Oracle® Sales

User Guide

Release 11 *i*

Part No. B13762-04

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Oracle Sales User Guide, Release 11 *i*

Part No. B13762-04

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Preface

Intended Audience

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

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

- The principles and customary practices of your business area.

- 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*.

How To Use This Guide

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

- Chapter 1, "Introduction to Oracle Sales", provides an overview of Oracle Sales.

- Chapter 2, "Oracle Sales Example Flows", shows representative task flows.

- Chapter 3, "Oracle Sales Quick Reference", presents a quick reference to using the Oracle Sales interface to accomplish your sales tasks.

See Related Documents on page viii for more Oracle Applications product information.

TTY Access to Oracle Support Services

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Accessibility of Code Examples in Documentation

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Structure

1 Introduction to Oracle Sales
2 Oracle Sales Example Flows
3 Oracle Sales Quick Reference

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 Oracle*MetaLink* 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 OracleMetaLink.

- **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.

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 users guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Oracle Marketing User Guide

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

Oracle Proposals User Guide

This guide contains information on using 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 User Guide

This guide contains information on using 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 User Guide

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

Oracle TeleSales User Guide

This guide contains information on using 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 User Guide

This guide contains information on the various Daily Business Intelligence Reports, including Daily Business Intelligence for Sales. Oracle Sales Intelligence User Guide This guide describes the Sales Intelligence reports.

Oracle Inventory User Guide

This guide contains information on using 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 User Guide

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

Oracle Partners User Guide

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

Oracle Incentive Compensation User Guide

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

Oracle Sales Offline User Guide

This guide contains information on using Oracle Sales Offline, a mobile sales application that uses templates to enable sales representatives to manage their sales activities remotely.

Oracle Common Application Components User Guide

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

Oracle Trading Community Architecture User Guide

This guide contains information on using the Oracle Trading Community Architecture.

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 to Oracle Sales

This chapter covers the following topics:

- Overview of Oracle Sales
- What's New
- Oracle Sales Key Features
- Oracle Sales Interface Access and Navigation
- Sales User Searches in Oracle Sales
- Sales Manager Searches in Oracle Sales
- Views in Oracle Sales
- Oracle Sales Dashboard
- Leads Management
- Opportunities Management
- Customer Management
- Contact Management
- Calendar and Task Management
- Notes Management
- Forecasting in Oracle Sales
- Sales Campaigns in Oracle Sales
- Sales Methodologies in Oracle Sales
- Oracle Sales Integrations
- Competitor Tracking in Oracle Sales
- Daily Business Intelligence (DBI) for Sales and Sales Intelligence Reporting
- Personalization in Oracle Sales
- User Preferences for Fields for Leads, Opportunities, and Forecasts
- Security in Oracle Sales
- Data Quality Management in Oracle Sales
- Product Dependencies

Overview of Oracle Sales

Oracle Sales is an enterprise application for sales professionals that simplifies and optimizes the task of planning and managing the sales process. Oracle Sales simplifies the sales process by providing visibility into the sales cycle, helping companies plan and manage effective selling activities. It is integrated in the E-Business Suite and covers key field sales flows from leads to opportunities to quotes. Oracle Sales is integrated with Daily Business Intelligence, Territory Management, Quoting, Inventory, Service Contract, Order Management, Proposals, Partners, Projects, Incentive Compensation, and Marketing. Oracle Sales has been developed using the standard Oracle Self Service Framework. It is optimized for use with wireless.

What's New

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

- Default Sales Dashboard has changed

- Configurable Sales Dashboard

- Sales Funnel stages can display the information for one sales methodology, or for multiple sales methodologies

- Integration with Oracle Partners to provide sales representatives with the capability to determine the external sales team for a lead or opportunity

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

- Integration with Oracle Sales Offline, which enable sales representatives to manage sales efforts remotely

- 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, customer sales team, and opportunity sales team for lead and opportunity creation

- Create an opportunity or a lead from a customer by selecting Create Lead or Create Opportunity from the Action menu

- Change the customer for an opportunity

- View General Classification information for customers

- Display of Budget Amount for leads

- Display of Response Channel for leads and opportunities

- Manager specific search pages for leads and opportunities

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

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

- 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 opportunities)

- Line-level forecasting and contribution

- Addition of the Sales Admin role

- Contact search

- Do Not Call restrictions for contacts who do not wish to receive telemarketing calls

- Lead and opportunity advanced searches and the ability to save a search as a Views

- View commission statements

- 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

Oracle Sales Key Features

Oracle Sales includes the following features:

- **Streamlined creation and management of leads and opportunities:** You can create new leads manually, import leads from Oracle Marketing using the sales campaign tool, or use leads entered by TeleSales agents. Oracle Sales assists in tracking these leads and routing them to the appropriate sales representative, enabling the conversion of leads to opportunities. After conversion, you can update opportunity details and track opportunity progress.

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

- **Competitor tracking:** Within each opportunity, at the product level, you can include competitor information such as name, product, and win/loss status. Additionally, Oracle Sales has defaulting capabilities that match products in the opportunity to potential competitor products.

- **Convenient customer analysis:** Important customer information is integrated into the leads and opportunities pages in Oracle Sales. While working on leads or opportunities, you can view information such as a list of all products that a customer has currently purchased that have service contracts, a list of current and past opportunities, a 12 month service summary, and a list of existing service requests. This provides you with background information on the account as you develop leads and opportunities.

- **360 Degree View in Oracle Sales:** The application offers you a view of:

  - Orders and returns

  - Opportunities

  - Leads

  - Proposals

  - Quotes

  - Campaigns

- **Integrated product information:** Oracle Sales enables you to add product information to leads and opportunities to track the goods or services customers might want to purchase. The products that you can add are defined and categorized in Oracle Inventory.

- **Sales team management:** Sales team data is integrated into the leads, opportunities, and customer pages in Oracle Sales. Sales team members can be added to a lead, opportunity, or customer manually, or by using Territory Manager to build the sales team according to predefined business rules.

- **Customized flexfields:** Salespeople can use global and context-sensitive descriptive flexfields to enter additional information for leads, opportunities, and sales teams. Flexfields are defined by your organization, and enable unique information to be entered, stored, and managed using the Oracle Sales application.

- **Forecasting:** Oracle Sales provides sales organizations with flexibility in managing their forecasts. Sales organizations can analyze their forecast data at opportunity and product levels, enabling management teams to judge the overall health of their organization.

- **Attachments:** Sales representatives can add external documents, web addresses, and text 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.

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

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

- **Sales Offline:** Oracle Sales integrates with Oracle Sales Offline, to enable sales representatives to manage sales efforts remotely.

- **Preference settings:** Preferences for defaults for key values for leads and opportunities.

Oracle Sales Interface Access and Navigation

Accessing Oracle Sales

To Access Oracle Sales, log in to Oracle HTML Applications, using the Sales User or Sales Manager (if you are a sales manager) responsibility. Navigate to Sales User > Sales Dashboard.

Users with the Sales Admin responsibility log in as Sales Manager.

Navigation for Sales Representatives and Sales Managers

Users who log in as sales representatives, with the responsibility of Sales User, access their data in Oracle Sales in a different manner than those who log in as a sales

manager. Sales representatives access the application through the Sales Dashboard page. This page provides a summary of the sales representative's business activities as well as links to other portions of Oracle Sales. For example, if the user wants to see leads data, the user can access the Sales Dashboard and then click the Leads link in the Shortcuts.

Users who log in as sales managers, with the responsibility of Sales Manager, do not access their data through the Sales Dashboard page. They access the application using links on the self service home page, which provide access to Daily Business Intelligence analytic pages as well as specific application pages such as forecasting, customers, leads, and opportunities. For example, if the manager wants to see leads data, the manager could log in with a sales manager responsibility which would display the self service home page. This page has a set of links under the Oracle Sales heading, and the sales manager user would select the leads link to access the leads search page.

Interface Navigation Features

The Oracle Sales interface includes these features:

- **Shortcuts on the Sales Dashboard:** Displays links to the view pages for business objects and tools.

- **Link trail:** As you navigate through Oracle Sales, the links to the pages you have visited are shown at the top of your current page. For example:

  Sales Dashboard > Customers > Customer:BrandNew Industries > Contact: Leslie Moore (BrandNew Industries)

  Use these links to navigate back through the product.

  The use of the browser buttons (for example, Stop and Back) is not supported for navigation in Oracle Sales.

- **Partial page refresh:** This feature enables you to see the changed portion of a page without waiting for the entire page to refresh. For example, if you are viewing a table of leads, you can select a radio button next to a lead and details about that lead are displayed below the table. When you select a different lead, the information shown below the table is refreshed with details on the newly-selected lead.

- **Sortable table columns:** Many table columns are sortable in Oracle Sales. Clicking the column heading sorts the data in ascending or descending order.

- **< Previous** and **Next >**: Links that enable you to view the next available group of items in a table, or to navigate back to the previously listed group of items.

- **Asterisks (*):** Fields with asterisks denote required information.

- **Personalization of tabs:** Some tabs on the update pages can be combined, through personalization, into one Details tab. Flexfields are available on the Additional Information tab.

General Navigation

From the Sales Dashboard, you can navigate to the various types of pages in Oracle Sales. Buttons on the various Sales Dashboard tables include:

- **Personalize:** Enables you to create or duplicate views, or set a view as a default.

  - **Full List:** Enables you to access the View page for lists of customers, leads, and opportunities.

- **Create:** Enables you to create a new task, lead, opportunity, or customer.

Navigation paths to the main pages are:

- Create a business object
  - Sales Dashboard > Business object table > Click **Create (Business object)**
  - Sales Dashboard > Shortcuts > Click **Business object** > Click **Create business object**
- View business object
  - Sales Dashboard > Business object table > Click Full List
  - Sales Dashboard > Shortcuts > Click **Business object**
- Update a business object
  - Sales Dashboard > Business object table > Click **Full List** > Select a business object from the list or search
  - Sales Dashboard > Shortcuts > Click **Business object** > Select a business object from the list or search

Sales User Searches in Oracle Sales

Sales representatives can search for customers, contacts, opportunities, leads, and tasks in Oracle Sales.

Simple and Advanced Searches

For simple and advanced searches, enter your search criteria and click **Go**. Simple searches can have these characteristics:

- Wildcard character percent sign (%) for searches. However, the percent sign cannot be used as the first character in the search string.
- Search on any combination of available fields
- Not case sensitive

For leads and opportunities, click **Save Search** to save the search criteria as a view.

Click **Views** to access the Views page, which enables you to use search criteria to create a view, or to duplicate an existing view, as well as update and delete views. Refer to Views in Oracle Sales, page 1-8 for further information on views. The behavior of views is determined by the security settings for your implementation. See Security in Oracle Sales, page 1-15 for information on security access levels for users. You can use the views provided with Oracle Sales or you can create your own views.

Click **Advanced Search** to access the Advanced Search page.

Advanced searches are supported for customers, contacts, opportunities, and leads. They have the same characteristics as simple searches, but also enable you to add search criteria. To do so, select the field name you want to add to as search criteria and click **Add**.

You can use the same numeric and date fields more than once in an advanced search. For example, you could define an opportunity Close Date field to search for records after May 1, 2004, and a second Close Date field to search for records before June 1, 2004. This search would display records that matched the date range you set up using the two date fields. This logic can also apply to numeric fields.

Searches should not have the same field applied more than once to an advanced search. For example, if you enter IBM as a value in the Customer Name search field, then add a second Customer Name field to the search and enter AT&T as a value, the search returns no results. This occurs because the search looks for records that have both IBM and AT&T as values for the Customer Name search field. A customer would not have two different names, so the search returns a warning message and no records.

Simple and advanced searches for leads and opportunities have a mandatory search field labeled Status Category. The Status Category refers to whether a lead or an opportunity is open or closed. If this field has the value of open selected, then all searches return only those leads or opportunities that have a status that is considered to be an open type of status. If you want to search for closed leads or opportunities, you must select the closed value in this field.

The search does not return any records if you select values in the Status Category field and Status field that cancel each other. For example, if you have the Status Category set to open, and then in the Status field you select a status that is considered to be a closed status, the search returns no results.

Also, you can run a query using both the sales person and sales group search fields in addition to other possible search fields. The results for this query returns records where the sales person you entered is on the sales team and has the sales group you entered as their designated sales group for the lead or opportunity. In this case the two search fields are implicitly linked in the search query.

Simple Searches for Leads and Opportunities

For searches for leads and opportunities, Status Category is a required field. If you can provide a lead or opportunity number, this narrows the search so other search criteria are not required.

Exporting Search Results

Save the results of simple of advanced searches by clicking Export. This saves the table of search results to a file with a .csv extension which can be downloaded and opened in a spreadsheet application.

Sales Manager Searches in Oracle Sales

Users who log in as sales managers can conduct searches that return objects (for example, leads or opportunities) to which they have access as well as objects that their subordinates can access. This includes access to sales groups and their hierarchies as well. This hierarchical search logic can affect system performance, so sales managers have different search pages than those used by sales representatives.

Sales managers access search pages for leads and opportunities from the self service home page rather than from the Sales Dashboard that sales representatives use. Sales managers can also access to customer and contact search pages from the self service home page depending on how Oracle Sales is set up during implementation.

The basic search functionality is similar to that discussed for sales representatives in Sales User Searches in Oracle Sales, page 1-6 with the exceptions discussed in the following subsections.

Sales Manager Searches for Leads

For the Simple Search and Advanced search pages, the sales manager must enter data in both of these mandatory search fields in addition to any other search fields entered:

- Status

- Age (Days)

Additionally, the search field Rank might be mandatory depending on how Oracle Sales was implemented.

Note that these mandatory fields have default values. Be sure to select the value you want to search for before clicking Go.

Also note that the search parameter Status menu list displays only statuses that represent open leads or those that have been converted to opportunities. Thus, as a sales manager, you cannot search for closed leads. This limitation is due to performance issues that can arise when sales managers conduct a search through their hierarchy when there are large numbers of closed leads in the system.

Sales Manager Searches for Opportunities

For the Simple Search and Advanced search pages, the sales manager enter data in both of these mandatory search fields in addition to any other search fields entered:

- Status

- Close Date Quarter

Additionally, the search field Win Probability % might be a mandatory field depending on how Oracle Sales was implemented.

The search field Close Date Quarter is available only to sales managers and is not part of the standard sales representative search. Select values in this field to see which opportunities have a close date in the specified quarter. For example, if you select Q2-05, the search would return opportunities that have a close date in the second quarter of 2005.

Note that these mandatory fields have default values. Be sure to select the value you want to search for before clicking Go.

Views, which are saved searches, are available for leads and opportunities, but not for customers and contacts. The view functionality described in Views in Oracle Sales, page 1-8 applies to sales managers' views with the exception that the sales manager cannot create views on the Sales Dashboard. The behavior of views is determined by the security settings for your implementation. See Security in Oracle Sales, page 1-15 for information on security access levels for managers.

In some cases, users can have roles of both sales representative and sales manager in the system. Users who log in as a sales manager have access only to views they created as a sales manager in the system. They do not have access to views they created when they logged in as a sales user. Also, if they log in as a sales user, they do not have access to views they created as a sales manager.

Views in Oracle Sales

Oracle Sales enables you to save searches for future use. These saved searches, called views, control the display of data in the Leads and Opportunities tables on the Sales Dashboard, and on the Lead and Opportunity Views pages. You can use the views provided with Oracle Sales or you can create your own views.

The behavior of views is determined by the security settings for your implementation. See Security in Oracle Sales, page 1-15 for information on security access levels for users.

Displaying the Search Results of a View

You can display the results of searching with a view by selecting a view name from the view menu and clicking Go.

Views are displayed on both the Sales Dashboard and the Leads and Opportunity Views pages. Views displayed on the Sales Dashboard page are not the same set of views displayed on the Leads or Opportunity Views page. For example, the views displayed in the Leads table on the Sales Dashboard page are separate from those views that are displayed on the Leads Views page.

Creating Views

Views can be created for the Leads and Opportunities bins on the Sales Dashboard, as well as the Leads Views page and Opportunity Views pages. To create a view for the Dashboard page, click **Personalize** to access the Personalize Views page. On this page you can create, edit, or duplicate views by selecting the appropriate button. If you are on the Leads or Opportunities Views pages, you can create a view for the page by clicking Personalize, which displays the Personalize Views page where you have the choice of creating, editing, or duplicating a view. If you are on the lead or opportunity simple or advanced search pages, you can create a view by clicking Save Search. To create a new view, click **Create View**. Click the Update icon to update a view; click the Delete icon to delete a view.

Both the Sales Dashboard and the Leads and Opportunity Views pages have views displayed on the page. You can create views that apply to either the Sales Dashboard or the Views pages, but not to both. For example, if you are on the Dashboard page, and click the Personalize button in either the Lead or Opportunity table to access the Personalize Views page where all views that you create, edit, or duplicate are available only on the Sales Dashboard table.

The same logic applies to the Views pages. For example, if you are on the Leads Views page, and click Personalize, which displays the Personalize Views page where all views that you create, edit, or duplicate are available only on the Leads Views page. If you are on the Leads Simple or Advanced Search pages, clicking Save Search takes you to a page where all views that you create, edit, or duplicate are available only on the Leads Views page.

Creating or modifying existing views is accomplished on the Create View, Update View, or Duplicate View page, as required. The view name you enter on these pages must be unique. Select the Set as default checkbox to designate a view as the default view.

When creating or modifying a view, you can personalize the results table. You can designate which columns are displayed in the table by moving the values between Available Columns and Columns Displayed. You can rearrange the order of displayed columns for a table by moving the values up and down in Columns Displayed. Totaling enables you to access a page where you can type in the new column name as well as designate any columns that should be totaled. You can set up to three sorting orders for the data in the table.

You can add or modify the search parameters used in the view as needed. This is accomplished in the Search Query to Filter Data in your Table section of the page. You can add a new search parameter by selecting the parameter from the Add Another menu and clicking Add.

Other than the numeric and date parameters, do not add the same search parameter more than once to a view. Views that have the same search parameter entered more than once will provide a warning message and do not return any results. This is the

same restriction that applies to advanced searches, as described in Sales User Searches in Oracle Sales, page 1-6.

Managing Views

Views are managed on the Personalize Views page. If you have accessed this page from the Sales Dashboard, it displays a list of the possible views for the Sales Dashboard. If you have accessed the Personalize Views page from the Lead or Opportunity Views page, a list of possible views that can be applied to one of those pages is displayed. The views you have created as well as the views provided with Oracle Sales are displayed on this page.

To update a view, click the Update icon in the table. To duplicate a view, click the radio button in the Select column next to the view name, and click **Duplicate**. You cannot edit or delete a provided view, but can duplicate it and then edit the duplicated version.

You can set one of the views that you have created to be the default by clicking on the Update icon and selecting the Set as Default checkbox on the Update View page. If you do not want to see one of the views you have created displayed in the view menu, select No in the Display View column and click **Apply**.

Oracle Sales Dashboard

The Sales Dashboard provides you with a summary display of your leads, opportunities, and customer interactions, as well as your latest submitted forecast. Your implementation might be personalized to contain fewer areas. See Sales Dashboard, page 3-1 for more information.

Leads Management

Oracle Sales assists in tracking leads, routing them to the appropriate sales representatives, and converting the leads to opportunities. Lead management features include the ability to:

- Create leads in Oracle Sales, or work with leads from Marketing sales campaigns tools, or from TeleSales agents

- Assign leads to sales representatives manually, or assign automatically using the Territory Assignment Program (TAP)

- Rank leads using business-specific logic appropriate to different campaign strategies, regions, or products

- Update leads

- View customer information

- Track contacts related to the lead

- Search on key lead criteria to find the right lead

- Convert qualified leads to opportunities

- Create proposals

- Enter notes for a lead and share them with sales team members

- Track tasks for the lead

See Leads, page 3-4 for more information.

Opportunities Management

Sales teams can use Oracle Sales as a central location to update opportunity details, track the progress of sales efforts, and manage ongoing interactions with the customer. Opportunity management features include the ability to:

- Convert opportunities from a lead or manually create them in Oracle Sales

- Assign opportunities to a sales representative or a sales team dedicated to the opportunity. Assignment can be done manually or automatically using Territory Manager rules.

- Update the opportunities

- Track contacts

- Enter forecast information

- View customer data

- Create proposals or quotes

- Search on key opportunity criteria to find the right opportunity

- Enter notes for an opportunity and share them with sales team members

- Track tasks for the opportunity

See Opportunities, page 3-10 for more information.

Customer Management

Oracle Sales provides you with a detailed view of customer information by integrating information from E-Business Suite modules such as marketing, service contracts, sales, and order management. Customer information that is displayed includes:

- Integrated view of customer information, including marketing campaigns, open leads or opportunities, products under service contract, proposals and quotes received, and recent orders

- Company data such as addresses, company facts, and revenue information

- Notes from the sales representatives working on a customer account

- Tasks that need to be completed for the customer

- Contact repository containing a full list of contacts and addresses for each customer.

- Business relationships with other organizations such as channel partners or subsidiaries

- Customer classifications

- Sales team members associated with each customer

See Customers, page 3-15 for more information.

The customer management functionality of Oracle Sales also has a built-in Data Quality Management (DQM) feature that helps you avoid the creation of duplicate customers. See Data Quality Management in Oracle Sales, page 1-16 for more information.

Contact Management

Oracle Sales provides a contact management system that enables you to enter and track a wide range of data regarding contacts, including:

- Contact information such as primary e-mail, telephone number, address, job title, and department, as well as secondary addresses and phone numbers

- Business activities that are associated with a particular contact. These activities include open leads and opportunities, proposals and quotes received by the contact, and recent orders.

- Suggested contacts for a lead or opportunity based on product interest

- Notes for the contact to track interactions and monitor progress towards goals

- Tasks can be created for a contact and monitored for completion

See Contacts, page 3-17 for more information.

Contacts uses the same Data Quality Management (DQM) feature that is used for Customers. See Data Quality Management in Oracle Sales, page 1-16 for more information.

Calendar and Task Management

Oracle Sales enables you to see scheduled appointments in your work day, and to view other dates to see scheduled meetings. You can access your appointments by using an integrated calendar tool provided by Oracle. This tool enables you to create new appointments, invite other attendees, and synchronize with external calendar applications such as Outlook.

Task management is a feature of leads, opportunities, contacts, and customers. See the *Oracle Common Application Components User's Guide* for more information.

See Tasks and Calendar, page 3-25 for more information.

Notes Management

You can add notes for leads, opportunities, customers, contacts, and forecasts. The name of the note's author and the date that the note was created are also provided, as well as note status. This note history provides the sales team with information on the progress of an effort. Notes have the security levels of publish, private, and public. See the *Oracle Common Application Components User's Guide* for more information on note functionality.

Forecasting in Oracle Sales

Oracle Sales provides sales organizations with flexibility in managing their forecasts. Sales organizations can analyze their forecast data at opportunity and product levels, thereby enabling management teams to judge the overall health of their organization. Opportunity forecasts can be maintained within the opportunity itself. This provides instant visibility to management without the need for users to separately submit forecasts, thereby reducing the time spent by users preparing their forecast. Product family forecasts might be provided to management dependent on, or independent of, the opportunity pipeline.

See Forecasting, page 3-20 for more information.

Sales Campaigns in Oracle Sales

Oracle Sales integrates with Oracle Marketing to provide Sales Campaign functionality to sales managers. This functionality enables sales managers to explore their installed base and historical customer data, and mine the data for cross-sell and up-sell opportunities.

The Oracle Marketing application enables sales as well as marketing users to create activities that cross-sell and up-sell products to customers in particular sales territories. When a sales campaign is launched, leads are generated for sales follow-up. Territory Management assigns the appropriate sales representatives to the leads based on predefined rules. If these leads are converted to opportunities, the same sales representatives are carried over to the new opportunities. Each new opportunity is also linked to the original sales campaign. This enables the marketing and sales organizations to track the progress and success of sales campaign initiatives.

See Sales Campaigns, page 3-18 for more information.

Sales Methodologies in Oracle Sales

Oracle Sales supports custom sales methodologies. Organizations can create sales methodologies that match their requirements for different product lines, sales channels, organization units, or marketing campaigns.

You can access these sales methodologies when you create and manage leads and opportunities. Each stage of the methodology has a sales coach that can consist of a series of questions regarding that sales stage, or provide you with sales stage information. The sales coach assists you by reminding you of points and issues to consider and procedures to follow during the sales effort. Additionally, you can export summaries of the sales coach data into printable worksheets that can be used during review meetings and training sessions.

See Sales Methodologies, page 3-8 for more information.

Oracle Sales Integrations

Oracle Sales integrates with these applications:

- **Oracle Marketing:** Oracle Marketing automates the entire marketing process from campaign planning, budget management, and list creation to execution and analysis.

- **Oracle Quoting:** Oracle Quoting is integrated into the opportunity management functionality in Oracle Sales. If a quote is created from an opportunity, key information concerning the customer, sales team, and products is integrated into the new quote.

- **Oracle Proposals:** Oracle Sales integrates proposals into leads and opportunities to enable you to create proposals and send collateral throughout the sales cycle. If a proposal is created for leads or opportunities that are linked to a sales campaign, the proposal incorporates content and formatting developed specifically for that campaign.

- **Oracle Telesales:** Oracle TeleSales is designed for inbound telesales agents or outbound telemarketing agents. A sales opportunity can begin in TeleSales and then transfer to Oracle Sales. TeleSales agents record lead information from phone calls into the enterprise database, and these are accessible in Oracle Sales for further processing by field sales representatives.

- **Oracle Projects:** Oracle Sales integrates with Oracle Projects to enable the display of projects related to an opportunity.

- **Oracle Partners:** Oracle Sales integrates with Oracle Partners to provide sales representatives with the capability to determine the sales channel for a lead or opportunity.

- **Oracle Incentive Compensation:** Oracle Incentive Compensation provides information on sales commissions, bonuses, and payment adjustments.

- **Sales Offline:** Oracle Sales Offline provides you with the capability to manage sales efforts remotely.

Competitor Tracking in Oracle Sales

Oracle Sales enables you to track competitor efforts within opportunities at the product level, using competitor information from Oracle Marketing. Oracle Sales also provides defaulting capabilities that match products in the opportunity with potential competitors. For example, if an opportunity has two products and you link one product to a particular competitor, Oracle Sales checks to see if the second product is also associated with the same competitor. If true, the second product is linked to the competitor. If required, you can manually overwrite the link. This enables you to track how sales efforts compare to an organization's competitors, and assists in understanding win/loss trends and uncovering competitive threats. Note that competitor information will not be available in Oracle Sales unless it is loaded into Oracle Marketing first.

Daily Business Intelligence (DBI) for Sales and Sales Intelligence Reporting

Oracle Daily Business Intelligence (DBI) for Sales is a management reporting tool that enables sales executives and managers to gain a comprehensive forecast analysis, revenue backlog summary, opportunity activity review, and sales force comparisons for their organizations. Oracle Sales uses DBI information to display top customers, products under contract, and service summary information.

Oracle Sales Intelligence provides senior executives as well as sales and marketing managers with comprehensive, real-time views of the sales cycle that help them assess sales performance. Sales Intelligence enables you to navigate to directly into Oracle Sales.

Personalization in Oracle Sales

Your system administrator can personalize areas in the Oracle Sales user interface. For example, personalization can determine the number of rows displayed in a table (for example, 10 rows or 20 rows), specify product branding (logo or other branding), or whether to hide or show parts of the Sales Dashboard or other pages in Oracle Sales. Some of the functionality described in this guide is not available until your system administrator provides it though personalization.

You can add personalized views of your data. View are saved sets of search criteria. These views control the display of records in the Leads and Opportunities tables on the Sales Dashboard, and on the Lead and Opportunity view pages. You can create personalized views or use the views provided with Oracle Sales. Also the Sales Dashboard is configurable.

See Views in Oracle Sales, page 1-8 for more information.

User Preferences for Fields for Leads, Opportunities, and Forecasts

Oracle Sales enables you to set preferences for the defaults of key fields for leads, opportunities, and forecasts. To do so, click **Preferences** and then, **Sales Default Preferences**, and then click **Apply**. You can personalize the defaults shown Oracle Sales in the areas listed in the table below.

Oracle Sales User Preferences

Area	Fields
Leads	Lead Status
Opportunities	Sales Channel Status Win
	Probability Days Until Close Date
Forecasts	Forecast Category
	Forecast Period Type
	Non-Revenue Type (available through personalization by your system administrator)
	Display Decimal

Security in Oracle Sales

Oracle Sales security has three components for sales representatives:

- 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.

Sales Representative Access

Sales representatives can have full access to data or have Sales Team update access to all leads, opportunities, or customers for which the sales representative is on the Customer, Lead, or Opportunity sales team and where the representative has access. Read-only access to all customers, leads, and opportunities where the representative is on the Customer, Lead, or Opportunity sales team, but update access is not granted.

Manager Access

If you are a sales manager, there are three additional levels of access for customers, leads, and opportunities:

- **Update data:** Update access to all customers, leads, and opportunities where your subordinates are on the Customer, Lead, or Opportunity sales team(s).

- **Inherit data:** Update access to all customers, leads, and opportunities where your subordinates are on the Customer, Lead, or Opportunity sales team(s) with full access granted and read-only access to all customers, leads, or opportunities where your subordinates are on the respective sales team(s) with full access not granted.

- **View data:** Read-only access to all customers, leads, and opportunities where your subordinates are on the Customer, Lead, or Opportunity sales team(s).

Sales Admin Access

An additional access level (role), Sales Admin, 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. This person can act for the sales manager when necessary. The Sales Admin should have an access level lower than the sales manager.

The Sales Admin has view only access to a manager's forecast details unless create, update, and submit forecast capabilities are enabled by the system administrator. Note that even with the forecast capabilities enabled, the Sales Admin might not be able to edit the sales manager's owned opportunities on the Forecast page depending on system settings.

If you are a Sales Admin, there are three additional levels of access for customers, leads, and opportunities:

- **Update data:** Update access to all customers, leads, and opportunities where your subordinates are on the Customer, Lead, or Opportunity sales team(s).

- **Inherit data:** Update access to all customers, leads, and opportunities where your subordinates are on the Customer, Lead, or Opportunity sales team(s) with full access granted and read-only access to all customers, leads, or opportunities where your subordinates are on the respective sales team(s) with full access not granted.

- **View data:** Read-only access to all customers, leads, and opportunities where your subordinates are on the Customer, Lead, or Opportunity sales team(s).

Data Quality Management in Oracle Sales

When a you create a new customer or contact, Oracle Sales checks to see if there is an existing customer or contact that has similar characteristics (such as name, city, state, country) to the new customer or contact. If the validation indicates that the new item might be a duplicate, the Data Quality Management feature displays a warning that lists the existing customers or contacts that closely match the new item. You can choose to use one of the items in the list, or continue with the creation of a new customer or contact.

You can check for the existence of duplicate customer entries in the application by displaying the list of possible duplicates.

Product Dependencies

Oracle Sales is dependent on these applications for:

- **Daily Business Intelligence (DBI):** Top opportunities, top customers, products under contract, and service summary information

- **Calendars and Tasks:** Calendar and task sections of the Sales Dashboard and imbedded task functionality across the sales application suite

- **Oracle Marketing:** Marketing campaign data that might be the source of leads and opportunities, sales campaign data, and competitor information

- **Oracle Service Contracts:** Contract details for service items from Oracle Service Contracts

- **Oracle Inventory:** Product information selected on leads and opportunities

- **Oracle Quoting:** Quotes functionality, and also the sales supplements for sales coaches

- **Oracle Proposals:** Proposal functionality

- **Oracle Partners:** Sales channel (external sales team) for a lead, opportunity or customer

- **Oracle Projects:** Projects functionality

- **Oracle Incentive Compensation:** Data for sales commission statements

- **Oracle Applications Framework:** Provides the framework and user interface for Oracle Sales; enables personalization of the Oracle Sales user interface, and Views functionality.

- **Oracle Territory Manager:** Sales representative assignment rules

- **Oracle Trading Community Architecture (TCA):** Customer and contact information, including searches

- **Notes:** For notes functionality throughout Oracle Sales

- **Intellisync by PumaTech:** Desktop tool that synchronizes the Oracle Sales calendar with external calendar applications, such as Outlook

2

Oracle Sales Example Flows

This chapter covers the following topics:

- Examples of Task Flows in Oracle Sales
- Create and Rank a Lead
- Convert a Lead to an Opportunity
- Update an Opportunity
- Create a Quote from an Opportunity
- Create a Sales Forecast
- Execute a Campaign Schedule
- Create a Customer - Duplicate Warning

Examples of Task Flows in Oracle Sales

These flows depict examples of tasks you can perform in Oracle Sales. The flows are not meant to show each task you can perform in the application, but to give you an idea of how to optimize the functionality in Oracle Sales.

Create and Rank a Lead

Leads enable you to capture your contact with a potential customer and gather information to determine the interest level of that customer. When there appears to be sufficient customer interest, the lead can be converted to an opportunity.

The figure below shows the steps for the creation of a lead. The steps you follow might vary from this flow. See Leads, page 3-4 for more information.
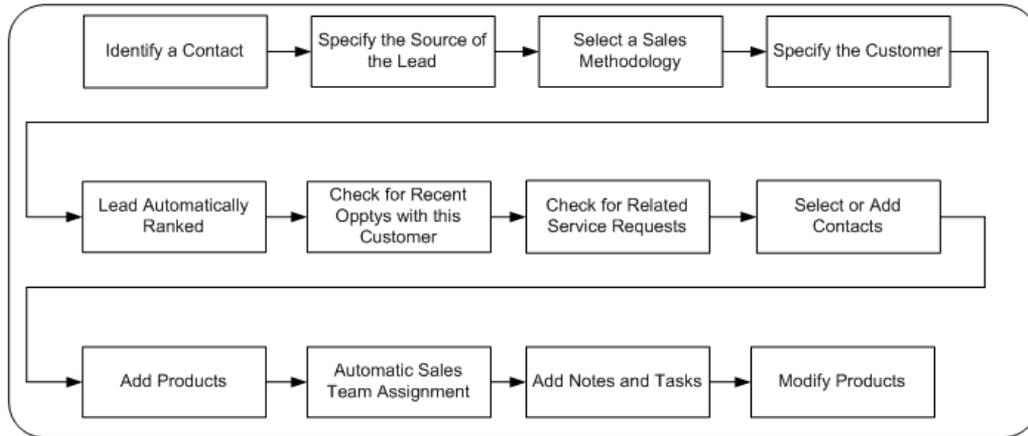
Convert a Lead to an Opportunity

You can convert qualified leads to opportunities. The figure below shows the steps to convert a lead to an opportunity. See Opportunities, page 3-10 for more information.
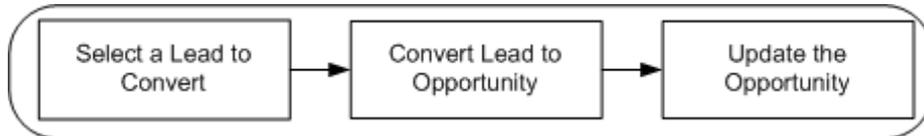
Update an Opportunity

You can update existing opportunities that you own (or to which you have update access), adding notes, tasks, contacts, forecasting, or additional products. Once you update an opportunity, you can create a proposal based on the opportunity to send to the customer.

The figure below shows the steps for updating an opportunity. The steps you follow might vary from this flow. See Opportunities, page 3-10 for more information.
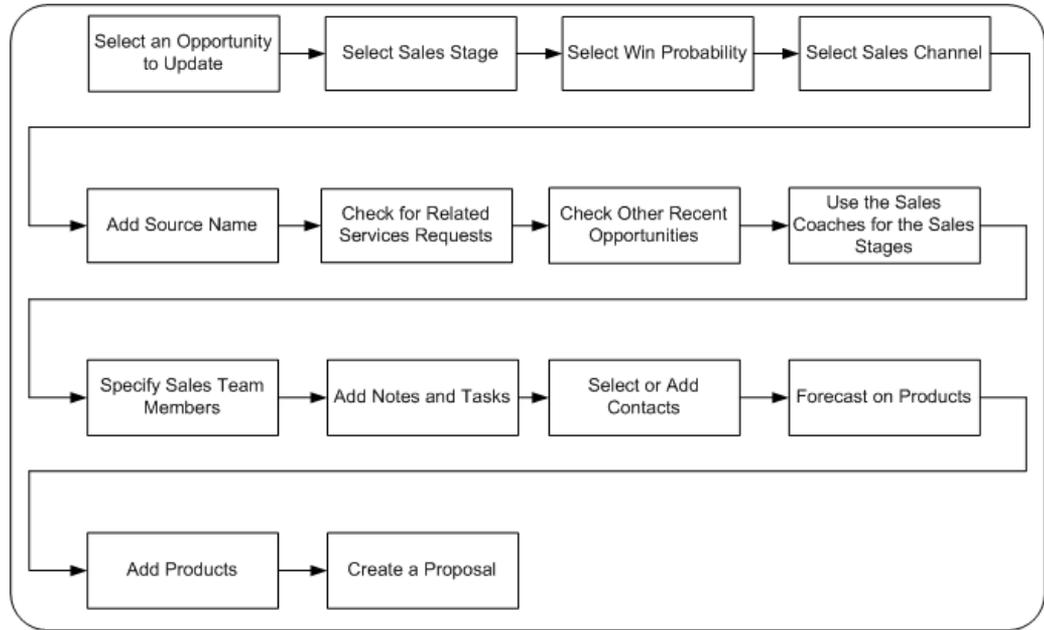
Create a Quote from an Opportunity

You can create quotes from opportunities in Oracle Sales. Oracle Sales uses the functionality of Oracle Quoting. See the *Oracle Quoting User Guide* guide for more information.

The figure below shows the steps to create a quote from an opportunity. The steps you follow might vary from this flow. See Quotes, page 3-26 for more information.
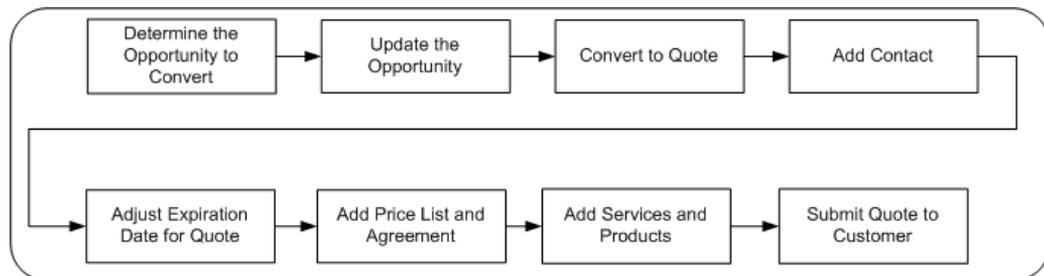
Create a Sales Forecast

Sales forecasting enables the reporting of projected sales up the management hierarchy, for sales representatives and sales managers. The goal of forecasting is to determine projected sales, the potential value of those sales, and finally potential sales revenue.

The figure below shows the steps for the creation of a sales forecast. The steps you follow might vary from this flow. See Forecasting, page 3-20 for more information.
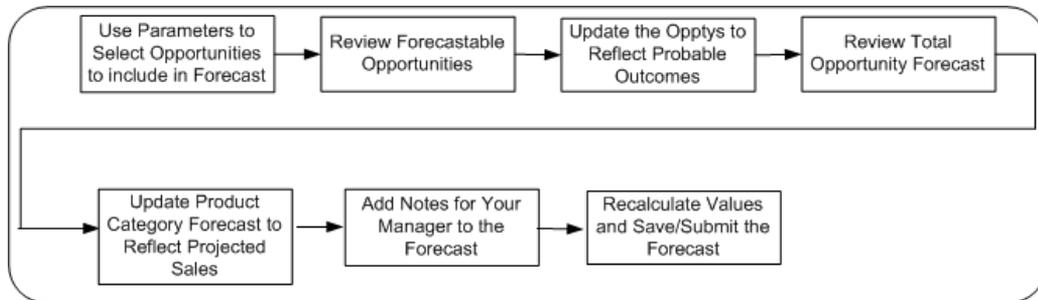
Execute a Campaign Schedule

Oracle Sales enables you to execute existing campaigns that have been previously created in Oracle Marketing by creating a campaign schedule, setting a launch date, and then actually implementing the campaign.

The figure below shows the steps for the execution of a typical campaign. The steps you follow might vary from this flow. See Sales Campaigns, page 3-18 for more information.
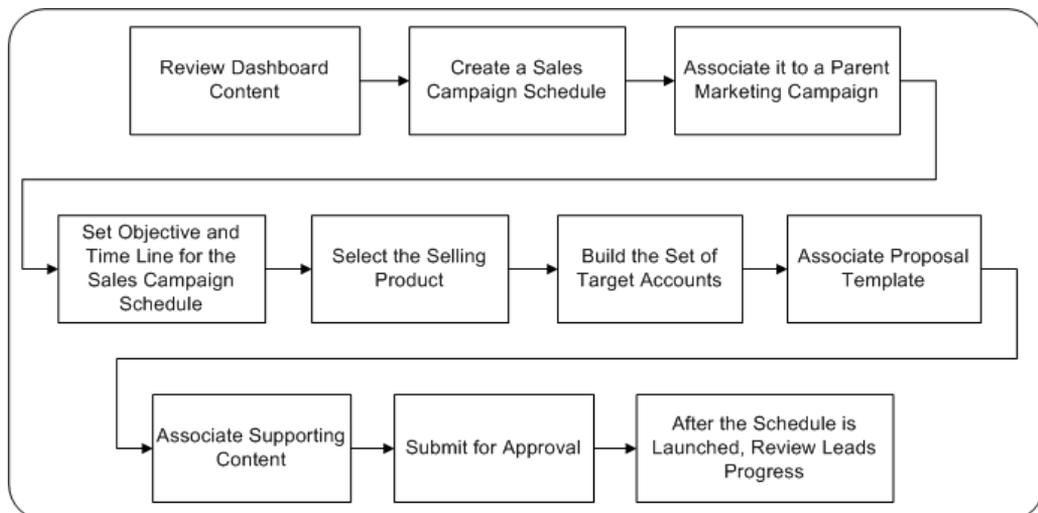
Create a Customer - Duplicate Warning

When a you create a customer, Oracle Sales checks to see if there is an existing customer that has similar characteristics (such as name, city, state, country) to the new customer. If the validation indicates that the new item might be a duplicate, the data quality management feature displays a warning that lists the existing customers that closely match. You can choose to use one of the customers in the list, or continue with the creation of a new customer. The figure below shows the flow of customer creation with this warning.
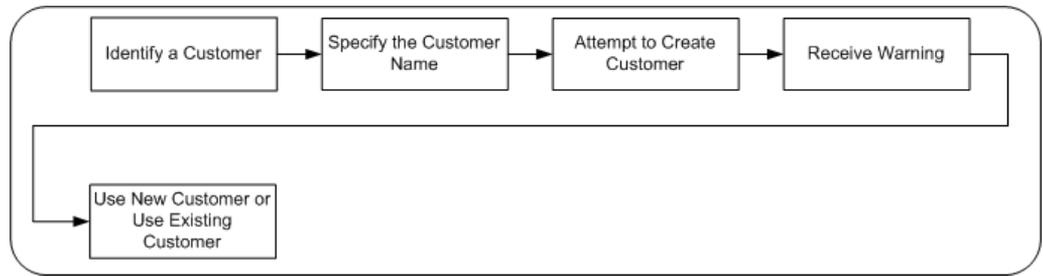
This data quality warning also occurs if you attempt to create a contact that shares characteristics with an existing contact.

3

Oracle Sales Quick Reference

This chapter covers the following topics:

- Using Oracle Sales
- Sales Dashboard
- Leads
- Sales Methodologies
- Opportunities
- Customers
- Contacts
- Sales Campaigns
- Forecasting
- Tasks
- Calendar
- Quotes
- Proposals
- Sales Commission Statements

Using Oracle Sales

This chapter assists you in using Oracle Sales. It does not describe every field and value, assuming that many things are obvious to you as a sales professional. Rather, it seeks to define certain terms, give context for events, and help you locate the Oracle Sales functionality you need to get your job done.

Oracle Sales can be personalized by your administrator, so the functionality and navigation available to you in Oracle Sales might differ from what is described in this chapter.

Sales Dashboard

The Sales Dashboard provides you with access to varied sales data from a single location. Rather than access the various areas of Oracle Sales individually, you can view summarized data on one page and see an overview of your current sales efforts. This

summarized view enables you to look for issues in your business information and to use links to access detailed information.

The Sales Dashboard displays these information areas:

- Sales Funnel, page 3-2
- Shortcuts, page 3-2
- Latest Submitted Forecast, page 3-2
- Calendar & Tasks, page 3-2
- Leads, page 3-3
- Opportunities, page 3-3
- Top Customers (available through personalization), page 3-3
- Leads by Age, page 3-4
- Cross-Sell/Up-Sell Campaigns, page 3-4
- Top Opportunities (available through personalization), page 3-4

Sales Funnel

The Sales Funnel enables you to view a summary of the open opportunities in the pipeline. Each section of the funnel graphic can represent a separate sales opportunity stage or multiple stages. Click a funnel section to view all current open opportunities that can be forecasted in that stage or group of stages in the sales cycle.

Move your mouse over the text in the funnel graphic to see the total pipeline amount for the opportunities in that stage or group of stages. The amount is displayed in your default currency. To see the total for all of the opportunities you have in the pipeline, move your mouse over the open end of the funnel in the graphic. These are the actual amounts (not the forecast amounts) for your opportunities.

Shortcuts

The Shortcuts are a list of links to sales tools and pages in Oracle Sales.

Latest Submitted Forecast

The Latest Submitted Forecast displays a summary of your most recently submitted forecast data, based on your forecast parameter settings (sales group, period type, and category). This summary includes Best Case, Forecast amount, and Worst Case.

Calendar & Tasks

The Sales Dashboard displays your daily appointments and tasks. The calendar you see may vary according to settings. You can view appointments for a specific day by entering that date, or click the calendar icon to use the calendar tool to select a date. To view today's appointments, click **Today**.

Your tasks are listed in a separate table. Sort the listed tasks by clicking the column headings. You can view task details by clicking the task name, or update a task by clicking the Update icon. Access details on appointments and tasks selecting the appropriate link.

You can synchronize your appointments and tasks with Microsoft Outlook by using Pumatech's Intellisync, a desktop application that synchronizes the calendar with external calendar applications.

Leads

The Leads table lists your leads. Click the lead names to access an individual lead to view details or update the lead; click the contact or customer names to access details or update the contact or customer information. Sort the listed leads by clicking the column headings.

You can choose to use a view to filter the display leads in the Leads table. Select a view from the menu and click **Go**. Click **Personalize** to access the Personalize Views page to duplicate, create, update, or delete a view, as well as change your default view. Views provided with Oracle Sales cannot be updated or deleted.

Click **Full List** to display the Lead Views page. The views you see on the Leads Views page are not the same views that are in the Leads table on the Sales Dashboard. If you want the default view on the Sales Dashboard to be the same as the default view on the Lead Views page, you can create identical default views for both pages. See Views in Oracle Sales, page 1-8 for more information on views.

Click **Convert to Opportunity** to convert a lead to an opportunity.

Click **Export** to download the list of leads to a file with a .csv extension that you can use in a spreadsheet application. The Export button can be added through personalization performed by your system administrator.

Opportunities

The Opportunities table lists your opportunities. Click the opportunity names to access an individual opportunity to view details or update the opportunity; click the customer names to access a customer to view details or update customer information. Sort the listed opportunities by clicking the column headings.

You can choose to use a view to filter the display opportunities in the Opportunities table. Select a view from the menu and click **Go**. Click **Personalize** to access the Personalize Views page to duplicate, create, update, or delete a view, as well as change your default view. Views provided with Oracle Sales cannot be updated or deleted. Views that you create on the Sales Dashboard work only with the Opportunities table on the Sales Dashboard.

Click **Full List** to display the Opportunity Views page. The views you see on the Opportunities Views page are not the same views that are in the Opportunities table on the Sales Dashboard. If you want the default view on the Sales Dashboard to be the same as the default view on the Opportunity Views page, you can create identical default views for both pages. See Views in Oracle Sales, page 1-8 for more information on views.

Click **Export** to download the list of opportunities to a file with a .csv extension that you can use in a spreadsheet application. The Export button can be added through personalization performed by your system administrator.

Top Customers

The Top Customers table is available through personalization by your system administrator and lists your top ten customers based on highest total order amount. The table displays the customer name, the customer's industry, the total amount of active service contracts, the total amount of orders (excluding service contracts), and the number of open opportunities. Use links to access detailed customer or opportunity information. Sort the listed customers by clicking the column headings.

Click **Full List** to display the Customers simple search page which lists customers and enables you to perform searches.

Leads by Age

The Leads by Age table lists your leads by rank and divides them into age groups. The table also shows closed leads, converted leads, and the conversion percentage.

This table enables you to find the older leads that might need immediate attention. Select the lead number links to view groups of leads. For example, if there are 25 leads with the rank of Hot Lead in the Open <=2 Days column, click the number 25 to display a list of those 25 leads with that rank and age.

Click **Full List** to display the Leads View page.

Note that this table may not display all of your leads that are currently in the system. For optimum performance when displaying the Sales Dashboard, it is recommended to limit how far in the past Oracle Sales must go when calculating the number of older leads. During system setup, your system administrator can define how far back in time these calculations should be made. Check with your manager or system administrator to determine the maximum age of leads that are displayed in this table.

Cross-Sell/Up-Sell Sales Campaigns

This table displays a summary of your leads and opportunities generated from cross-sell/up-sell sales campaigns. The name of the sales campaign links to the Sales Campaign Details page. The leads generated by each campaign are broken out by status, including no action, in progress, and dead leads. The percentage of leads converted to opportunities is also displayed.

Opportunities that have been converted from the leads are displayed by status, including in progress, lost, and won. A won percentage number is also displayed.

Select the numeric links in the table to view groups of leads or opportunities. For example, if there are 10 leads in the In Progress column, click the number 10 to display a list of those 10 leads with that status.

Note that this table may not display all of your sales campaigns that are currently in the system. For optimum performance when displaying the Sales Dashboard, it is recommended to limit the number of sales campaigns that are displayed in this table based on the age of the campaign. During system setup, your system administrator can define the age of sales campaigns that are displayed. Check with your manager or system administrator to determine the maximum age of sales campaigns that are displayed in this table.

Top Opportunities

This table is available through personalization performed by your system administrator. The Top Opportunities table lists your ten opportunities that have the highest total forecast amounts, providing a convenient view of your most promising revenue prospects. Click on the opportunity names to access an individual opportunity to view details or update the opportunity; click on the customer names to access a customer to view details or update the customer's information. Sort the listed opportunities by clicking the column headings.

Leads

Leads are potential sales prospects, that can eventually be converted into opportunities. Leads can be generated from several sources:

- **Marketing:** Based on marketing campaigns and trade shows, leads may be generated

- **TeleSales:** TeleSales agents record lead information from phone calls
- **Oracle Sales:** Sales representatives enter lead information from the field directly into Oracle Sales

After a lead is generated, it is ranked and assigned to a sales representative. After key information is gathered, a lead is qualified automatically depending on your settings.

You can view history information for your leads. This history enables you to track activity for a lead when it is initially created and each time it is updated. This history enables you to understand the progression of a lead and make appropriate decisions based on this history.

This section contains:

- Viewing, Creating, and Updating a Lead, page 3-5
- Creating an Opportunity from a Lead, page 3-7
- Viewing Lead History, page 3-8

Viewing, Creating, and Updating a Lead

View Leads

The Lead Views page displays views that you can select to display your data. This page enables you to review and update a specific group of leads. If you want to see a summary of a particular lead, click the radio button in the Select column next to the lead name. This refreshes the page with the selected lead's summary details. These summary details can be updated if needed, or if you require more detailed information on the lead, click the lead name to display the Update Lead page.

Click **Simple Search** to access the simple search page.

If you want to see a different view, select the view name from the View menu and click **Go**. Click **Personalize** to access the Personalize Views page to duplicate, create, update, or delete a view, as well as change your default view. See Views in Oracle Sales, page 1-8 for more information on views.

Click **Export** to download the list of leads to a file with a .csv extension that you can use in a spreadsheet application.

Enter Information on the Create Lead and Update Lead Pages

When you have finished creating a new lead, click **Apply**. When you have finished working with the Update Lead page, click **Save**.

Notes
- **Methodology:** Captures your lead qualification process. Follow these steps to qualify a lead. See Sales Methodologies, page 3-8 for more information.
- **Status:** The status of the lead; for example New, In Progress, or Inactive. The status interacts with the Close Reason field.
- **Close Reason:** The reason a lead was closed; for example No Interest, Price, or Wrong Territory. You cannot specify a close reason without a status that is closed, such as Inactive.
- **Rank:** A subjective assessment that you make about the quality of the lead, or an automatic rank assignment.

- **Sales Channel:** The sales channel assigned to the lead. For example, Alumni Visit, Commercial, Direct, or Email.

- **Source:** Name of the marketing activity that generated the lead. For example, a sales campaign.

- **Budget Amount:** The amount that a customer might be able to spend on the product or service detailed in the lead. This field is available though personalization performed by your system administrator.

- **Response Channel:** The method by which the lead was acquired. This field is available though personalization performed by your system administrator.

- **Address:** Customer address for the lead. After you create a lead, the address defaults to the primary address for the customer. However, you can select another address for the lead that is not the primary address.

- **Stage:** The sales stages. These stages are determined by the sales methodology selected.

Customer Analysis Tab

This tab contains:

- **Products Under Contract:** Displays the product category of products for which your customers have service contracts. The product category name can be expanded to list the nested levels of product categories and items. The amount shown is the value of the service for products in that category that are under the service contract. The amounts roll up to the first level of the product hierarchy.

  Recent Opportunities: Displays the previous opportunities for the customer, showing the name of the opportunity, the close date, the current status, the owner, and the owner's telephone number. You can navigate to the next group of opportunities, or view previously displayed opportunities. Available through personalization.

- **Service Summary:** Displays the total number of open service requests, the number of escalations, and the average days to close services requests that have the severity levels of High, Medium, or Low. Available through personalization.

- **Service Request Backlog:** Displays a brief description of the customer's problem, severity level, whether the problem was escalated, the number of days the issue has been open. You can navigate to the next group of service requests, or view previously displayed service requests.

Notes and Tasks Tab

See the Notes and Tasks Tab, page 3-24 for details.

Contacts Tab

This tab contains:

- **Suggested Contacts:** Displays contacts that are suggested by Oracle Sales as likely contacts for this lead, based on previous opportunities with the same product categories and customers. Click the Add to Selected Contacts icon to add a suggested contact to Selected Contacts for the lead.

- **Selected Contacts:** Displays the contacts for this lead, including the contact name, job title, phone, and e-mail, and their role in their organization relative to

this lead. Select the Primary checkbox if this contact is the primary contact for the lead. Click the Remove icon to delete the contact from the Selected Contacts list.

Products Tab

Displays the products associated with the lead, including unit of measure for items, product quantity, and the amount for the product. Click the Remove icon to delete the product from this list. Select a product to view product details.

Sales Cycle Tab

This tab is available if there is a sales methodology associated with the lead.

Displays the sales stages. These are the stages of your organization's defined Sales Methodologies. They can include stages like: Stage 1: Qualify, Stage 2: Assess, Stage 3: Propose, and Stage 4: Close.

The stages have defined steps; these are listed for each stage displayed. You can choose to view All Stages, or the Current Stage. Each stage has an overall Sales Coach, and each step has it's own specific Sales Coach. Click the Sales Coach icon to access. Sales Coaches are lists of questions related to each step of the sales stage.

Select the Completed checkbox as you complete each step.

Click **View Worksheet** to display the Sales Coaching worksheet for the selected stage or step in a text editor. See Sales Methodologies, page 3-8 for more information.

Sales Team Tab

This tab contains:

- **Sales Team:** A sales team is a group of salespeople assigned to the lead. You can modify leads you own, and your fellow sales team members can view or modify the lead if they have access.

  The Full Access checkbox determines whether the team member can update or only view the lead. The default is selected.

  The Do Not Reassign checkbox determines whether the sales team member can be reassigned by TAP. The default is unselected.

  The Owner checkbox determines which sales team member owns the lead. There can be only one owner for each lead.

- **Partners:** A partner is an indirect sales channel selected (either automatically or manually) to pursue a lead. For example, partners can be value-added distributors (VADs) or value-added resellers (VARs). The partners table is not available unless it has been provided by your system administrator through personalization.

Proposals Tab

Displays the proposals that have been created for this lead, including the proposal name, a brief description, the proposal owner, the due date, and the status.

Oracle Sales uses the functionality of Oracle Proposals. See the *Oracle Proposals User Guide* guide for more information.

Creating an Opportunity from a Lead

You can convert only open leads into opportunities.

Click the Convert to Opportunity Button or Icon

The Update Opportunity page is displayed, containing the information carried over from the original lead. This information includes:

- Lead name (which becomes the Opportunity Name)
- Customer Name
- Sales Methodology
- Address
- Sales Coach
- Attachments
- Sales Stage
- Currency
- Sales Channel
- Source Name
- Contact information
- Product information
- Sales Team information
- Notes

Your lead's status is changed to Converted to Opportunity.

Viewing Lead History

To access history, click **View History** on the Update Lead page.

View Information on the Lead History Page

You can view the history of a lead (specifically changes to the lead header) as it flows through the sales cycle. This helps you make decisions about further action with the lead.

Notes

- **Updated Date From/To:** Enables you to search for and view lead history that occurs between specific dates.
- **Updated By:** Source for the update. Records displayed can be filtered by this source name.
- **Field:** Name of the field that has changed. You can filter the records displayed by selecting the field name of the changed field you want to display.
- **Old Value:** Value for the changed field before it was changed.
- **New Value:** Current value for the changed field.

Sales Methodologies

Sales Methodologies capture your organization's sale cycle guidelines for leads (for lead qualification) and opportunities. Sales methodologies and their associated Sales Coaches are created by business analysts in your organization.

You can select a sales methodology when you create a lead or an opportunity. The methodology can apply to the lead only, the opportunity only, or a lead and its resulting opportunity. When you convert a lead to an opportunity, the sales methodology carries over to the opportunity.

In Oracle Sales, sale methodologies consist of sales stages. For example, a methodology called Strategic Sales might have sales stages called:

- Stage 1: Initial Assessment

- Stage 2: Identify Business Drivers

- Stage 3: Propose Value Proposition

- Stage 4: Agreement and Close Deal

These stages can apply to a lead or an opportunity, or to both. In our example Stage 1: Initial Assessment might be accessible only from a lead. The rest of the sales methodology could then apply to the ensuing opportunity.

Within these stages are defined steps. These steps can contain tips, questions, or instructions. Stage 1: Initial Assessment might have steps like these depending on the setup of the methodology:

- Identify Industry Issues/Trends/Standards

- Determine Entry Strategy

- Initiate Contact and Appointment

- Assess High Level Business Needs

- Make Go/No Go Decision

Each step has a set of questions associated with it, known as a Sale Coach. These questions are designed to help you work your way through the various stages of the methodology. They can be in the form of worksheets that you fill in as you advance through the stages of the sales cycle, or consist of instructional information. For example, the step Identify Industry Issues/Trends/Standards (the first step in our example Stage 1) might have questions like these associated with it:

- What industry is the prospect in?

- What are the key issues facing this industry?

- What standards exist or are emerging in the industry?

- Where do they stand in this industry?

You can create a lead or an opportunity without a methodology. If you create a lead or an opportunity without using a sales methodology, you can add one when you update the lead or opportunity. However, once you save a lead or opportunity with a selected sales methodology, the methodology is displayed as read-only text and cannot be modified.

Using a Sales Methodology

Select a Sales Methodology

When creating a lead or an opportunity, select a sales methodology. When you click **Apply**, the methodology you selected for the lead or opportunity is displayed in the Update Lead or Update Opportunity page.

Access the Sales Methodology

Click **Sales Cycle** to access the Sales Coaches in the stages of the methodology.

You can select the various stages and underlying steps and click **View Worksheet** to view a printable version of the Sales Coaches. Use this as a worksheet to help you get started on your customer research before you enter the data into the online Sales Coaches. Once the Sales Coaches are complete, you can click **View Worksheet** to access this information.

Enter Data into Sales Coaches

To enter information into the Sales Coaches, click the Sales Coach icon for the desired stage (to access Sales Coaches for all of the steps) or step (to access the Sales Coach for that step only).

You can enter data into the Sales Coaches for the various stages and steps in the methodology prior to the lead or opportunity actually being in that stage. This enables you to capture information that is applicable to later stages of the lead or opportunity as soon as possible.

Indicate When a Step or Stage is Complete

When you have completed the Sales Coach for a step or stage in a sales methodology, you can mark it as Complete by selecting the associated Completed checkbox. The stages in the Sales Coach and the actual stages of the lead or opportunity are not synchronized with each other. As a result, you can mark the stages and steps as complete regardless of the actual status of the stages of the lead or opportunity.

Opportunities

Opportunities are defined as pending sales that can be forecasted. Once an opportunity is identified, a sales representative or sales manager guides the opportunity through the sales process. An opportunity can be converted from a lead, or created as a new opportunity.

You can view history information for your opportunities, which enables you to track activity for an opportunity when it is initially created and each time it is updated, and includes product and non-revenue information. History enables you to understand the progression of an opportunity and make appropriate decisions based on this history. Opportunity history creation is enabled by your system administrator through personalization.

This section contains:

- Viewing, Creating, and Updating an Opportunity, page 3-10
- Creating a Quote from an Opportunity, page 3-14
- Closing an Opportunity, page 3-14
- Viewing Opportunity History, page 3-14

Viewing, Creating, and Updating an Opportunity

View Opportunities

The Opportunity Views page displays views that you can select to display your data. This page enables you to review and update a specific group of opportunities. If you want to see a summary of a particular opportunity, click the radio button in the Select column next to the opportunity name. This refreshes the page with the selected opportunity's summary details. These summary details can be updated if needed, or

if you require more detailed information on the opportunity click the opportunity to display the Update Opportunity page.

Click **Simple Search** to access the simple search page.

If you want to see a different view, select the view name from the View menu and click **Go**. Click **Personalize** to access the Personalize Views page to duplicate, create, update, or delete a view, as well as change your default view.

Click **Export** to download the list of opportunities to a file with a .csv extension that you can use in a spreadsheet application.

Enter Information on the Create Opportunity and Update Opportunity Pages

When you have finished creating a new opportunity, click **Apply**. When you have finished working with the Update Opportunity page, click **Save**.

Notes

- **Methodology:** Captures your sales group's best practices. These steps assist you in making sales.

- **Stage:** The stage in the sales methodology for the opportunity. Stages are related to the win probability values.

- **Win Probability:** The chance of winning the opportunity expressed as a percentage. Win probabilities are used to calculate weighted pipeline amounts (opportunity amount multiplied by win probability). Lower numbers imply opportunities with a lesser chance of closing; higher numbers imply a greater chance of closing the opportunity with a win.

- **Sales Channel:** The sales channel assigned to the opportunity. For example, Direct, Reseller, Other.

- **Response Channel:** The source for the opportunity, such as Fax or Email.

- **Source:** Marketing source name that generated the opportunity. For example, a direct mail campaign.

- **Referral:** Link to the Referral Details page. Appears only if the opportunity has a related referral, and is enabled through personalization.

- **Customer:** Click **Select** to change the customer for the opportunity.

- **Address:** Customer address for the opportunity. After you create a opportunity, the address defaults to the primary address for the customer. However, you can select another address for the opportunity that is not the primary address.

- **Status:** The status of the opportunity; for example Preliminary, On-Hold, or Won. The status interacts with the Close Reason field.

- **Close Reason:** The reason an opportunity was closed; for example Won Opportunity. You cannot specify a close reason without a status that is closed, such as Inactive.

- **Amount:** The total opportunity amount.

- **Forecast Amount:** The forecast amount, which is distributed to the individual product forecast based on proportion. For example:

  Existing Opportunity Forecast: 100

  Existing Product Forecast Line 1: 20

Existing Product Forecast Line 2: 80

If you change the opportunity forecast amount to 200, the result is:

New Opportunity Forecast: 200

New Product Forecast Line 1: 40

New Product Forecast Line 2: 160

Customer Analysis Tab

This tab contains:

- **Products Under Contract:** Displays the product category of products for which your customers have service contracts. The product category name can be expanded to list the nested levels of product categories and items. The amount shown is the value of the service for products in that category that are under the service contract. The amounts roll up to the first level of the product hierarchy.

- **Recent Opportunities:** Displays the previous opportunities for the customer. You can navigate to the next group of opportunities, or view previously displayed opportunities.

- **Service Summary:** Displays the total number of open service requests, the number of escalations, and the average days to close services requests that have the severity levels of High, Medium, or Low.

- **Service Request Backlog:** Displays a brief description of the customer's problem, severity level, whether the problem was escalated, the number of days the issue has been open. You can navigate to the next group of service requests, or view previously displayed service requests.

Notes and Tasks Tab

See Notes and Tasks Tab, page 3-24for details.

Contacts Tab

This tab contains:

- **Suggested Contacts:** Displays contacts that are suggested by Oracle Sales as likely contacts for this opportunity, based on previous opportunities with the same product category and customers. Click the Add to Selected Contacts icon to add this suggested contact to Selected Contacts for the opportunity.

- **Selected Contacts:** Displays the contacts for this opportunity. Select the Primary checkbox if this contact is the primary contact for the opportunity. Click the Remove icon to delete the contact from the Selected Contacts list.

  Select a contact and then select Create Task, and click **Go** to create a task for yourself related to this contact. Select Send Proposal and click **Go** to create a proposal.

  Select View Details and click **Go** to view the details for the selected contact.

Products Tab

Displays the products associated with the opportunity. Select a product to view product details.

Also, Additional Information displays any available flexfields.

- **Revenue:** Displays the Forecast Owner for the product and the Sales Group in which the product is forecasted. This enables forecasting for individual products within a single opportunity, even if these products are the responsibility of several sales representatives. You can search for a new owner to be listed in this table. This table is useful if your organization does product level forecasting. This table is available only if your system administrator has personalized the interface.

- **Non-Revenue:** Displays the sales representatives who perform non-revenue forecasts. Click **Add Person** to add non-revenue forecast owners and their sales groups. This table is available only if your system administrator has personalized the interface.

- **Competitors:** Displays the names of competitors, competitor products, and the win/loss status (None, Won, Lost). Click the Remove icon to delete the competitor from this list.

Sales Cycle Tab

This tab is available if there is a sales methodology associated with the opportunity.

Displays the sales stages. These are the stages of the sales cycle for your organization's defined Sales Methodologies. They can include stages like: Stage 1: Qualify, Stage 2: Assess, Stage 3: Propose, and Stage 4: Close.

The stages have defined steps; these are listed for each stage displayed. You can choose to view All Stages, or the Current Stage. Each stage has an overall Sales Coach, and each step has its specific Sales Coach. Click the Sales Coach icon to access. Sales Coaches are lists of questions related to each step of the sales stage.

Select the Completed checkbox as you complete each step.

Click **View Worksheet** to display the Sales Coach worksheet for the selected stage or step in a text editor.

Sales Team Tab

Displays the sales team members for the opportunity.

The Full Access checkbox determines whether the team member can update or only view the opportunity. The default is selected.

The Contributor checkbox enables you to specify if a sales team member has contributed effort (not revenue) to this opportunity. The Contributor checkbox is available if your interface has been personalized by your system administrator.

The Do Not Reassign checkbox determines whether the sales team member can be reassigned by TAP. The default is unselected, unless the team member is the owner, and then it is always selected.

The Owner checkbox determines which sales team member owns the opportunity. There can be only one owner for each opportunity.

Proposals and Quotes Tab

This tab contains:

- **Proposals:** Displays the proposals that have been created for this opportunity.

  Click **Create Proposal**. Oracle Sales uses the functionality of Oracle Proposals. See the *Oracle Proposals User Guide* guide for more information.

- **Quotes:** Displays the quotes that have been created for this opportunity.

  Click **Create Quote**. Oracle Sales uses the functionality of Oracle Quoting. See the *Oracle Quoting User Guide* for more information.

- **Projects:** Displays projects associated with the opportunity. Oracle Projects enables project managers to manage the schedule, resources, finances, issues, and other aspects of their projects. Oracle Sales integrates with Oracle Projects to enable projects to be created and to capture the costs related to the pursuit of opportunities. See the *Oracle Projects User Guide* for more information. The project table is not available unless it has been provided by your system administrator through personalization.

Partners Tab

The Partners Tab is not available unless it has been provided by your system administrator through personalization.

A partner is an indirect sales channel selected to pursue an opportunity. For example, partners can be value-added distributors (VADs) or value-added resellers (VARs). Assignment status indicates whether an opportunity has been assigned to a partner.

Partners are assigned opportunities either manually or automatically. Once assigned, a partner is notified of the potential opportunity, and can accept or decline. If the partner accepts, the partner can view the opportunity. If the partner declines, the opportunity is returned to the vendor and may be routed to another partner. See the *Oracle Partners User Guide* for more information.

Creating a Quote from an Opportunity

Click Create Quote

Oracle Sales uses the functionality of Oracle Quoting. See the *Oracle Quoting User Guide* for more information.

The Create Quote from Opportunity page is displayed, containing the information carried over from the original opportunity. This information includes:

- Opportunity name (which becomes the Quote Name)
- Customer Name
- Customer Address
- Currency
- Sales Channel
- Source Name

Closing an Opportunity

Select a close status in the Status field, and select a Close Reason. Click **Save**.

Viewing Opportunity History

To access history, click **View History** on the Update Opportunity page.

View Information on the Opportunity History Page

You can view the history of an opportunity as it flows through the sales cycle. This history helps you make decisions about further action with the opportunity. The history includes opportunity header, product, and non-revenue product information. Opportunity history is available through personalization performed by your system administrator.

Notes

- **Updated Date From/To:** Enables you to search for and view lead history that occurs between specific dates.

- **Updated By:** Source for the update. Records displayed can be filtered by this source name.

- **Field:** The name of the field that has changed. You can filter the records displayed by selecting the field name of the changed field you want to display.

- **Old Value:** Value for the changed field before it was changed.

- **New Value:** Current value for the changed field.

Customers

A customer is an organization with which your company conducts business.

Viewing, Creating, and Updating a Customer

To view, create, and update a customer:

View a Customer

Views are not available for customers, but you can use the Customer Simple and Advanced Search pages to access your customer data. The customer search pages enable you to create a new customer as well as drill down into detailed information on existing customers.

Note that if you log in as a sales representative who has the Full Access security setting, the customer search results table is initially empty until you conduct a search.

Click **Export** to download the list of customers to a file with a .csv extension that you can use in a spreadsheet application.

Enter Information on the Create Customer and Update Customer Pages

Enter the requested values. When you create a new customer, the only required field is the customer name.

You can:

- **Save and Add More Details:** Create customer and access the Update Customer page. When you have finished working with the Update Customer page, click **Apply**.

- **Apply and Create Another:** Create customer and return to the Create Customer page

- **Apply:** Create customer and return to previously viewed page

Oracle Sales uses Data Quality Management to prevent the redundant creation of customers. If you attempt to create a customer with a name that already exists, or is a close match to an existing customer name, you receive a warning page. From this page, you can choose to either use the new customer, or select an existing customer to use.

Notes

- **Action:** Enables you to select Create Lead or Create Opportunity to create a lead or opportunity for the customer.

- **Alias:** Alternate name for the customer. For example, Big Rock Industries might have an alias of BRI.

- **Status:** Default is Active; you can select a status of Inactive.

- **Address Purpose:** Select a purpose for the customer's address. This can be Bill to, Install at, or another purpose. You can add additional purposes.

- **Registry ID:** System-generated unique identifier for the customer.

- **DUNS Number:** Tax identifier supplied by Dun & Bradstreet.

- **Industrial Classification:** Type of industry for the customer. The Standard Industry Code Standard Classification Systems, such as SIC. For example, the 1987 Edition of the U. S. Industrial Classification Codes.

Profile Tab

Displays products under contract, customer information, customer employee information, financial data, and business activities (opportunities, leads, proposals, orders, quotes, and sales campaigns) for customers.

Notes and Tasks Tab

See the Notes and Tasks Tab, page 3-24 for details.

Contacts Tab

Displays contacts for this customer, including the name, job title, and contact information. See Contacts, page 3-17 for more information.

Address Book Tab

Displays the address, e-mail, telephone number, and website for the customer. You can add or modify this information.

Business Relationships Tab

Displays the business relationships that are important to your customer. These can be divisions, affiliates, partners, or others.

Classifications Tab

Displays the general and industrial classifications for your customer. These classifications are set up using Oracle Customer Online Administration, and are based on lists of government-generated classifications for types of businesses. Use the Update and Remove icons to change or delete a classification.

You can locate a classification to add to your customer by entering a category of classifications and clicking Go. Or, you can create your own classification system and associate it with your customer.

Select the appropriate classification and click **Continue**. Add the end date for the applicability of the classification and click **Finish**.

Sales Team Tab

This tab contains:

- **Sales Team:** Displays the sales team members for the customer.

  The Full Access checkbox determines whether the team member can update or only view the customer. The default is selected.

  The Do Not Reassign checkbox determines whether the sales team member can be reassigned by TAP.

- **Partners:** A partner is an indirect sales channel selected (either automatically or manually) to pursue a lead. For example, partners can be value-added distributors (VADs) or value-added resellers (VARs). This tab displays the partner name, address, and value level. Oracle Sales uses the functionality of Oracle Partners. See the *Oracle Partners User Guide* guide for more information.

Contacts

A contact is a person related to a customer. You create and update contacts within the context of a specific customer.

Viewing, Creating, and Updating a Contact

To view, create, or update a contact:

View a Contact

Views are not available for contacts, but you can use the Contact Simple and Advanced Search pages to access your contact data. The contact search pages enable you access contact records and drill down into detailed contact data if needed.

Click **Export** to download the list of contacts to a file with a .csv extension that you can use in a spreadsheet application.

Enter Information on the Create Contact and Update Contact Pages

Oracle Sales uses Data Quality Management to prevent the redundant creation of contacts. If you attempt to create a contact with a name that already exists, or is a close match to an existing contact name, you receive a warning page. From this page, you can choose to either use the new contact, or select an existing contact to use. Click **Create Contact** to enter information about a new contact for a customer.

Notes

- **Status:** Default is Active; you can select a status of Inactive.

- **Address Purpose:** Select a purpose for the contact's address. This can be Bill to, Install at, or another purpose. You can add additional purposes.

- **End Date:** Date by which the contact should be removed, and is no longer active for the customer.

- **Restrictions:** Indicates whether there are calling restrictions requested by this contact to prevent telemarketing calls. The contact may be in the Do Not Call Registry, or request that they do not get telemarketing calls. This indicator appears in the Restrictions column in the Phone Numbers table on the Update Contact or View Contact pages.

Business Activities Tab

Displays the business activities related to your contact. These can be Open Opportunities, Open Leads, Proposals Received, Quote Received, or Recent Orders and Returns. Select an activity from the menu and click **Go** to view details.

Address Book Tab

Displays the address, e-mail, telephone number, and website for the contact. You can add or modify this information.

You can add calling restrictions by clicking the Update icon in the Phone Numbers table. This enables you to specify if a contact has requested not to receive telemarketing calls. This functionality is available through personalization.

Notes and Tasks Tab

See the Notes and Tasks Tab, page 3-24 for details.

Sales Campaigns

Sales Campaign functionality enables sales managers to explore their installed base and historical customer data, and mine the data for cross-sell and up-sell opportunities. Sales Campaign is integrated with Oracle Marketing, Oracle Content Manager and Oracle Proposals to support the distribution of proposals and sales material for sales initiatives.

When a sales campaign is launched, leads are generated for sales follow up. TAP assigns the appropriate sales representatives to the leads based on predefined rules. If these leads are converted to opportunities, the same sales representatives handle the new opportunities. Each new opportunity is linked to the original sales campaign to enable the marketing and sales organizations to track the progress and success of sales initiatives.

This section contains:

- Creating a Sales Campaign Schedule, page 3-18
- Viewing Sales Campaign Details, page 3-20

Creating a Sales Campaign Schedule

Sales campaign schedules created in Oracle Sales use the Sales Schedule template only. A schedule template provides a framework that includes predefined values and specifications for commonly used schedule attributes, such as the list template and approval requirements for the schedule.

You can also create a Sales Campaign schedule by logging into Oracle Marketing with the appropriate responsibility, navigating to the Campaign Dashboard, and clicking the **Create Schedule** shortcut link. Refer *Oracle Marketing User Guide* for more information.

Associate a Time Line and Set an Objective

After defining a name for the sales campaign, define the related parent Marketing campaign. This enables Marketing to track the success of this sales effort as part of larger enterprise marketing activities. Specify the launch date to define the date from when leads must be generated (the Sales Campaign must be approved before leads can be generated). Define the sales methodology and objective to guide sales representatives. See Sales Methodologies, page 3-8 for more information.

Select the Selling Product

Select a product or product category to use to generate sales leads. In the **Products** table, click **Add Another Row** and define the target product or product category being cross sold or up sold in the sales effort.

You can associate an offer to a Sales Campaign schedule from the Campaign Workbench in Oracle Marketing. Refer *Oracle Marketing User Guide* for more information.

Specify Target Accounts

To define the target group or audience for the Sales Campaign, define the set of accounts in the Target Accounts table. Leads are generated for sales follow up against this target group.

To specify Target Accounts:

- Select a List Template to base your target group selection on. A List Template is a set of filter selections that satisfy a given sales effort purpose. For example, you may want to use a list template that provides the ability to build a cross-sell list based on Orders. Cross-Sell/Up-Sell based on Orders is the default list template available to sales campaigns.

- In the Selections region, enter the values for the selection conditions. To refine the Target Accounts selection, you can modify the selections.

- To generate and display the projected lead counts, click **Recalculate**. Save the details when you have reviewed the lead numbers.

- Use the **Generate List** button to generate the target list and the **Refresh List Status** button to change the status of the list to Available. Statistics for the list are displayed for your reference.

- To remove individual contact entries from the generated list, click **Update Entries**.

Refer *Oracle Marketing User Guide* for more details on List Templates and Selections.

Select a Deduplication Rule

Select a deduplication rule to eliminate duplicates within the Target Accounts list. The rule is also used in suppressing the records from being targeted.

Enable Fatigue Rules

A fatigue rule defines maximum permissible contacts within a specified time period. An example of a fatigue rule is not to contact customers more than two times per month by any channel. These rules enable you to target customers so that they are more receptive to the marketing promotions and messages. If you want fatigue rules to be applied to the Sales Campaign, select the **Enable Fatigue Rules** check box in the Options region.

Click **Preview Fatigue** to view fatigue information in the form of a table and a chart. You can use the fatigue information to decide on the best time to launch a Sales Campaign, that is, when you have the maximum accounts to target.

Associate Sales Collateral

You can define proposal templates that sales representatives can use to generate and fulfill proposals for the Sales Campaign leads. Oracle Sales integrates with Oracle Proposals to make this functionality available.

You can also define the content to be made available to sales representatives such as to help train on product strategy and cross-sell opportunity while working the leads. For this functionality, Oracle Sales integrates with Oracle Content Manager.

Associate Proposal Template

In the **Sales Kit** table, select **Proposals**. You can preview the proposal template before deploying it.

Associate Content

The product/product category you select to generate leads in the Products table drives the content. For example, it might control the sales training content. This content is read-only.

Content items are selected from the Oracle Content Manager (OCM) repository. You may also create the content if you have the necessary access permissions for OCM folders. Refer *Oracle Content Manager User Guide* for more information.

In the **Sales Kit** table, select **Content** and add the content items.

Viewing Sales Campaign Details

The Sales Campaign table in the Sales Dashboard displays summarized data regarding sales campaign schedules. This section contains data related to tracking the leads created from the corresponding sales campaign schedule and data related to tracking the opportunities that resulted from the corresponding Sales Campaign schedule.

Notes

- Drill down the Leads links to review those associated with the Sales Campaign. All the leads are set to be scored as A leads to ensure they are prioritized in the workload for the sales representative queue

- Drill down the Opportunities links to review those associated with the Sales Campaign

- Drill down the Sales Campaign link to preview the associated Product, Target Accounts criteria, and Content

Forecasting

Oracle Sales provides sales organizations with flexibility in managing their forecasts. Sales organizations can analyze their forecast data at opportunity and product levels, enabling management teams to judge the overall health of their organization. Through integration with opportunities in Oracle Sales, opportunity forecasts can be maintained within the opportunity itself. This provides instant visibility to management without the need for users to separately submit forecasts, reducing the time spent by users preparing their forecast. Product family forecasts may be provided to management dependent on, or independent of, the opportunity pipeline.

This section contains:

Oracle Sales 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.

Oracle Sales uses Best, Forecast, and Worst as its default forecasting terminology. These may be personalized by the administrator, if necessary, to use your organization's terminology.

> **Note:** Users that are logged in using the Sales Admin role might have view only access to their manager's forecasting information depending on system settings.

By default, forecast data is displayed in whole numbers. However, you can specify that forecast data be displayed in amounts that contain decimal places. To do so, set the Display Decimal value under Sales Default Preferences to Yes. See User Preferences for Fields for Leads, Opportunities, and Forecasts, page 1-15 for details.

How Best, Forecast, and Worst Values are Calculated

Opportunity product line forecasts default amounts are calculated using weighted pipeline or win probability range. As shipped, Oracle Sales uses weighted pipeline to determine forecast default amounts. This setting can be changed by your administrator. You might want to verify with your administrator the type of defaulting in place for forecast amounts for opportunity product lines.

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.

Creating and Updating a Forecast

Select Forecast Parameters

Use these parameters to determine which opportunities to include in your forecast. Opportunities included in the forecast must be in an opportunity status that can be forecasted, belong to the user for the Sales Group selected (or to a subordinate group for managers), have a forecast date that falls within the selected Period, and contain product lines that belong to a product category that maps to the selected Category. Forecast Type enables you to choose between a revenue and a non-revenue forecast. If you select non-revenue, you can select the type of non-revenue forecast. The parameters Forecast Type and Revenue Type are available through personalization by your system administrator if your organization uses product-level forecasting.

Modify these parameters and click **Go** to change the composition of the forecast.

The Export Opportunities button is available through personalization. Click **Export Opportunities** to quickly download to a spreadsheet all opportunities that match the forecast parameters criteria. Click **Yes** when the ActiveX box appears. This particular spreadsheet template enables you to view and format a large number of opportunities.

> **Note:** The Opportunity Filter does not affect the opportunities that you download using Export Opportunities.

View the Opportunity Forecast Summary

This forecast summary is calculated based on the opportunity line pipeline and forecast values, from the Opportunity Forecast Detail, that make up the forecast. These values are rolled up based on the product category to which they belong.

View/Edit the Opportunity Forecast Detail

This worksheet enables you to view the specific opportunities (and the opportunity lines) that make up the forecast. The opportunity line forecast values that can be edited (Best, Forecast, and Worst) are shared with the Opportunity page, so, any updates made to the opportunity forecast within the opportunity are displayed in the forecast page. You may view the details of the opportunity by clicking the opportunity name.

You may visually filter opportunities from the forecast by clicking Opportunity Filters, then entering your filter criteria. Opportunities that are filtered are not excluded from your forecast, but rolled into a summary line (identified as Other Opportunities) in the Opportunity Forecast Detail.

These totals from this worksheet roll up to the product categories and totals shown in the Opportunity Forecast Summary.

Click **Export** to copy the contents of the Opportunity Forecast Detail to a spreadsheet. The Export button is available through personalization.

Create Forecast Notes

You may submit notes to your manager to provide additional detail along with your forecast by entering text in the box on the left of the Notes section, then clicking Add Note.

View Forecast History

You can view a summary of previous submissions of your forecast. Click the Submission Date for a forecast to view the details of a particular submission.

View/Edit Your Forecast Worksheet

This worksheet enables you to provide forecast judgment, beyond the opportunity pipeline, at the product family level. You may choose to begin with a saved Forecast Worksheet, from the last time the worksheet was saved or submitted, or default values from the opportunity pipeline, by selecting either Current Opportunity or Previously Saved from the Worksheet Default Values menu. The worksheet can display up to 200 rows, but will not display more than that number of rows. Note that any amounts associated with rows that are not displayed will not be shown in the total for the worksheet.

Save the Forecast or Submit the Forecast

After editing the desired forecast values, click **Save** to save the forecast to complete at a later time, or click **Submit** to immediately submit the forecast to your manager. Once a worksheet is saved or submitted, Oracle Sales calculates Judgment for each forecast

value. Judgment is calculated as the difference between the product category forecast value entered in the Forecast Worksheet, and the corresponding value in the Opportunity Forecast Summary. Judgment enables you to determine the difference between a salesperson's forecast in the worksheet and actual forecast amounts in the opportunity lines.

Download Your Forecast Worksheet

Click **Export** to copy the contents of the Forecast Worksheet to a spreadsheet.

Forecasting as a Sales Manager

As a sales manager or executive, your forecast is similar to that of a sales representative, with the following differences:

- Option to default Direct Report Submitted forecast values (through the Worksheet Default Values menu) for each product category in the Forecast Worksheet. This is in addition to Previously Saved and Current Opportunity defaulting options.

- Inclusion of the name of your Direct Report who has forecast ownership for each opportunity product line in the Opportunity Worksheet Detail.

- In the Opportunity Forecast Detail Worksheet, you will see some opportunities that you cannot edit. These opportunities are owned by your subordinates.

- Direct Reports Forecast Detail displays a summary of each direct report's individual forecast, with a link to additional details for each direct report. All of your direct reports are listed, whether they have submitted a forecast or not. An icon in the Status column indicates if a forecast was submitted, if a forecast was submitted with a currency conversion error, or if a forecast was not submitted.

Tasks

Oracle Sales enables you to add or modify tasks related to your sales activities. Your tasks are listed in the Calendar & Tasks section of the Sales Dashboard.

Click **Export** to download the list of tasks to a file with a .csv extension that you can use in a spreadsheet application.

Creating and Updating Tasks

Enter Information on the Create Task and Update Task Pages

When complete, click **Apply**.

Notes
- **Source Visibility:** Enables you to set the visibility level of the task: internal, private, or public.

- **Set as Primary:** Select a contact and click Set as Primary to set a contact as the primary contact for the accomplishment of the task. Only one contact can be designated as primary.

Notes and Tasks Tab

The Notes and Tasks tab appears in these areas of Oracle Sales:

- Leads

- Opportunities

- Customers

- Contacts

It contains:

- **Notes:** Displays notes and enables you to add notes. Notes can have these statuses:

    - **Private:** Viewed only by the creator of the note

    - **Public:** Viewed by any Oracle Applications user

    - **Publish:** Viewed by external users, such as partners. This status is available through personalization.

- **Tasks:** Lists tasks and enables you to add tasks by clicking Add Another Row.

- **Attachments:** Enables you to add external documents, files, and web addresses to your lead. These attachments are carried over when the lead is converted to an opportunity. Attachments can include:

    - Files created using third party applications, including graphics files such as .jpg. File attachments can come from your hard disk or external storage, or they can come from the Document Catalog. The Document Catalog contains all documents that have been attached to applications data in Oracle Applications.

    - Web addresses (web pages on the Internet or intranet)

    - Text that you can enter into or paste onto the Add Attachment page

        To add a file as an attachment, select File/Web Page/Text and click **Browse**. To add an item from the document catalog, select Document Catalog File and then search for the item. You can search on any of the document attributes, such as name, category, or usage type.

        A document can have the usage types of Template, Standard, or One-Time. Template and Standard types of documents are created using Oracle Applications. See the *Oracle Applications User Guide* for additional information.

        One-Time usage type documents are created when a file, web page, or text is created using Add Attachment. Click an attachment name to view an attachment.

Calendar

The calendar in Oracle Sales enables you to note appointments related to your sales activities. Your appointments are listed in the Calendar & Tasks section of the Sales Dashboard.

Creating and Updating Appointments

Enter Information on the Create Appointment and Update Appointment Pages

Appointments that you add appear in the Calendar table on the Sales Dashboard.

Notes

- **Check Availability:** Click to check resource availability for your activity. Click **Add Location** to add a location for your appointment.

People and Resources Tab

Displays your calendar, and the calendar of the resource with which you are attempting to create an appointment. Click the search icon to search for people with which to book appointments. The people you add must be recognized resources. Once you find the person, select them and click **Select**. Then, click **Add** to add them to your appointment schedule.

Click **Show** or **Hide** to display or hide details about the people in your appointment schedule.

Details Tab

Displays the details associated with your appointment, such as the access to the appointment, and whether you want a reminder.

Repeating Tab

Enables you to specify if the appointment is a repeating event, like a regular weekly meeting.

Related Information Tab

Enables you to add notes and attachments to the appointment.

Quotes

Oracle Sales uses the functionality of Oracle Quoting. See the *Oracle Quoting User Guide* guide for more information.

A quote can be created directly from an opportunity. An example for Oracle Sales:

1. A sales representative is working on a opportunity for ABC, Inc. ABC, Inc. requests a quote for printer products and services be mailed to them.

2. The sales representative generates the quote based on the prices of the products in the opportunity. Information from the opportunity is defaulted into the quote template.

3. The quote is printed and mailed to ABC, Inc.

4. The sales representative is able to view all quotes generated for that opportunity.

Proposals

Oracle Sales uses the functionality of Oracle Proposals. See the *Oracle Proposals User Guide* guide for more information.

A proposal can be created directly from a lead, an opportunity or a quote. An example for Oracle Sales:

1. A sales representative is working on an opportunity for XYZ, Inc. XYZ, Inc. requests a proposal be mailed to them.

2. The sales representative generates the proposal based on the opportunity details. Information from the opportunity is defaulted into the proposal template.

3. The proposal is printed and mailed to XYZ, Inc.

4. The sales representative is able to view all proposals generated for that opportunity.

Sales Commission Statements

Oracle Sales uses the functionality of Oracle Incentive Compensation to enable you to view sales commissions, bonuses, and payment adjustments. See the *Oracle Incentive Compensation User Guide* for more information.

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.