate of the sales manager of the Sales Admin's sales group (or groups) has on the business object sales team.		

Oracle CRM Foundation Profile Option

Table A–5 lists the CRM Foundation profile option that must be set during Oracle Sales implementation.

Table A-5 CRM Foundation Profile Option for Oracle Sales

Profile Option	Description	Level	Default
*JTF_PROFILE_ DEFAULT_ CURRENCY	Determines the default currency in the HTML user interface.	SARU	N/A

Oracle Field Sales Profile Options

Table A–6 lists the Oracle Field Sales profile options that must be set during Oracle Sales implementation.

Table A-6 Oracle Field Sales Profile Options

Profile Name	Description	Level	Default
OS: Assign New Lead	If set to No, TAP engine is always called to assign the first available resource as lead owner before defaulting lead owner to profile OS: Default Resource ID used for Sales Lead Assignment. If set to Yes, TA P engine is not involved in lead owner assignment. **NOTE:** This profile should be set to No, so that TAP engine is always used for lead assignment.	S	No
OS: Auto Convert Lead to Opportunity	Controls the automatic conversion of a lead to an opportunity. Set to Yes to enable qualified leads to automatically convert to opportunities.	S	Yes
OS: Auto Run Lead Engines While Update	Determines whether the lead engines are automatically run when the lead is updated.	S	Yes
OS: Date Mapping Type	Determines date mapping type.	S	N/A
OS: Default Channel for Lead Channel Selection Engine	Determines the default for each lead if no channel selection rules evaluate to true.	S	Direct

Profile Name	Description	Level	Default
OS: Default Close Date Days	Determines the default for the opportunity close Date in days (Value + Current Date = Opportunity Close Date). Close date is required for opportunity creation. If the close date is not specified, the profile must be set to a positive integer value.	SARU	150
OSO: Default Forecast Currency	Determines the default currency for forecasting.	SARU	USD
OS: Default Opportunity Sales Stage	Determines the default used for the sales stages for an opportunity using a sales methodology.	SARU	Stage 1
OS: Default Opportunity Status	Determines the default status of a new opportunity.	SARU	Preliminary
OS: Default Opportunity Win Probability	Determines the default value for the win probability field.	SARU	10
OS: Default Qualified Flag for Lead Qualification Engine	The default Qualification flag is used when none of the qualified rule sets are matched.	S	N/A
OS: Default Rating for Lead Rating Engine	Determines the default rank if no ranking rules evaluate to true.	S	Cold Lead

Profile Name	Description	Level	Default
OS: Default Resource ID Used for Sales Lead Assignment	Determines the default Resource ID to which the Territory Assignment Program assigns ownership of a lead, if the program does not find a matching territory for the lead. If this profile is not set, ownership of unassigned leads is automatically assigned to the user creating or importing the lead, if the user has a valid sales role. If the user does not have a valid sales role assigned, unassigned leads are not accessible. Do not set this profile value to Null.	S	N/A
OS: Default Sales Channel	Determines the default value for the sales channel field for an opportunity.	SARU	Direct
OS: Default Status for Leads	Determines the default status for leads.	SRU	New
OS: Disable Batch Mode Lead Assignment	If set to Yes, then TAP concurrent program Assign Territory Accesses does not assign resources to leads. If set to No, the program assigns resources to leads.	S	Yes
OS: Enable Real Time Customer Assignment	If set to Yes, then resources are assigned as soon as a transaction is created or updated.	S	No
OS: Enable Real Time Lead Assignment	If set to Yes, then resources are assigned as soon as a transaction is created or updated.	S	No
OS: Enable Real Time Opportunity Assignment	If set to Yes, then resources are assigned as soon as a transaction is created or updated.	S	No

Profile Name	Description	Level	Default
OS: Enable Rule Engine Log	If set to *Y*, inserts in to pv_entity_rules_applied table whenever the lead engine is running. If set to *N*, does not insert any data.	S	Y
OS: Enable Tracking Opportunity History Data	Enables opportunity history tracking if set to Yes.	S	No
OS: Enable Tracking Purchase Line History Data	Enables product and non-revenue history tracking if set to Yes. The OS: Enable Tracking Sales Credits History Data profile must also be set to yes to enable this history tracking. To disable this tracking, set both profiles to No.	S	No
OS: Enable Tracking Sales Credits History Data	Enables product and non-revenue history tracking if set to Yes. The OS: Enable Tracking Purchase Line History Data profile must also be set to yes to enable this history tracking. To disable this tracking, set both profiles to No.	S	No
OS: Escalation Manager for Leads	Set this profile when one resource is set as an escalation manager. If Max number of reroutes are reached, an e-mail is sent to the escalation manager about the same.	S	N/A
OS: Execute custom code from lead import	Controls the invocation of a custom user hook that can be executed for each record in lead import batch. If set to *No*, the hook is not executed.	SAR	Y
OS: Forecast Calendar	Determines the name of the calendar you are using to manage your forecasts	S	N/A
OS: Hash Area Size for TAP	Set this profile 100000000 or more.	S	N/A

Profile Name	Description	Level	Default
OS: Lead Incubation Channel	Oracle Sales does not support incubation channel. This profile should not have a value set.	S	N/A
OS: Lead Link Status	Determines the status of the lead after linking the lead to an opportunity.	S	Converted to Opportunity
OS: Lead View scorecard data	Determines if users can view the Score Card Mapping and rank data.	SARU	N
OS: Maximum Reroutes per lead	Determines the maximum number of reroutes allowed to a lead that is timed out by the monitoring engine during automatic assignment.	S	3
OS: Maximum Roll Days for Converting Amount	Maximum Roll Days for Converting Amount if no conversion rate for a day.	S	N/A
OS: Opportunity Sales Credit Enforced Sales Team Definition	Set to Yes to keep the forecast credit assignee on the sales team for opportunities. This profile must be set to Yes for Oracle Sales to interoperate with Oracle TeleSales.	SARU	Yes
OS: Preferred Reporting Currency	Preferred currency for denorm programs	S	US Dollar
PV: Run lead deduplication rule	Controls execution of a new rule based on lead duplication. If set to No, lead duplication does not occur.	S	Y
OS: Run Lead Monitor Engine	Is set to Y, the lead is processed by the monitoring engine after it is created or updated.	S	Y

Profile Name	Description	Level	Default
OS: Sales Lead Default Close Reason	The Update Sales Lead API assigns statuses to leads based on the value in the OS: Lead Link Status profile. If the status in the profile is Closed, the API picks up the value in this profile.	S	N/A
OS: Sort Area Size for TAP	Set this profile to 100000000 or more.	S	N/A
OS: Time Frame for Opportunity Logs	Determines the time frame for opportunity logs used for opportunity history tracking. Set to Null for history tracking in Oracle Sales.	S	Null
OS: Use DQM Rule code to match Contact	Determines whether the imported lead record is a duplicate.	SARU	N/A
OS: Use DQM Rule code to match Party	Determines whether the imported lead record is a duplicate.	SARU	N/A
OS: Use DQM Rule code to match Person	Determines whether the imported lead record is a duplicate.	SARU	N/A

Oracle Quoting Profile Options

Specific Oracle Quoting profile options must be set during Oracle Sales implementation. For more information on Oracle Quoting profile options, refer to the *Oracle Quoting Implementation Guide*.

Table A–7 lists the description and default value for the Quoting profile options that must be set during implementation.

Table A-7 Quoting Profile Options for Oracle Sales

Profile Option	Description	Level	Default
ASO: Disable HTML UI Sidebar Menu	Disables the left hand menu in the Oracle Quoting user interface. Must be set to *Yes*, if integrating with Oracle Sales.	R	N/A
ASO: Enable OSO Integration	Set this profile to *No* if integrating with Oracle Sales.	SA	No

Oracle Receivables Profile Option

A specific Oracle Receivables profile option must be set during Oracle Sales implementation. For more information on Oracle Receivables profile options, refer to the *Oracle Receivables Implementation Guide*.

Table A–8 lists the description and default value for the Receivables profile option that must be set during implementation.

Table A-8 Receivables Profile Option for Oracle Sales

Profile Option	Description	Level	Default
HZ: Execute API Callouts	If the value is set to Yes, then changes made to the customer records are considered while TAP processing in New Mode. The value must be set to Yes for TAP New Mode to work.	SARU	No

Oracle Trading Community Architecture Profile Options

Specific Oracle Trading Community Architecture (TCA) profile options must be set during Oracle Sales implementation. For more information on Oracle TCA profile options, refer to the *Oracle Trading Community Architecture Administration User Guide*.

Table A–9 lists the description and default value for the TCA profile option that must be set during implementation.

Table A-9 TCA Profile Options for Oracle Sales

Profile Option	Description	Level	Default
HZ: Display Certification Level	Determines whether the certification level is displayed to the user. This profile setting applies to all Oracle applications that are using the TCA certification feature.	S	No

Profile Option	Description	Level	Default
HZ: DQM Resolution for Party Name Searches That Exceed Maximum Number of Results	Determines the DQM search behavior. The default is Prompt User for Additional Search Criteria and the other valid value is Perform Standard SQL Search. The default retains the existing behavior, which performs a query based on the DQM match rules setup. When this profile is set to Perform Standard SQL Search, if the number of results returned by the DQM intermedia query is greater than the threshold value defined in the profile option: HZ: Maximum Number of Match Results, then it will perform and return results using a regular SQL query.	SARU	Prompt User for Additional Search Criteria
HZ: Enable DQM Party Search	Determines whether DQM is enabled for organization and person searches. Set this profile to Yes only if you provide a match rule for other TCA profiles.	SAR	No
HZ: Enable Duplicate Prevention at Party Creation	Determines if duplicate prevention is enabled for organizations, persons, both, or neither. You can enable for organizations or persons only if you provide the appropriate match rules. NOTE: Oracle Sales only supports Organization searches.	SAR	Disabled

Profile Option	Description	Level	Default
HZ: Match Rule for Contact Advanced Search	Determines the seeded or user-defined match rule for determining the search criteria and results for the contact advanced search. Note: In Oracle Sales, this profile is used when searching contacts for a given organization. If you use a match rule in this profile, set the profile HZ: Enable DQM Party Search to Yes.	SAR	HZ_PERSON_ADV_ SEARCH_RULE
HZ: Match Rule for Contact Simple Search	Determines the seeded or user-defined match rule for determining the search criteria and results for the contact simple search. Note: In Oracle Sales, this profile is used when searching contacts for a given organization. If you use a match rule in this profile, set the profile HZ: Enable DQM Party Search to Yes.	SAR	HZ_PERSON_SIM PLE_SEARCH_RULE
HZ: Match Rule for Contact Duplicate Prevention	Determines the seeded or user-defined match rule for identifying potential duplicates of the contact that the user is creating. Use match rules with the Search type. If you use a match rule in this profile, set the profile HZ: Enable DQM Party Search to Yes.	SAR	SAMPLE: SEARCH
HZ: Match Rule for Organization Advanced Search	Determines the seeded or user-defined match rule for determining the search criteria and results for the organization advanced search. If you use a match rule in this profile, set the profile HZ: Enable DQM Party Search to Yes.	SAR	HZ_ORG_ADV_ SEARCH_RULE

Profile Option	Description	Level	Default
HZ: Match Rule for Organization Duplicate Prevention	Determines the seeded or user-defined match rule for identifying potential duplicates of the organization that the user is creating. Use match rules with the Search type. If you use a match rule in this profile, set the profile HZ: Enable DQM Party Search to Yes.	SAR	SAMPLE: SEARCH
HZ: Match Rule for Organization Simple Search	Determines the seeded or user-defined match rule for determining the search criteria and results for the organization simple search. If you use a match rule in this profile, set the profile HZ: Enable DQM Party Search to Yes.	SAR	HZ_ORG_SIMPLE_ SEARCH_RULE
HZ: Maximum Number of Match Results	Determines the maximum number of matching records from a match rule. If the acquisition component of any match rule provides more than this number of records, the process that is using the match rule would result in error.	SARU	200
HZ: Reference Territory	Specifies the default territory used in determining the appropriate address style formats. If this profile is left blank, then the current session's NLS Territory setting is used. This profile also controls whether an address is considered domestic or foreign, for showing or hiding the country name.	SARU	N/A

Multi Organization (MO) Profile Option

Verify or set the **MO: Operating Unit** profile option to the appropriate operating unit at the responsibility level. Mandatory profile option.

Oracle Applications Framework Profile Option

This Oracle Application Framework profile option must be set during Oracle Sales implementation to run Oracle Sales. For more information on Oracle Applications Framework profile options, refer to the *Oracle Application Framework Developer's Guide*.

Table A–11 lists the description and default value for the Oracle Applications Framework profile option that must be set during implementation.

Table A-11 Oracle Applications Framework Profile Option for Oracle Sales

Profile Option	Description	Level	Default
*FND: Framework Compatibility Mode	Sets the software version number for compatibility mode. Oracle Sales requires this profile to be set to 11.5.10. You can set it at the corresponding application level if you do not want to change the site level setting.	SA	N/A

B

Seeded Lookup Types

This appendix covers the following topics:

- Overview of Lookup Types

Overview of Lookup Types

This appendix contains information on the seeded Oracle Sales lookup types.

If lookups have **System** level access you can modify the meaning and description.

If lookups have **User** level access, you can:

- Change the meaning and description
- Change the tag (sort sequence)
- Disable a lookup

Table B-1 lists descriptions and access levels for seeded Oracle Sales Lookup Types (QuickCodes).

Table B-1 Oracle Sales Lookup Types

Lookup Type	Description	Access Level
ASN_ACCESS_PRIVILEGE	Determines options for the security profile options	System
ASN_BUSINESS_ACTS	Determines the options available in the business activities selection dropdown.	User
ASN_CONTACT_ACTIONS	Determines the actions available in the contact table for leads and opportunities.	User
ASN_CONTACT_ROLE	Determines the options shown in the Contact Role menu for both leads and opportunities.	User
ASN_CUSTOMER_ACTIONS	Determines the actions available in the customer details page.	User

Lookup Type	Description	Access Level
ASN_DASH_SLS_METH_ FUNNL_STAGES	Determines the stage mapped to each funnel section of the Sales Funnel in the Sales Dashboard.	User
ASN_FRCST_FORECAST_TY PE	Determines the options for the forecast type (Revenue and Non-Revenue).	System
ASN_FRCST_DEFAULTING_ TYPE	Determines the values for the Forecast defaulting profile option.	System
ASN_FRCST_FORECAST_ STATUS	Determines if the forecast is created in Saved or Submitted status. Available values are Saved and Submitted.	System
ASN_FRCST_MAX_OPPTY_D ISPLAYED	Determines the maximum number of opportunities that can be displayed in forecasting.	System
ASN_FRCST_MGR_WS_DEF_ OPTIONS	Determines the defaulting options for Sales Manager worksheet.	System
ASN_FRCST_REP_WS_DEF_ OPTIONS	Determines the defaulting options for Sales Representative worksheet.	System
ASN_FRCST_WORKSHEET_ TYPE	Determines the type of the worksheet in the forecast worksheet header table.	System
ASN_LEAD_AGE	Determines the number of days to be used in searches that are based on the age (in days) of a lead.	User
ASN_LEAD_CLOSE_ REASON	Determines the options shown in the Lead Close Reason menu. **Note:** Do not disable the close reason *Converted to Opportunity.*	User
ASN_LEAD_HIST_HDR	Determines the Lead Header fields for which history is tracked.	System
ASN_LEAD_VIEW_NOTES	Determines the filter options displayed in the lead View Notes feature.	System
ASN_OBJECT_TYPE	Identifies the Sales product objects.	System
ASN_OPPTY_CLOSE_ REASON	Determines the options shown in the Opportunity Close Reason menu.	User

Lookup Type	Description	Access Level
ASN_OPPTY_CMPT_FLEX_DISPLAY	Determines the display of opportunity products additional information.	User
ASN_OPPTY_HIST_HDR	Determines the Opportunity Header fields for which history is tracked.	System
ASN_OPPTY_HIST_NREV	Determines the Opportunity Non-Revenue Credit fields for which history is tracked.	System
ASN_OPPTY_HIST_PROD	Determines the Opportunity Product Line fields for which history is tracked.	System
ASN_OPPTY_VIEW_NOTES	Determines the filter options displayed in the opportunity View Notes feature.	System
ASN_RELATIONSHIP_TYPE	Determines relationship type; required for sales methodology setup	System
ASN_SALESCYCLE_VIEW	Determines the *View* options for the sales cycle.	System
ASN_SERVICE_REQUEST_TYPE	Labels the first two rows in the service summary table.	System
ASN_STAGE_APPLICABILITY	Determines if a methodology stage is valid for a lead, an opportunity, or for both.	System
ASN_STATUS_CATEGORY	Determines whether a lead is open or closed.	System
ASN_TIME_RANGE	Determines the time ranges available to search by in the lead search page	User
ASN_TIME_ZONE	Determines the options for time zone available to search by in the Lead search page.	User
ASN_UPDATE_ACCESS	Determines the options available in the Manager security profile option.	System
ASN_VEHICLE_RESPONSE_CODE	Determines the options available for lead and opportunity response channel.	User
ASN_WIN_LOSS_STATUS	Determines the options shown in the Win/Loss status menu for the opportunity line competitor products.	System
ASN_WIN_PROBABILITY_RANGE	Determines the ranges for win probability.	User

C

Seeded Views

This appendix covers the following topics:

- Overview of Views

Overview of Views

Views are saved sets of search criteria. Users can use the seeded views provided with Oracle Sales, or can create their own views for the Sales Dashboard Lead and Opportunity tables, or for the Lead and Opportunity Views pages.

Table C-1 lists seeded views for leads.

Table C-1 Oracle Sales Seeded Leads Views

View	Description	Columns Displayed	Default Seeded View
My Open Leads (Owner)	Displays open leads where the user is the owner of the lead. Leads are sorted by age (ascending) and 10 rows are displayed.	• Lead Name (links to lead details page) • Primary Contact (links to contact details page) • Customer Name (links to customer details page) • Rank • Status • Age (days) • Local Time • Convert to Opportunity (icon)	Yes
My Open Leads (Sales Team)	Displays open leads where the user on the sales team for the lead. Leads are sorted by age (ascending) and 10 rows are displayed.	• Lead Name (links to lead details page) • Primary Contact (links to contact details page) • Customer Name (links to customer details page) • Rank • Status • Age (days) • Local Time • Convert to Opportunity (icon)	No

Table C-2 lists seeded views for opportunities.

Table C-2 Oracle Sales Seeded Opportunities Views

View	Description	Columns Displayed	Default Seeded View
My Open Opportunities (Owner)	Displays open opportunities where the user is the owner of the opportunity. Opportunities are sorted by updated date (descending) and 10 rows are displayed.	• Opportunity Name (links to opportunity details page) • Customer Name (links to customer details page) • Close Date • Status • Stage • Amount • Currency	Yes
My Open Opportunities (Sales Team)	Displays open opportunities where the user on the sales team for the opportunity. Opportunities are sorted by updated date (descending) and 10 rows are displayed.	• Opportunity Name (links to opportunity details page) • Customer Name (links to customer details page) • Close Date • Status • Stage • Amount • Currency	No

D

Seeded Roles and Responsibilities

This appendix covers the following topics:

- Roles and Responsibilities to Use with Oracle Sales
- Oracle Forms Responsibilities
- Oracle Self Service Responsibilities

Roles and Responsibilities to Use with Oracle Sales

This appendix lists the Oracle Forms and Oracle CRM Applications users and responsibilities necessary to implement Oracle Sales.

You can create new users and responsibilities, and assign responsibilities as needed. See *Oracle Applications System Administrator's Guide, Oracle CRM Technology Foundation Implementation Guide,* and *Oracle CRM Technology Foundation Concepts and Procedures* for more information.

Oracle Forms Responsibilities

Log in with the appropriate user name and responsibility to perform the specified tasks.

Table D-1 lists the responsibilities necessary to perform setup tasks for Oracle Sales in Oracle Forms.

Table D-1 Oracle Forms Responsibilities

Responsibility	Tasks
Application Developer	Set up descriptive flexfields and lookups
CRM Administrator	Set up notes, tasks, and calendar
CRM Resource Manager	Create resources, assign roles to employees, create resource groups
General Ledger Super User	Set up multiple currencies
Oracle Sales Administrator	Run concurrent programs and set Oracle TeleSales lookup codes
Quoting Sales Manager	Set up the sales supplement templates used for sales coaches
System Administrator	Set profile options and create users. Set up currency codes
Trading Community Manager	Set up DQM

Oracle Self Service Responsibilities

Log in with the appropriate user name and responsibility to perform the specified tasks.

Table D-2 summarizes the responsibilities necessary to perform setup and administrative tasks for Oracle Sales in Oracle CRM Applications.

Table D-2 Oracle Self Service Responsibilities

Responsibility	Tasks
Sales Administrator	Set up sales stages, sales methodologies, win probabilities, status codes, and forecasting categories and mappings. Set up type mappings and pseudo period rates for multiple currencies.
Sales Manager	Access the Oracle Sales User interface as a sales manager or Sales Admin. This responsibility is seeded by Sales Intelligence.
Sales User	Access the Oracle Sales user interface as a sales representative. This responsibility should be assigned only to the sales representatives, not to the sales manager or Sales Admin. If a sales manager or Sales Admin is assigned this responsibility, that user will not be able to access the data for any subordinates.

E

Concurrent Programs

This appendix covers the following topics:

- Concurrent Programs and Request Set
- Concurrent Programs
- Request Set - Update as_accesses_all denorm flag

Concurrent Programs and Request Set

This appendix provides information on the concurrent programs used by Oracle Sales. Each concurrent program in this table is also described in the implementation step where it is set.

For a detailed description of the procedures for running concurrent programs and request sets, refer to the *Oracle Applications System Administrator's Guide*.

This section describes the concurrent programs and a request set.

Concurrent Programs

Table E-1 lists by name and in alphabetical order the concurrent programs used by the Oracle Sales.

Table E-1 Concurrent Programs

Concurrent Program Name	Description
Assign Territory Accesses	Assigns new territory access to sales force employees. The program prepares database tables for parallel processing.
	Set the following profile options to 100000000 or more.
	OS: Sort Area Size for TAP
	OS: Hash Area Size for TAP
	Run this program after completing the setups in Setting Up Territory Management, and after the JTF Concurrent program Generate Territory Package has run.
	Parameters:
	Run Mode (New/Total)
	Lead Status: (All/Open/Closed)
	Previous Request ID for restart mode only.
Autocreate Opportunity from Sales lead	Creates opportunities from existing sales leads. This program should be run after the Import Sales Leads program.
	Parameters:
	Debug Mode
	Trace Mode
Flatten Group Hierarchy	Denormalizes the Resource Group hierarchy structure into a flat structure for faster data access.
	Schedule: For about 4000 groups, and average of 10 level hierarchy structure, this program takes about 10-15 minutes. It can be scheduled as a nightly process.
Generate Access Records (ASTGAR)	Runs automatically after Assign Territory Accesses. ASTGAR calls the JTF API, which populates the winning territory table (JTF_TAE_1001_ACCOUNT/OPPOR/LEAD_WINNERS) based upon territory definitions. The program then inserts, updates, or deletes AS_ACCESSES_ALL and AS_TERRITORY_ACCESSES tables to make assignments.
Generate Territory Packages	This concurrent program, available by logging in under the CRM Administration responsibility, builds the API that returns the winning territories which are defined in territory setup. It must be run at least once before you import leads and each time after you modify the territory setup. You need not run this program every time you import leads.

Concurrent Program Name	Description
Initial Load of Opportunity Log Tables	Loads data from he opportunity transaction tables AS_LEADS_LOG, AS_LEAD_LINES_ALL, AS_SALES_CREDITS to the corresponding log tables AS_LEADS_LOG, AS_LEAD_LINES_LOG, AS_SALES_CREDITS_LOG if the transaction data does not have log records in the log tables. The following profile options need to be set to Yes before submitting the concurrent program OS: Enable Tracking Opportunity History Data, OS: Enable Tracking Purchase Line History Data, and OS: Enable Tracking Sales Credits History Data.
OTS: Load Sales Lead Interface Table from Flat File	Imports sales leads from the interface. This program must be run before Auto Create Opportunity from Sales Lead. This moves data from the interface table to AS_SALES_LEADS, AS_SALES_LEADS_LINES, and AS_SALES_LEAD_CONTACTS. If you want to import data from a flat file, you must first run OTS: Load Sales Lead, which moves data from the flat file to the interface table.
Refresh AS_PERIOD_DAYS table	This program must be run before you can run the Refresh Multi-Currency Conversion Rates. This sequence of programs must be rerun if the GL period definitions are changed.
Refresh Multi-Currency Conversion Rates (AS_PERIOD_RATES)	Refreshes refresh the multi-currency conversion rates in setting multiple currency.
Refresh of as_sales_credits_denorm	Used for opportunity reports and forecasting functionality. This program must be run before a user can run opportunity reports and perform forecasting functions.
Refresh of Opportunity Status Aging Summary Table	Refreshes the summary data for opportunities that have been created or updated since the last refresh time.
	This concurrent program was created to extract status log data from AS_LEADS_LOG, calculate the summary data from the log data, and refresh ASO_LOG_STATUS_SUMMARY table with the summary data.

Request Set - Update as_accesses_all denorm flag

The Update as_accesses_all denorm flag request set is run to update the status of an opportunity or a lead from Open to Closed, or from Closed to Open. It updates the denorm flag for AS_ACCESSES_ALL and AS_SALES_LEADS, updating the STATUS_OPEN_FLAG in the AS_SALES_LEADS table and OPEN_FLAG in the AS_ACCESSES_ALL_ALL table under the Oracle Sales Administrator responsibility. Open records are flagged with a Y; Closed records with an N.

There are three stages in this request set. Only the stage 2 concurrent programs require parameters.

There are three concurrent programs in stage 2. These are:

- Update as_accesses_all denorm flag for Leads and opportunity - Main

- Update close_reason for Leads - Main

- Update close_reason for Opportunities - Main

All three programs in stage 2 share the same set of parameters and the parameters need to be supplied only once to be used by all three concurrent programs.

The concurrent programs in stage 2 take five parameters:

- X_OPEN_FLAG - 1 character

- X_STATUS_CODE - 30 characters

  If you know which status codes have changed, then set the parameters to N (if the status has changed from Open to Closed) or Y (if the status has changed from Closed to Open).

  If you do not know which status codes have changed, or want to update all of the access records or leads records, no matter which status has changed, then set the parameters to these values:

  X_OPEN_FLAG - NULL (Empty) X_STATUS_CODE - ALL

The other three parameters control the performance of the programs when large data volumes are processed. If you do not process large data volumes, do not change the default values for these parameters.

- p_num_workers - Number of workers which are spawned by the each of the concurrent programs in stage 2. The default is 2. If data volumes being handled are large this parameter can be increased to 3 or 4.

- p_batch_size - Number of records which are committed by a worker at one time. The default is 10000.

- p_debug_flag - Enables debug messages to be written to logs.

These settings update the flag for all access records or leads records. Note that if you set X_STATUS_CODE to ALL, this request set runs for a long period, depending on the number of access records in AS_ACCESSES_ALL_ALL. This request set creates a temporary index to use while the programs run. Successful index creation requires that the insert and update records functionality is not in use.

F

Product Hierarchies and Forecasting

This appendix covers the following topics:

- General Guidelines
- Product Category Added to Forecast Category
- Parent to Forecastable Category Added Within the Hierarchy
- Child Product Category Node is Moved in Hierarchy and Becomes Forecastable
- Forecastable Product Category Moved Under Non-Forecastable Node
- Forecastable Product Category Child of Another Forecastable Product Category
- Forecastable Product Category Disabled Within the Product Hierarchy
- Forecastable Product Category Flagged as Not Visible to SME
- Forecastable Product Category Deleted From the Product Hierarchy

General Guidelines

This appendix describes how changes to the product hierarchy affect sales forecasting. These are the general guidelines for product hierarchies and forecasting:

- The administrator can map a node at any level in the product hierarchy to a Forecast Category. However, Oracle Sales recommends that the administrator map each Forecast Category to those products in hierarchy nodes that do not have a parent. This ensures that the forecast roll-up is based on the highest level of the product category.

- The administrator can end-date a Forecast Category mapping at any time. It is recommended that the administrator end-date the mapping on a date that is a common denominator for all periods. End-dating mappings in the middle of a period causes the loss of saved and direct report submitted data.

- It is possible to submit a forecast after a forecast period has ended. Users often perform this action to reconcile the forecast with actual orders. If a product category was end-dated prior to the current date, the user cannot adjust the product category forecast for the end-dated product category. In this case, the user should reconcile the individual opportunities in the product category, save the changes, and regenerate the forecast using Current Opportunity defaulting. Upon completion, the user can resubmit the corrected forecast.

    > **Note:** If you want the user to be able to reconcile the forecast for an extended length of time after the period has ended, the administrator

should end-date the mapping on a date soon after the reconciliation period is over. However, this causes the forecast to include Product Categories for the new period until that specified end-date.

Product Category Added to Forecast Category

The administrator can map a new product category to a forecast category. Depending on the start date designated in the forecast category mapping, this change might occur mid-period or at the beginning of the next period.

When mapping a Product Category to a Forecast Category, the administrator should give a start date that reflects the first date of the upcoming period. This prevents confusion, as newly mapped product categories are included in a user's forecast the next time they access the forecast for the given Forecast Category.

Parent to Forecastable Category Added Within the Hierarchy

The administrator can add a new product category within the PLM hierarchy. This product category can be added as the parent of an existing product category.

If adding a new product category, as the parent of another forecastable product category, to the PLM hierarchy, the administrator must:

1. End-date the previously forecastable product category with the current date

2. Add the new product category to the Forecast Category mapping with the current date as the Start date.

Failure to perform these steps causes double counting in the forecast shows incorrect data.

Child Product Category Node is Moved in Hierarchy and Becomes Forecastable

The administrator can move a child product category within the hierarchy, so that it is no longer a child, and is therefore forecastable. The Oracle Sales Administrator must then make this product category forecastable by mapping it to a Forecast Category.

Refer to Product Category Added to Forecast Category , page F-2for guidelines.

Forecastable Product Category Moved Under Non-Forecastable Node

If the administrator moves a product category and its children, making it the child of a non-forecastable product category, there is no change to the forecast category and mappings.

Forecastable Product Category Child of Another Forecastable Product Category

The administrator is not prevented from moving a forecastable product category under another forecastable product category, thereby making it a child. If this action is performed, the parent and child are both mapped to the same forecast category which causes double counting in the Opportunity Forecast Summary and Forecast

Worksheet. Therefore, the system administrator must end-date the mapping of the child product category to the Forecast Category immediately after the product hierarchy is changed.

When end-dating the child category, the system administrator should instruct users to view their latest submission and add the child node's forecast values to the existing forecast values of the parent node, as the saved forecast data for the child node is lost.

Forecastable Product Category Disabled Within the Product Hierarchy

The administrator can disable a forecastable product category within the hierarchy at any time by entering a Disable date.

The system administrator should not end-date the product category - forecast category mapping until the end of the period. If the mapping is disabled, the product category is dropped from the forecast and a user cannot add the Product Category to an opportunity in the future, but lines created before the mapping was disabled are still valid.

Forecastable Product Category Flagged as Not Visible to SME

The administrator can set a *Not Visible* flag for a product category within the hierarchy.

Refer to Forecastable Product Category Disabled Within the Product Hierarchy, page F-3 for guidelines.

Forecastable Product Category Deleted From the Product Hierarchy

The administrator can entirely delete a product category from the product hierarchy, but must end-date the product category forecast category mapping, as the product category is no longer valid for opportunities in the pipeline

The system administrator should end date the product category to forecast category mapping immediately after the product category is deleted from the hierarchy, as opportunity lines that carry that product category become invalid and are no longer forecastable.

G

Oracle Sales - Oracle TeleSales Interoperability

This appendix covers the following topics:

- Oracle Sales - Oracle TeleSales Interoperability
- Setting Corresponding Oracle Sales and Oracle TeleSales Profile Options
- Setting Corresponding Oracle Field Sales and Oracle Trading Community Architecture
- Setting Oracle TeleSales and Leads Profile Options
- Setting Oracle TeleSales and Oracle Sales Lookups
- Personalization Considerations
- Differences Between Oracle Sales and Oracle TeleSales
- Sales Methodology
- Converting Leads to Opportunities
- Customer/Contacts
- Role and Address in Sales Team
- Customer Sales Team
- Rolling Forecast
- Marketing Campaigns/Offers
- Forecast Amounts
- Freeze Flag
- Close Competitor and Comment
- Customer Budget Status
- End Customer and Address
- Projects and Decision Timeframe
- Accepting or Rejecting Leads
- Concurrent Updates
- Forecasting
- Attachments

- Incentive Compensation

- Field Sales Reports Access

- Lead and Opportunity Currency

Oracle Sales - Oracle TeleSales Interoperability

Oracle Sales and Oracle TeleSales are interoperable if these setup steps are performed:

- Setting Corresponding Oracle Sales and Oracle TeleSales Profile Options, page G-2

- Oracle TeleSales and Leads Profile Options, page G-3

- Oracle TeleSales and Oracle Sales Lookups, page G-4

Leads, Opportunities, Forecast, Sales Category, and Call Center need to be set up for use in TeleSales using the following responsibility:

Login

Oracle Forms

Responsibility

TeleSales Administration

Navigation

Administration

Setting Corresponding Oracle Sales and Oracle TeleSales Profile Options

Oracle Sales and Oracle TeleSales each have separate sets of profile options that do not affect the other application. Therefore, when a feature in Oracle TeleSales is dependant on a profile option, setting the TeleSales profile option does not affect Oracle Sales. You must set the corresponding Oracle Sales profile option separately.

> **Note:** Corresponding profile options might have slightly different values. You should choose a value supported by both, if you want the behavior to be the same. Additionally, there might be TeleSales profile options for which there are no corresponding Oracle Sales profile options. You should set these profile options to simulate Oracle Sales behavior, or Oracle Sales should be personalized to simulate TeleSales behavior.

Table G-1 provides a mapping of the profiles for Oracle TeleSales and Oracle Sales.

Table G-1 Mapping of Oracle TeleSales and Oracle Sales Profile Options

Oracle TeleSales Profile	Oracle Sales Profile
OS: Forecast Sales Credit Type	ASN: Forecast Sales Credit Type
OS: Default Opportunity Win Probability	ASN: Default Opportunity Win Probability
OS: Default Sales Channel	ASN: Default Opportunity Sales Channel
OS: Default Opportunity Status	ASN: Default Opportunity Status
OS: Default Close Date Days	ASN: Default Close Days Date
OSO: Default Forecast Period Type	ASN: Default Forecast Period Type
OSO: Default Forecast Category	ASN: Default Forecast Category
OSO: Forecast Calendar	ASN: Forecast Calendar
OSO: Forecast Calendar Month	ASN: Forecast Calendar Month
OSO: Forecast Pipeline Calculation Basis	ASN: Forecast Defaulting Type
OS: Default Win/Loss Status	ASN: Default Win/Loss Status
OS: Default Status for Leads	ASN: Default Lead Status
OS: Opportunity Access Privilege	ASN: Opportunity Access Privilege
OS: Customer Access Privilege	ASN: Customer Access Privilege
OS: Sales Lead Access Privilege	ASN: Lead Access Privilege
OS: Manager Update Access	ASN: Manager Update Access
OS: Sales Admin Update Access	ASN: Sales Admin Update Access

Setting Corresponding Oracle Field Sales and Oracle Trading Community Architecture

Oracle Field Sales and Oracle Trading Community Architecture each have separate sets of profile options that do not affect the other application. The profile OSO: Default Country maps to the profile HZ: Reference Territory.

Setting Oracle TeleSales and Leads Profile Options

Additionally, some Oracle TeleSales and Leads profile options and lookups must be set to enable interoperation with Oracle Sales. If you do not set these profiles as suggested, you cannot use TeleSales with Oracle Sales.

Table G-2 lists Oracle TeleSales and Leads profiles and their suggested values.

Table G-2 Oracle TeleSales and Leads Profile Options

Profile	Value
OS: Assign New Lead	No
OS: Sales Methodology	Specify a valid value.
OS: Sales Lead Default Close Reason	Converted to Opportunity
OS: Default Opportunity Sales Stage	Specify a valid value.
OS: Lead Link Status	Converted to Opportunity
OS: Lead Incubation Channel	<LEAVE BLANK>
OS: Activate Sales Interoperability	Yes
OS: Lead to Opportunity Move Sales Team	Yes
OS: Opportunity Sales Credit Enforce Sales Team Definition	Yes
OS: Always Add Creator to Customer Sales Team	Yes

Setting Oracle TeleSales and Oracle Sales Lookups

Table G-3 lists the Oracle TeleSales lookups and their corresponding Oracle Sales values.

Table G-3 Oracle TeleSales and Oracle Sales Lookups

Oracle TeleSales Lookup	Oracle Sales Lookup
CLOSE_REASON	ASN: Lead Close Reason
	ASN: Opportunity Close Reason
LEAD_CONTACT_ROLE, Opportunity Contact Rank	ASN: Contact Role Type
VEHICLE_RESPONSE_CODE	ASN: Vehicle Response Code

Personalization Considerations

If integrating Oracle Sales and Oracle TeleSales, you cannot disable the Sales Team table or Remove icon on the Lead Details page, Opportunity Details page, or Customer Details page.

Differences Between Oracle Sales and Oracle TeleSales

Oracle Sales and Oracle TeleSales provide separate Admin screens that enable administrators to set up each product, and there are additional differences between the two applications in the features and functionality available, as well as differences in the required setup for each. The following areas can require additional setup considerations.

- Sales Methodology, page G-5
- Converting Leads to Opportunities, page G-6

- Customer/Contacts, page G-6
- Role and Address in Sales Team, page G-6
- Customer Sales Team, page G-6
- Rolling Forecast, page G-7
- Marketing Campaigns/Offers, page G-7
- Forecast Amounts, page G-7
- Freeze Flag, page G-7
- Close Competitor and Comment, page G-7
- Customer Budget Status, page G-7
- End Customer and Address, page G-7
- Projects and Decision Time Frame, page G-7
- Accepting or Rejecting Leads, page G-8
- Concurrent Updates, page G-8
- Forecasting, page G-8
- Attachments, page G-8
- Incentive Compensation, page G-8
- Field Sales Reports Access, page G-8

Sales Methodology

Oracle Sales enables users to designate whether sales methodologies and stages apply to leads, opportunities, or both, while in TeleSales sales methodologies and stages apply only to opportunities. Therefore, Oracle TeleSales exposes only stages marked as applicable to Opportunities. Existing stages created, including those created through the TeleSales Admin user interface, are treated as applicable to Opportunities only.

Sales Coach

Oracle Sales introduces the use of a sales coach, which helps guide a user through a sales methodology stage. Oracle TeleSales does not use this functionality and continues to use Tasks tied to Sales Stages. Oracle Sales users can view the tasks created in Oracle TeleSales. When creating a sales methodology in Oracle TeleSales, the administrator should ensure that the Create tasks for all stages checkbox is not selected. If this checkbox is selected for a sales methodology whose stages use tasks, and the sales methodology is assigned to an opportunity from Oracle Sales, the tasks are not visible in Oracle TeleSales.

Sales Methodologies and Stages

In Oracle TeleSales, the stage is mandatory and the sales methodology is mandatory. In Oracle Sales, they are conditionally mandatory, and if the stage is specified, then the sales methodology becomes mandatory. If the methodology is specified, the sales stage becomes mandatory, only if there is an applicable sales stage. Therefore, Oracle TeleSales requires that at least one stage within each methodology is set up as applicable to Opportunity.

Converting Leads to Opportunities

Oracle TeleSales enables any lead to be converted to an opportunity, regardless of status, while Oracle Sales enables only leads in open status to be converted. Oracle TeleSales enables multiple leads to be converted to the same opportunity by linking these leads to the opportunity, and also enables opportunities to be linked to one or more leads.

When a lead is converted to an opportunity in Oracle Sales, the status is always Converted To Opportunity. When a lead is converted to an opportunity in Oracle TeleSales, the status and close reason are determined by the profile options OS: Lead Link Status and OS: Sales Lead Default Close Reason. Therefore, when Oracle TeleSales and Oracle Sales are interoperating, these profile options should be set to Converted To Opportunity.

Sales Methodologies and Sales Coaches

If a lead is in a sales stage that is applicable to opportunity, Oracle Sales carries any information entered in the sales coach over to the opportunity. If the lead is converted through Oracle TeleSales, this information is not carried over. If there is no methodology or sales stage designated in the lead, the opportunity in Oracle Sales does not have a methodology or sales stage, whereas Oracle TeleSales uses the methodology and sales stage from the profile options OS: Sales Methodology and OS: Default Opportunity Sales Stage.

Sales Team

In Oracle Sales, the sales team for the lead is carried over to the opportunity, while in Oracle TeleSales, whether or not the sales team is carried over is governed by the profile option OS: Lead to Opportunity Move Sales Team. Therefore, when Oracle Telesales and Oracle Sales are interoperating, this profile option must be set to Yes.

Customer/Contacts

Oracle Sales supports selling to only B2B customers and contacts. B2C customers and contacts can be viewed in Oracle Sales, but the customer and contact links are disabled. Additionally, the contact information is read only. Oracle TeleSales supports selling to both B2B and B2C customers.

Role and Address in Sales Team

In Oracle TeleSales, when assigning a resource to an opportunity sales team, the user can designate a role and address, thereby allowing the user to be assigned to the same sales team multiple times with different role-address combinations. Oracle Sales does not support roles and addresses. The sales team is viewable in Oracle Sales, but the user might not be allowed to update the opportunity until the duplicate sales team assignments are removed.

Customer Sales Team

Oracle Sales automatically adds the logged-in user to the customer sales team. In order for the logged-on user in Oracle TeleSales to be added to the customer sales team, you must set the profile OS: Always Add Creator to Customer Sales Team to Yes.

Rolling Forecast

Oracle Sales does not support the rolling forecast flag. Opportunities created in Oracle Sales do not have the rolling forecast flag set.

Marketing Campaigns/Offers

Oracle TeleSales enables users to specify marketing campaigns and offers at either the header and line levels, while Oracle Sales supports only header-level campaigns (not offers). Additionally, in Oracle TeleSales there is a cross validation that ensures that the offer is associated with the selected campaign. If an opportunity with a header-level offer is accessed in Oracle Sales, and the campaign is changed, the offer might no longer be valid. To correct this problem, the user must update the opportunity in Oracle TeleSales.

Forecast Amounts

Header-level forecast amounts and line-level best, worst, and forecast amounts must be accessed through Oracle Sales, as Oracle TeleSales does not display them.

Freeze Flag

In Oracle TeleSales, a user with update access can freeze an opportunity, so that it cannot be modified, while in Oracle Sales, a user cannot freeze an opportunity.

Close Competitor and Comment

Upon closing an opportunity in Oracle TeleSales, the user can enter a key/close competitor and close comment, while in Oracle Sales, this is not an option. For opportunities created in Oracle Sales, the key/close competitor and close comment fields are empty.

Customer Budget Status

In Oracle TeleSales, a user can specify customer budget status for a lead or opportunity. Oracle Sales does not support this information. These fields are blank for leads and opportunities created in Oracle Sales. Oracle Sales supports the budget amount for leads, but not for opportunities.

End Customer and Address

In Oracle TeleSales, a user can specify an end customer and address. Oracle Sales does not support this data. These fields are blank for opportunities created in Oracle Sales.

Projects and Decision Timeframe

In Oracle TeleSales, a user can associate a project to a lead or opportunity or associate a decision time frame with a lead. As Oracle Sales does not support this data, these fields are blank for leads or opportunities created in Oracle Sales.

Accepting or Rejecting Leads

Oracle TeleSales enables a user to accept or reject leads. This feature is not available in Oracle Sales.

Concurrent Updates

If an Oracle TeleSales user and Oracle Sales user are working on an opportunity at the same time, the application detects the change made by the other person and prevents over writing. This behavior does not apply to leads, which can be overwritten.

Forecasting

When Oracle Sales is installed, the new Oracle Sales forecasting functionality replaces the existing functionality for Oracle TeleSales. Due to the difference in forecasting functionality between the earlier forecasting version and the new Oracle Sales forecasting, previously-saved product worksheets that have not yet been submitted are end-dated when the Oracle Sales patch is applied.

Attachments

In Oracle TeleSales, the user can append attachments to tasks, addresses, notes, and relationships; however, these attachments are not available in Oracle Sales. Attachments for leads, opportunities, customers, and contacts that are added in Oracle Telesales can be accessed in Oracle Sales, since Oracle Sales supports attachments in these areas.

Incentive Compensation

In Oracle Sales, the sales representative and sales manager can access only the commission statement and no other areas of the Oracle Incentive Compensation functionality. In Oracle TeleSales, the telesales agent can access other areas of incentive compensation as well, (for example, Planning, Income Planner, Compensation Plan, and Reports) in addition to the commission statement.

Field Sales Reports Access

Oracle TeleSales supports the access of Field Sales reports; Oracle Sales does not.

Lead and Opportunity Currency

Oracle Sales Supports all valid FND currencies. Oracle TeleSales supports only the currencies defined in the Oracle TeleSales lookup type REPORTING_CURRENCY. When selecting values for the REPORTING_CURRENCY lookup, you should select all FND currencies that you are currently using for Oracle Sales.

H

Customer and Contact Business Activities Plug-Ins

This appendix covers the following topics:

- Business Activities Plug-Ins for Customers and Contacts
- Overview of Business Activities Customization
- Define and Implement View Objects
- Define and Implement an Application Module
- Define the Plug-In Region
- Define and Implement the Controller
- Add a Lookup Code
- Define a FND Function

Business Activities Plug-Ins for Customers and Contacts

Oracle Sales enables consultants to provide customers with plug-ins to provide customized views of business activities for a customer or contact. The customized views must not contain any updateable items or columns. If a region is defined and implemented as described in this appendix, then a plug-in to display a customized business activities can be added.

Business activities are accessible through the Business Activities selection drop down on the Customer and Contact details pages. Applicable activities are listed in the Business Activities selection drop down. By default, these business activities are provided:

- Open Opportunities
- Open Leads
- Proposals Received
- Quotes Received
- Recent Orders and Returns
- Campaigns

Overview of Business Activities Customization

The framework of the business activities table is referred to in these steps as the business activities container. The table itself is referred to as the plug-in region. The content of the table is what you are defining and plugging in.

This is an overview of the steps to create an OA-based Business Activities plug-in:

Steps

1. Define and implement view objects that get the results to display in the plug-in region. Also, define a SPEL property view object, which is used to dynamically render on and off the plug-in region.

2. Define and implement the application module to contain the defined view objects.

3. Define the plug-in region, which contains the results table.

4. Define and implement the controller and associate it with the plug-in region.

5. Add a lookup code to the business activities lookup type.

6. Define a FND function.

Define and Implement View Objects

You must define and implement view object(s) to get the results to display in the plug-In region. Business activities are displayed in both customer and contact details, so the associated view object of the plug-in region must be able to support both areas. The plug-in region's results table is associated with the view object dynamically based on whether the business activities container is displayed in the customer or contact details pages.

Also, you must define a SPEL property view object, which is used to dynamically render on and off the plug-in region.

After defining required view objects, you must associate them to the application module and the plug-in region. The following subsections list the steps to define required view objects.

Customer View Object - SQL Based

To define this view object:

Steps

1. Define the view object business component with SQL statement.

   The SQL statement should have Filter on Customer ID as the bind parameter.

2. Verify that the view attribute mappings are accurate.

3. Generate the view object and view row implementation classes.

4. In the View Implementation class, implement a method to execute the view object query for the given customer ID.

Contact View Object - SQL Based

To define this view object:

Steps

1. Define the view object business component with SQL statement.

The SQL statement should have Filter on the Contact ID and/or the Customer ID as the bind parameter.

2. Verify that the view attribute mappings are accurate.

3. Generate the view object and view row implementation classes.

4. In the View Implementation class, implement a method to execute the view object query for the given customer ID and contact ID.

SPEL Property View Object - Transient

To define this view object:

Steps

1. Define the view object business component with a transient attribute of type Boolean.

    This attribute is used to render on and off the plug-in region.

2. Verify that the view attribute mappings are accurate.

3. Generate the view row implementation class.

Define and Implement an Application Module

A business activities plug-in region must have its own application module. Define an application module and associate it to the plug-in region.

These are the functions of the application module:

Steps

1. Initialize the SPEL properties view object.

2. Initialize the view object query to fetch the results.

3. Reset/Clear the view object associated with the table (results) region.

To implement an application module for a plug-in region:

1. Define an application module business component.

2. Associate the view object business components you have created to the new application module.

3. Generate the application module implementation class. The implementation class must have these characteristics:

    *   Implement a method that sets the Boolean attribute of the SPEL view object to TRUE or FALSE conditionally. Note that this view object must always have one row in it, and the Boolean attribute must be initialized to TRUE or FALSE.

    *   Implement a method that executes the appropriate view object (customer and contact) for a given customer ID and contact ID. Note that the contact ID is available only if the base page is the contact detail page.

    *   Implement a method named *resetQuery()*, that marks the view objects (customer and contact) as not prepared or not ready for execution by invoking the *setPreparedForExecution(false)* method on them.

Define the Plug-In Region

A business activities plug-in region must be defined as a stand alone region with a stack layout. The results table region is included by the stack layout region. It is recommended to prefix the region and item names with the corresponding product code of the plug-in region. The rendered property of the table region must be SPEL bound, so that it can be rendered on and off dynamically.

This plug-in region performs the function of List/Retrieve the data associated with a customer or customer and contact combination when a user selects this region from the business activities selection drop-down menu.

The following subsections describe how to define this plug-in region.

Plug-In Region

To define the plug-in region:

Steps

1. Define a region of the type *stackLayout*.

2. Associate the region to the application module.

3. User the *stackLayout* region, define a region of the type Table.

4. Set the rendered property of the table region using the SPEL syntax. The value is derived at run time from the Boolean attribute of the above defined SPEL view object.

5. Associate each column and item to the appropriate attribute of the view object (customer and contact).

6. Any columns and items of the table that perform a form action (for example, a hyperlink or a button), which enables the user to navigate out of the base page, should always throw a fire action parameter named *ASNReqExitPage* with the value of Y. This parameter is used by the base page to handle actions like implicit save before the user navigates out of the base page.

    Note that the plug-in region is not expected to have any updateable items or columns.

Input Parameters - Plug-in Region

Table H-1 lists the input parameters for the plug-in region.

The parameter type is String for each input parameter.

Table H-1 Input Parameters for the Plug-In Region

Parameter Names	Scope	Description	Required	Possible Values
ASNTxnCustomerID	Transaction	Customer Party ID. Base page populates this parameter and stores it in the transaction.	Yes	Customer Party ID

Parameter Names	Scope	Description	Required	Possible Values
ASNTxnRelPtyID	Transaction	Relationship Party ID. Base page populates this parameter and stores it in the transaction. This value is available only if the base page is the Contact details page.		Relationship Party ID
ASNBusActsPoplist	Page Context	The popup value selected from the business activities selection drop down. The business activities container passes this value to the underlying plug-in regions. The value for this parameter can be obtained from the page context.	Yes	Plug-in region's lookup code
EVENT_PARAM	Page Context	Name of the PPR event raised by the business activities selection drop down menu. The value can be obtained from the page context.		ASNBUSACTS PPR
ASNTxnAddBrdCrmb	Transaction	Base page sets this breadcrumb parameter in the transaction, which will be used during the page navigation from the business activities plug-in region. If no value is passed, then it should be defaulted as ADD_BREAD_CRUMB_YES.		ADD_BREAD_CRUMB_YES ADD_BREAD_CRUMB_NO ADD_BREAD_CRUMB_SAVE
ASNTxnReturnUrl	Transaction	Base page populates this parameter and stores it in the transaction. This can be used by the page navigation from the business activities plug-in region.	Yes	The URL string that is sufficient to navigate back to the base page.

Output Parameters - Plug-in Region

Table H-2 lists the output parameters for the plug-in region.

The parameter type is String for each output parameter.

Table H-2 Input Parameters for the Plug-In Region

Parameter Names	Scope	Description	Required	Possible Values
ASNReqExitPage	Page Content	All component regions that are embedded in (plugged into) the customer and contact business activities container are presumed to be read-only Any columns and items of the table that perform a form action (for example, a hyperlink or a button), which enables the user to navigate out of the base page, should always throw a fire action parameter named *ASNReqExitPage* with the value of Y to indicate that the user is leaving a current page. The base page can use this parameter to handle events like implicit commit before the user navigates out of the base page. .	Optional	Y or N. Default is N.

Define and Implement the Controller

Define a controller and associate it with the defined plug-in region.

These are the functions of the controller:

Steps

1. Associate the table region with the appropriate view object depending on whether the results are to be fetched for customer or contact.

2. Initialize the view object (customer or contact) query.

3. Initialize the SPEL property view object.

Plug-In Region Controller

To define and implement the controller:

Steps

1. Define a controller webui component class

2. In the *processRequest*() of the controller class:

    - Get the customer ID from the transaction parameter *ASNTxnCustomerId*.

    - Get the contact ID from the transaction parameter *ASNTxnRelPtyId*.

    - Get the business activities plug-in selection value from page context parameter *ASNBusActsPoplist*.

    - Set the view usage name of the table region and its child items and columns to an appropriate view usage name. Customer based view object usage name should be used if only customer ID is available. Contact based view object usage name should be used if both contact and customer IDs are available.

    - Based on the business activities plug-in selection value, set the SPEL view row Boolean attribute to either Boolean.TRUE or Boolean.FALSE. This ensures that the plug-in region is rendered only if it is selected from the selection drop down menu.

    - Execute the appropriate view object (customer/contact) query for customer ID or customer ID and contact ID combination.

3. In the process*FormRequest()* of the controller class:

    - Get the customer ID from the transaction parameter *ASNTxnCustomerId*.

    - Get the contact ID from the transaction parameter *ASNTxnRelPtyId.*

    - Get the business activities plug-in selection value from page context parameter *ASNBusActsPoplist.*

    - Get the form action event from page context parameter *OAWebBeanConstants. EVENT_PARAM* .

    - If the form action event is that of business activities plug-in selection drop-down event *ASNBUSACTSPPR*, then:

    - Based on the business activities plug-in selection value, set the SPEL view row Boolean attribute to either Boolean.TRUE or Boolean.FALSE. This ensures that the plug-in region is rendered only if it is selected from the selection drop-down

    - Execute the appropriate view object (customer/contact) query for customer ID or customer ID and contact ID combination

4. Associate this controller to the plug-in region.

Add a Lookup Code

In-order for a new plug-in region to appear in the business activities selection drop down menu, a new look up code must be added to the business activities lookup type. The default lookup type used by the business activities selection drop down is *ASN_BUSINESS_ACTS.*

It is recommended to prefix the new lookup code with the product code.

To add a lookup code:

Steps

1. Add a lookup code to the lookup of type *ASN_BUSINESS_ACTS.*

2. Set the meaning, tag, and enabled flag attributes of the lookup code.

Define a FND Function

To load the plug-in region information at runtime, the business activities container must have access to the plug-in region metadata. Define a new FND function with the same name as that of lookup code and with the Web HTML value as the full package path of the plug-in region.

To define a FND function:

Steps

1. Define a FND function with the same name as that of above defined lookup code

2. Set the Web HTML Call attribute of the function to full mds package path of plug-in region.

   For example, /.../.../.../webui/<plug-in region name>. Note that there should not be any errors raised by the plug-in region controller while handling the exit page navigation events.