

ORACLE SALES OFFLINE

KEY FEATURES

- Customer and Contact Management
- Lead Management
- Multi-org Support for Quotes
- Opportunity Management
- Forecast Management
- Sales Methodology and Stage
- True Team Selling
- Offline Access to Sales Information
- Enhanced Conflict Resolution

Oracle® Sales Offline is an integrated solution with Oracle Sales, offering field sales representatives the ability to leverage enterprise selling information while mobile. Sales representatives may operate on their laptops without a connection – wired, wireless, or otherwise. They may add, view and edit their customers, opportunities, leads, and quotes right from their laptop, saving the changes for upload later. Sales organizations optimize their selling time in the field by having key customer information available at their fingertips. This enhances the long-term relationships with customers and promotes company profitability. Oracle Sales is integrated with the Oracle Customer Relationship Management (CRM) Sales family applications and is designed to maximize selling effectiveness in the mobile environment. Oracle Sales Offline is part of the Oracle E-Business Suite, an integrated set of applications that are engineered to work together.

Overview

Oracle Sales Offline offers sales organizations the functionality they require in a simple, easy interface that is both familiar and effective. Leveraging the capabilities of desktop applications, Oracle has designed a template that provides sales organizations a way to manage their sales information without the need to install additional software. The template is easily downloaded from Oracle Sales and provides upload/download data capabilities. Oracle Sales Offline provides users the ability to view and edit their sales information, while providing IT organizations an easy to support application. No additional technical software to support on laptops for IT organizations.

True Team Selling

To manage and close deals successfully, sales teams often cross group boundaries, territories and even company lines. Oracle Sales Offline works seamlessly with Oracle Sales and Oracle Telesales to create a virtual sales team that enables the sharing of opportunities, contacts, notes, and other pertinent customer information between sales team members. Opportunities can be automatically or manually assigned to sales members. Field salespersons are able to see valuable information from teleagents about their accounts as they prepare for onsite meetings. Oracle's sales automation modules complement each other and provide the perfect solution for team selling in a dynamic selling environment.

Access to Sales Information

Customer Management - Oracle Sales Offline gives sales representatives the information they need to manage their sales efforts when they are on the road. Mobile sales agents have access to detailed customer information, product interests and notes about their customers. Contact information lets representatives identify key players within their accounts and share that information with other members of the sales team.

Contact Management - Sales people need to contact a number of customers and contacts to evangelize the products and services of the company. Oracle Sales stores name, job title, email, telephone, address, and department information for these contacts, and tracks interactions, whether it is creating callbacks, follow-up activities, or notes. When entering new contacts, data quality functionality searches for similar existing contacts to help prevent duplicates being created.

Lead Management - Sales agents can manage leads and qualify them into sales opportunities. Leads can be prioritized so that sales representatives can target their activities on hot leads first. Oracle Sales Offline gives sales agents access to lead information such as notes history, key contacts, and product interests.

Opportunity Management - Opportunities can be managed remotely through the sales cycle. Oracle Sales Offline gives sales agents access to opportunity activities and statuses, notes history, key contacts and sales credits information. A sales representative may update the opportunity information by adding new notes, changing the opportunity status, and adding product interests. Access to this information and the ability to update it enables the sales organizations to sell more effectively. Sales team members can share information about call activity, major issues and account strategy. Opportunity details screen lets you track key information and manage the opportunity through the sales cycle.

Identify Leads and Opportunities Quickly

Support for the native Auto-Filter provided within Excel allows users to filter data based on column headers that are exposed on each summary sheet. Sales Offline will also allow users to further filter Customer information via a new 'Address Filter' form on the Organization, Person and Contact summary sheets. The 'Address Filter' form will only be available on the customer sheets, and the form will allow users to pick a Country and search and filter customers within this country.

Opportunity	Customer	Stage	Win Probability	Status	Close D
Accessories/Monitors 2001	World of Business	Stage 2 - Qualifying	90	(All)	14-F
AT&T Multimedia 2001	AT&T Universal Card	Stage 1 - Prospecting	30	(Top 10...)	01-J
Sun - Laptop 2001	Sun Microsystems	Stage 1 - Prospecting	10	(Custom...)	01-J
Bigmart Multimedia Deal - 2001	Bigmart	Stage 6	100	Active Prospect	29-J
Ryland - Custom laptops	Ryland Homes	Stage 5	95	Forecast	01-J
DH&H Laptops - 2001	Department of Health & Human Services	Stage 1	10	Lost	01-J
Dep of Transportation Desktops - 2001	Department of Transportation	Stage 2 - Qualifying	10	New Opportunity	01-J
Scott Accessories - 2001	Scott Weeks Construction Inc	Stage 2 - Qualifying	60	Offered	01-J
New Interaction Center	World of Business	Stage 1	10	On Hold	01-J
10 Deluxe Laptops	World of Business	Stage 1 - Prospecting	60	Preliminary	31-
Big 4 Rental Desktops Feb 2001	Big 4 Rental	Stage 6	100	Recycled	15-F
Big 4 Rental Desktops Mar 2001	Big 4 Rental	Stage 6	100	Repeat	15-M
Big 4 Rental Desktops Apr 2001	Big 4 Rental	Stage 6	100	Upside	15-M
Big 4 Rental Desktops May 2001	Big 4 Rental	Stage 6	100	Won	15-M
Big 4 Rental Desktops Jun 2001	Big 4 Rental	Stage 6	100	Won	15-J
Big 4 Rental Desktops Jul 2001	Big 4 Rental	Stage 6	100	Won	15-
Bluelight Accessories Feb 2001	Bluelight.com	Stage 4 - Close	100	Won	18-F

Figure 1: An example of Auto-Filter when ranking or selecting opportunities based on current status

Multi-Org Access Control for Quotes

Users can define which operating unit's Quotes they wish to download and upload. Allows users to view and create quotes for operating units to which they have access without changing responsibility. An Operating Unit drop-down has been added to the Sync Preferences form, Quote Tab. The dropdown displays the users default operating unit, and any other operating unit the user is associated with. The operating unit(s) is linked to the user's login responsibility.

The product information displayed to the user in the Sync Preferences - Quote tab are those values associated to the Operating Unit the user choose in the Operating Unit drop-down. The Inventory Category Set, Inventory Category are not dynamically generated based upon the value in the Operating Unit dropdown. Price List and product are filtered based on operating unit.

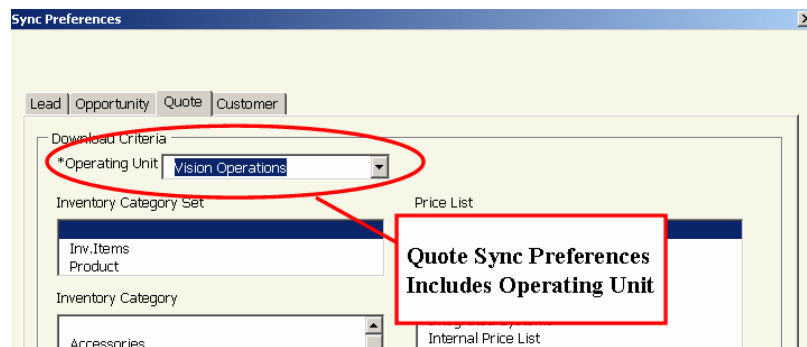


Figure 2: Sales users can view quote details for some or all of the operating units they belong to

Opportunity Forecasting

Users have the ability enter forecast numbers in the opportunity screens. This feature saves time as the forecast information flows directly into managers forecast numbers without the sales reps having to submit separate forecast numbers. Providing this information allows sales team members to always stay up to date on what is happening with their deals and to supply sales management with true, accurate sales forecasting.

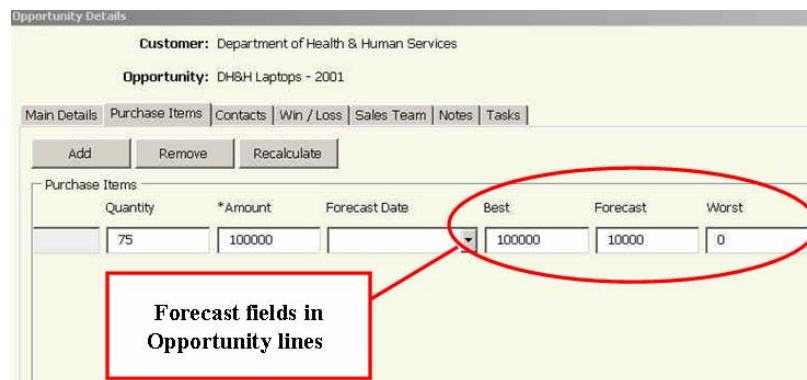


Figure 3: Forecasting numbers can be entered directly on the opportunity screen for ease of use

KEY BENEFITS

- Easy installation and low IT costs
- Fully disconnected access
- Synchronization of data for sending and receiving updates

RELATED PRODUCTS

The following products are available from Oracle:

- Oracle Sales
- Oracle Sales DBI
- Oracle Telesales
- Oracle Proposals
- Oracle Sales for Handhelds
- Oracle Marketing
- Oracle Incentive Management

RELATED SERVICES

The following services are available from Oracle Support Services:

- Oracle E-Business Suite Accelerators
- Oracle Application Solution Centers
- Oracle University
- Oracle Consulting

Flexible Sales Methodologies

Sales Methodology and Sales Stage fields have been incorporated into the Create Lead and Lead Details pages, providing more important information for sales people to manage their leads effectively.

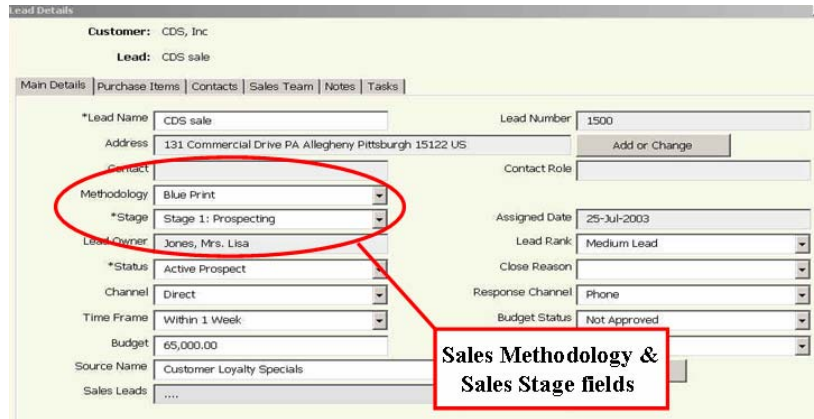


Figure 4: Sales users can specify the sales stage and methodology when capturing lead information

Oracle E-Business Suite — The Complete Solution

Oracle E-Business Suite enables companies to efficiently manage customer processes, manufacture products, ship orders, collect payments, and more—all from applications that are built on unified information architecture. This information architecture provides a single definition of customers, suppliers, employees, and products—all aspects of the business. Whether one module or the entire Suite is implemented, Oracle E-Business Suite enables procurement professionals to share unified information across the enterprise and make smarter decisions with better information.

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