

# **Oracle® Fusion Applications Sales Guide**

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Oracle® Fusion Applications Sales Guide

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# Preface

This Preface introduces the guides, online help, and other information sources available to help you more effectively use Oracle Fusion Applications.

## Oracle Fusion Applications Help

You can access Oracle Fusion Applications Help for the current page, section, activity, or task by clicking the help icon. The following figure depicts the help icon.



You can add custom help files to replace or supplement the provided content. Each release update includes new help content to ensure you have access to the latest information. Patching does not affect your custom help content.

## Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. You can access the guides from the **Guides** menu in the global area at the top of Oracle Fusion Applications Help pages.

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### Note

The **Guides** menu also provides access to the business process models on which Oracle Fusion Applications is based.

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Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.
- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.
- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

- **Security Reference Manuals** describe the predefined data that is included in the security reference implementation for one offering. They are intended for implementors, security administrators, and auditors. They are organized by role.

These guides cover specific business processes and offerings. Common areas are addressed in the guides listed in the following table.

Guide	Intended Audience	Purpose
Common User Guide	All users	Explains tasks performed by most users.
Common Implementation Guide	Implementors	Explains tasks within the Define Common Applications Configuration task list, which is included in all offerings.
Information Technology Management, Implement Applications Guide	Implementors	Explains how to use Oracle Fusion Functional Setup Manager to plan, manage, and track your implementation projects, migrate setup data, and validate implementations.
Technical Guides	System administrators, application developers, and technical members of implementation teams	Explain how to install, patch, administer, and customize Oracle Fusion Applications.

For guides that are not available from the Guides menu, go to Oracle Technology Network at <http://www.oracle.com/technetwork/indexes/documentation>.

## Other Information Sources

### My Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info> or visit <http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs> if you are hearing impaired.

Use the My Oracle Support Knowledge Browser to find documents for a product area. You can search for release-specific information, such as patches, alerts, white papers, and troubleshooting tips. Other services include health checks, guided lifecycle advice, and direct contact with industry experts through the My Oracle Support Community.

### Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications provides visibility into service-oriented architecture assets to help you manage the lifecycle of your software from planning through implementation, testing, production,

and changes. In Oracle Fusion Applications, you can use the Oracle Enterprise Repository for Oracle Fusion Applications at <http://fusionappsoer.oracle.com> for:

- Technical information about integrating with other applications, including services, operations, composites, events, and integration tables. The classification scheme shows the scenarios in which you use the assets, and includes diagrams, schematics, and links to other technical documentation.
- Publishing other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

## Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at <http://www.oracle.com/us/corporate/accessibility/index.html>.

## Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to [oracle\\_fusion\\_applications\\_help\\_ww\\_grp@oracle.com](mailto:oracle_fusion_applications_help_ww_grp@oracle.com). You can use the **Send Feedback to Oracle** link in the footer of Oracle Fusion Applications Help.

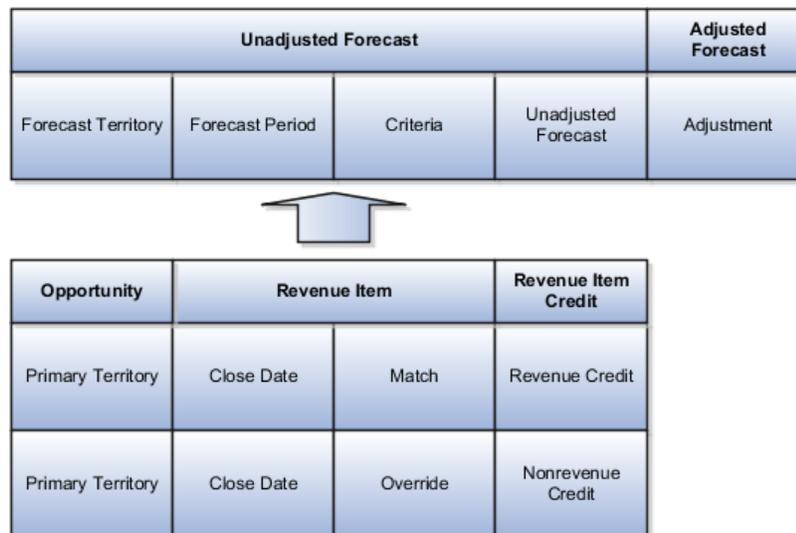


# Manage Sales Planning and Forecasting

## Sales Forecast Components: How They Work Together

A sales forecast for a territory encompasses a time period and sales opportunities that meet defined criteria. Salespeople submit their forecasts to their managers, who make any needed changes and in turn submit the forecasts to their managers.

This figure shows the components for a territory forecast. Revenue items from opportunities form the unadjusted forecast. If the revenue item has multiple sales credits, then the revenue item is visible across multiple forecasts. Salespeople add adjustments to the forecast. Adjustments can be applied at a summary or item level.



### Revenue Items

A revenue item from an opportunity must have a designated close date that falls within the forecast period to be included in the forecast.

The criteria for the revenue item must match the criteria set for the forecast. For example, if the forecast criteria specify a win probability of greater than 75 percent, then a revenue item with a win probability of 80 percent is added to the forecast.

If the ability to override is enabled, then a salesperson can include a revenue item in the forecast even though it does not match the criteria, or exclude a revenue item that matches the criteria.

It is possible for managers to pull in forecast items as adjustments that do not match the close date or criteria and override conditions.

### **Unadjusted Forecast**

The unadjusted forecast is the total of all revenue items that match the forecast criteria or that are included by overrides. All revenue items must have close dates within the forecast period.

Salespeople can add a positive or negative adjustment on top of the unadjusted forecast to form an adjusted forecast.

Managers and nonrevenue credit recipients can pull in forecast items as adjustments that do not match the close date or criteria and override conditions. Also, managers and nonrevenue credit recipients can drop items as adjustments, regardless of close date or match and override conditions.

## **Sales Forecast Adjustments: Explained**

An adjustment is a positive or negative number that adjusts your own or a subordinate's unadjusted forecast up or down.

The adjusted best case forecast is the sum of:

- The best case for all forecasted items
- The sum of item-level adjustments for the best case
- Any summary level adjustment to best case

The adjusted worst case forecast is the sum of:

- The worst case values for all forecasted item
- The sum of item-level adjustments for worst case
- Any summary level adjustment to worst case

The estimated adjustment metric is the sum of the difference between estimated revenue and revenue for all transactions in the forecast period. Oracle Fusion Sales Prediction Engine uses statistical analysis to provide the estimated revenue amounts based on historical sales for the product associated to the revenue item.

You enter summary level adjustments by selecting Adjust from the Actions menu.

If you forecast by product, by product and channel, or by product, channel and time, then your administrator enables the Forecast Summary tab that provides different views for making detailed adjustments, and the adjust action is no longer available.

## **Unallocated Forecast Adjustments: Explained**

In the Forecast Summary tab, whenever a parent has children, an additional child is added called Unallocated. A deal that is for the parent itself appears

as unallocated until you can determine which child to move the deal to. When an adjustment is made to the parent the adjustment amount appears in the Unallocated child row until you distribute it among the children using one of several ways.

You can manually alter the children until the unallocated amount reaches zero. If you over-allocate without reaching zero, then the unallocated amount can become negative.

When the unallocated amount is zero, you can make changes to the child forecasts and the parent automatically recalculates to include your changes in the total.

Use the Allocate to children action to divide the amount up proportionately amongst the children based on the percentage that each child makes up the parent adjusted forecast. If all children are zero, then the amount is divided equally

### **Forecasting by Product, Channel, and Time**

Start your forecast adjustments at the most granular level of product, channel, and time, and your adjustments are calculated for you in the higher level views of product as well as channel. If you start at the summary level, by product, then your adjustments appear as unallocated amounts for channel and time as well as for lower levels of the product hierarchy. You then need to divide the unallocated amounts down the product hierarchy and among the dimensions for channel and for time.

You can choose to forecast only by product, by product and channel, or by all three.

## **Export of Forecast Data: How It's Processed**

You can export visible forecast data to spreadsheet, if you have the correct privileges.

### **How Forecast Export Is Processed**

The forecast data is exported to an .xls file only. Your version of Microsoft Excel may only support 64,000 rows.

Hidden information does not export. Therefore, you need to expand territory hierarchies and reveal any hidden columns to include them in your export.

## **FAQs for Manage Sales Planning and Forecasting**

### **How can I add revenue items to a forecast?**

To add revenue items to a forecast, search for revenue line items in your territory and add them to the forecast. For any revenue item with a warning icon, you must change any attributes that do not meet the forecast criteria. When all attributes fall within the forecast criteria, the revenue item becomes part of your forecast.

You can also use a forecast override if the administrator enabled it for your territory. You can set Forecast Option to Always to override the lack of matching forecast criteria. An icon warns you when a revenue item does not match the forecast criteria and requires the forecast override.

If you are unable to edit the forecast item you are adding, then the item is added with the unadjusted forecast amount set to zero. However, the item now has a positive adjustment amount to match the original revenue item revenue amount. For example, if the revenue amount is 3,000, then the unadjusted forecast is 0, the forecast adjustment is 3,000, and the adjusted forecast is 3,000. You can further refine the adjusted forecast item amount, or remove the forecast item if you no longer want the item included in the forecast.

### **How can I remove forecast items from a forecast?**

Select the forecast item and click the remove icon. For any revenue item with a warning icon, you must change any attributes so that the revenue item does not meet the forecast criteria or so that the forecast item no longer closes within the forecasting period.

You can also use a forecast override if the administrator enabled it for your territory. You can set Forecast Option to Never to override the matching forecast criteria. An icon warns you when a revenue item matches the forecast criteria and requires the forecast override.

If you are unable to either change the forecast criteria for the item or use the override, the item disappears from your forecast items list, but the unadjusted forecast amounts remain the same. However, the item now has negative adjustment amounts to match the unadjusted forecast amounts. For example, if the unadjusted forecast amount is 3,000, then the forecast adjustment is negative 3,000 and the adjusted forecast is 0. With the removed forecast item selected, you can add it back in if you want to include the item back in the forecast.

### **When does my forecast appear in my currency?**

If your currency is different from the corporate currency, then select the desired currency. The default selection is your preferred currency. In addition to seeing information in your currency, you will also see some information in the corporate currency. Forecast item detail transaction information remains in the transaction currency.

### **When do I submit my forecast?**

You can submit your forecast after the territory freeze date and before the forecast due date. Make all of your item and summary forecast adjustments. You can submit your child territory forecasts on behalf of your subordinates and then make adjustments to your forecast before submitting.

### **What happens if I submit my forecast?**

You cannot make adjustments or update your forecast after you submit it. Your manager can make adjustments to your forecast only after your submission. If your manager rejects your forecast, you can further adjust the rejected forecast and then resubmit it.

### **What's a likelihood to buy product?**

The likelihood to buy product metric reflects the percentage of confidence that a deal will close with the specified revenue on the specified close date. Oracle Fusion Sales Prediction Engine uses statistical analysis to provide the likelihood to buy product based on historical sales for the product associated to the revenue item.

### **What's an estimated revenue?**

Estimated revenue is the potential revenue from the revenue line item. Oracle Fusion Sales Prediction Engine uses statistical analysis to provide the estimated revenue amounts based on historical sales and other metrics for the product associated to the revenue item.

### **What's a pipeline?**

The pipeline metric is the total revenue amount of all revenue line items where the Status category is Open, the primary territory is the target territory, and the close date lies in the forecast period. Unforecasted pipeline is the total revenue amount of all revenue line items without a corresponding forecast item, where the status category is Open, the primary territory is the target territory, and the close date lies in the forecast period.

### **What's an expected forecast?**

The expected forecast metric is the sum of all weighted revenue values for all forecast items in the forecast period. Weighted revenue is the revenue amount multiplied by the probability of the deal closing.

### **What's a quota?**

The quota metric is the revenue target associated with the expected performance of a salesperson's territory for a given forecast period.

### **What's closed revenue?**

The closed revenue metric is actual revenue for the target territory that was closed during the forecast period.

### **What's a best case forecast?**

The best case forecast metric is the sum of all best case revenue values for all forecast items in the forecast period.

### **What's a worst case forecast?**

The worst case forecast metric is the sum of all worst case revenue values for all forecast items in the forecast period.

### **What happens if I allocate an adjusted forecast to children?**

The unallocated amount for a parent is added to the amounts for all the children so that the unallocated is zero.

The unallocated amount is divided up proportionately amongst the children based on the percentage each child makes up the parent adjusted forecast. If all children are zero, then the amount is divided equally.

### **Why did the parent adjusted forecast not change when I adjusted the child?**

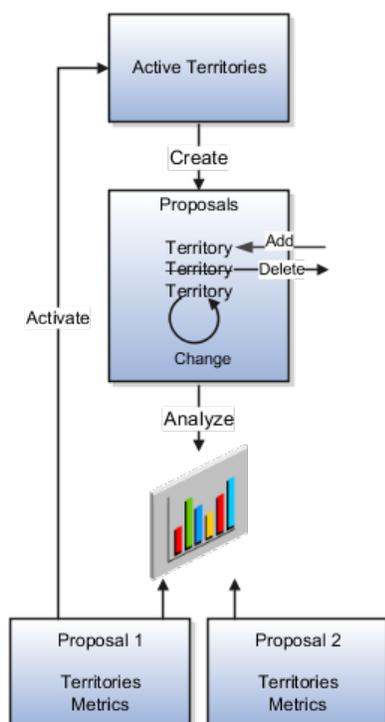
The unallocated amount at the child level must be zero for adjustments to be added directly to the parent total. Child level adjustments are added to or subtracted from the unallocated amount until unallocated is exactly zero.

## Manage Sales Territories

### Territory Components: How They Work Together

Territories are used to define the jurisdiction of responsibility of a salesperson over a set of sales accounts. Sales managers use territory proposals to change territory definitions. Managers can create more than one territory proposal and use metrics and graphs to compare and analyze their proposed territories for fairness, effectiveness, and alignment with current sales goals. Managers then activate the best territory proposals.

This figure shows the use of territory proposals to add, change, and delete territories. After analysis, managers activate final territory proposals.

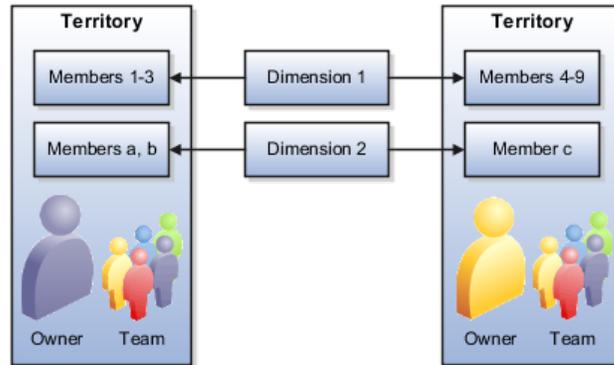


### Territories

A territory, whether active or part of a territory proposal, includes several elements. One or more dimensions, such as geography, define the boundaries

of a territory according to selected dimension members, such as Europe or Asia. Every territory is assigned an owner and can have additional territory team members.

This figure shows two territories defined using the same two dimensions but different dimension members. Each territory has an owner and a sales team.



## Territory Dimensions: Explained

Dimensions are attributes that define jurisdictional boundaries of territories. For example, the geography dimension can be used to define territories by country or postal code. Territory dimensions are used to assign sales accounts, partners, leads, and opportunities to the correct territories.

Each territory dimension is matched to an attribute of the object being assigned. Product and Sales Channel dimensions are matched to lead and opportunity attributes directly. The rest of the dimensions are matched to sales account attributes either when assigning sales accounts to territories, or when assigning leads and opportunities to territories, in which case the sales account for the transaction is used. All dimension values combine to define the territory boundaries. For example, if Geography = United States and Product = Green Servers, then the territory boundaries are United States AND Green Servers.

The dimensions available for defining territories are:

- Account
- Account Type
  - Named or Not Named
- Customer Size
  - From the Organization Size lookup
- Geography
- Industry
- Organization Type
  - The organization type hierarchy is from the customer classification module.
- Partner
- Product

A hierarchy from the Sales Catalog. Used to assign leads and opportunities, but not accounts.

- Sales Channel

Used to assign leads and opportunities, but not accounts.

- Auxiliary 1, 2, 3

Your administrator enables the dimensions your organization uses for defining territories. The administrator also selects the dimension members that appear in the selection list when defining territory dimensions. All invisible dimension members appear in an Others category in the selection list. An Unspecified dimension member captures objects with insufficient matching values.

Dimension members are populated through synchronization with the source data. For example, products synchronize from the product catalog. Changes to the source data can impact the assignment of sales accounts, leads, and opportunities after the changes are synchronized with territory dimension members. For example, a sales account that was designated as not named is changed to named account, or a product line is removed from the sales catalog. Therefore, it is a good practice to run full reassignment processes for leads, opportunities, and accounts after synchronizing dimension changes.

## **Account**

Sales accounts and their hierarchies are maintained in the Oracle Fusion Customer Center application.

Sales accounts are Parties with the usage Sales Account and a sales account profile containing sales information specific to the party. When a party has one sell-to address, it ceases to be a sales prospect and becomes a new sales account. When the party purchases something, it changes from a new to an existing sales account. When defining a territory, you can select an individual account to include in the territory despite the fact that it does not meet the boundaries set in the regular coverage. You also have the option to select the individual account to exclude it from the territory despite the fact that it does meet the dimension selections in the regular coverage for that territory. The selection for inclusion or exclusion does not contain the hierarchy for the sales account.

The account must be designated as Named in Customer Center before it can be selected as a named account using the Account dimension in the regular coverage for the territory definition. When defining territories, you can select named accounts that fall within the other dimension definitions for the hierarchy. You can also select named accounts that do not fall within the other dimension definitions provided the accounts are higher in the customer hierarchy above a selected named account that does fall within the other dimension definitions.

The administrator can enable the Account dimension using the following choices:

- Enable for both named accounts in regular coverages and selected sales account inclusions and exclusions.
- Enable only for selecting individual sales accounts for inclusions and exclusions. Named accounts are not available in the regular coverage.
- Disable the Account dimension so neither named accounts are available in regular coverages nor sales accounts available for inclusions or exclusions.

## Geography

Geography is defined as a physical space, with boundaries, on the surface of the earth.

Geography Type is a divisional grouping of geographies, and can be either one of two types:

- **Master:** Any record or object in Fusion that has a street address, in any country in the world, uses Master Reference Geography Types to define that address. Master reference geography data is imported into the application, not set up manually. This importing can be done for you if you are using Oracle Fusion CRM Cloud Service. If it has not, it can be imported into the application using the Manage File Import Activities setup task in Setup and Maintenance.
- **Zones:** A convenient, customized grouping of geographies. For example, you can group several states into a zone called Northwest. Zones have to be defined and created manually, so they are optional. No other Fusion application uses them besides Territory Management, and you only want to use zones to define your sales territories if the boundaries of your sales territories do not strictly follow the Master Geography structure (that is, if they are regional and go outside the official country specific structure, for example are different than state-county-city-ZIP code in the case of the United States).

Since zones are user defined, they are subject to interpretation. In order to use them, you need company-wide consensus on their definition. This means across all business units, and all lines of business that sell to the same account.

Zones together with master geographies are organized in a hierarchy. Setting up the territory hierarchy using Manage Territory Geographies is a prerequisite to enabling the geography dimension, whether or not you choose to include zones in the hierarchy.

## Industry

The industry hierarchy is from the customer classification module.

The profile option Industry Classification Category must be set to the classification category that you want to use as the basis for the industry dimension before you can enable the dimension. The available selections include only classification categories belonging to the Industrial Categories grouping.

## Partner

A partner is an organization party with a partner profile associated and an assigned Partner usage. Partners are defined in the Partner Center. You can select individual partners to include in the definition of a partner centric territory. You can also select individual partners to exclude from the partner centric territory coverage.

The administrator can enable the Partner dimension for manual inclusions and exclusions. The Partner dimension is not available for regular coverages.

## Sales Channel

The sales channel dimension supports indirect sales through channel partners. You can create partner specific territories, structured by the sales channel

dimension, in addition to the other available dimensions. The available sales channels are Direct, Indirect, and Partner. The sales channel dimension applies to leads and opportunities, but not to sales accounts.

### **Auxiliary 1, 2, 3**

You can define up to three auxiliary dimensions based on the customer classification model. Define classification categories first and associate them to the Customer Categories grouping.

The profile option Classification Category for Auxiliary Dimension 1 (2, 3) must be set to the classification category that is the basis for the auxiliary dimension before you can enable the dimension. The available selections include only classification categories belonging to the Customer Categories grouping.

## **Territory Proposals: Explained**

A territory proposal is a sandbox container used to model territory changes. Sales executives and managers use territory proposals to model different ways to partition their territories and view the results without affecting the active territory definitions, until they are satisfied with a model and activate territory proposals.

Territory definitions are used to assign territories to work objects such as leads, opportunity revenue items, and accounts. Changes defined and activated as part of proposals usually cause reassignment of these work objects based on the new definitions.

### **Actions**

Following are the actions one can take with territory proposals:

- Create the proposal and set an activation date.
- Define territories in a territory proposal, including coverages and a territory team.
- In a centralized territory management model, a sales administrator creates or changes territory definitions for territory hierarchies owned by different sales managers.
- In a decentralized territory management model, a sales manager shares or publishes territories within a proposal to the owners of those territories. This allows the owners of the child territories to in turn reflect any required changes down to their own child territories.
- In a decentralized territory management model, a territory owner makes any necessary changes and submits proposals back to the manager who published the proposal.
- The owner of a parent territory updates a proposal with changes to a child territory when the owner is absent. The parent territory owner then publishes changes to the absent owner's subordinates.
- Restore a territory to a definition that is different than the one specified in the proposal: the active definition or an historical definition.
- Validate proposed territories to check for invalid dimension members, gaps, and overlaps.

- Review metrics and graphs to analyze proposals for such things as number of accounts and number of sales opportunities in each territory.
- Preview assignments of accounts, revenue, and leads for a proposed territory.
- Activate a proposal. If there are no invalid territories, the proposal remains in pending activation status until the date is reached.
- The owner can reopen a proposal that is pending activation if there is a need to update the proposal.

## Rules

Following are rules that territory proposals follow:

- Only one definition for a territory can be active at one time.
- To create new or update existing territories, users must use territory proposals.
- You can freely create, edit, and delete territories within a proposal without affecting active territory definitions.
- A child territory cannot cover dimension members that its ancestors do not cover. The child territory is considered invalid. Exceptions are manually included sales accounts or partners.
- The owner of a parent territory can update a proposal with changes to a subordinate's territory, provided that the owner of the parent territory has access to the proposal.
- If a given territory is updated in two different proposals, and both of them get activated, the changes of the proposal that's latest to get activated will override the changes in the other proposal.

## Statuses

A territory proposal progresses through different statuses in its life cycle.

Following are descriptions of the proposal statuses:

- **Draft:** The proposal is first created, and different users can participate to make changes to their child territories. Or, the administrator restored territories to historical definitions and the system completed adding all the required territories to the proposal.
- **Pending Activation:** The owner requests that the proposal be activated. The proposal is in pending activation status until the activation date.
- **Activated:** After the owner requested activation, the activation date is reached, and there are no invalid territories, the proposal is activated and the territories become active.
- **Processing:** Restoring a hierarchy to an historical definition starts a process to identify the changes needed in the proposal.
- **Failed:** As part of activating a proposal, territories changed within the proposal are checked to ensure that they have valid territory definitions. If any of the territories within the proposal are found to have invalid definitions or obsolete territories, the proposal is set to the Failed status. Any changes introduced to territories as part of this proposal are not made.

Users can indicate whether they want a proposed child territory owner to participate in the proposal using the publish/revoke actions. Owners of child territories can indicate if they have finished accounting for changes to their territories by submitting the proposal back. The following territory statuses indicate whether or not the proposal was shared with each territory owner:

- **Unpublished:** A territory is first created or edited within a proposal, and not published to the proposed owner for that territory.
- **Published:** The manager published the proposal to share territory changes with the proposed owner of the territory.
- **Submitted:** The proposed territory owner finishes reviewing territory changes and submits the proposal back to the manager.

## Territory Coverage: Explained

A territory coverage is a set of related dimensions that define what is included or excluded in the territory and what can be sold. For example, product and geography dimensions can be enabled to create a territory coverage for selling laptops in North America.

There are three types of coverages:

- **Regular Coverage:** The combination of one or more territory dimensions.
- **Inclusion Coverage:** A list of included sales accounts or partners. The product and channel dimensions can have specific values, and all other dimensions are ignored. The account hierarchy is ignored. The sales accounts do not have to be designated as Named accounts in Customer Center in order to be added for inclusion. Product and channel selections must fall within the jurisdiction of the parent territory.
- **Exclusion Coverage:** A list of excluded sales accounts or partners. All dimensions are ignored. The account hierarchy is ignored. The sales accounts do not have to be designated as Named accounts in Customer Center.

### Territory Coverages for Partners

A partner is an organization party with a partner profile associated and an assigned Partner usage.

Similar to direct sales, channel managers have corresponding sales territories that define their jurisdiction pertaining to sales activities. Some channel managers are assigned to specific partners. Some channel managers are assigned to manage and oversee the sales activities that involve partners. The jurisdiction of channel manager territories is typically defined by one or more of the following coverage models.

- **Coverage Defined by End Customer Characteristics**

In this coverage model, the jurisdiction of the channel manager is solely defined based on the characteristics of the end customer, irrespective of which partner is associated with the transaction. As an example, a channel manager is assigned to cover all the indirect opportunities where the end customer is located in California. You define territories for this coverage

using sales account characteristics and you can include or exclude specific sales accounts.

- **Coverage Defined by Partner Characteristics**

In this coverage model, the jurisdiction of the channel manager is defined based on some characteristics of the partner, such as where the partner is located or the type of the partner (reseller, system integrator, distributor). As an example, a channel manager is assigned to cover all the indirect opportunities where the partner is located in California.

To define this territory, you designate the coverage model to be Partner Centric instead of Sales Account Centric. In the Partner Centric model, the regular coverage is defined using the following attributes of a partner organization:

- Primary geographical location of the partner
- Organization Type of the partner (private , public , government owned, nonprofit)
- Industries served by the partner (high tech , manufacturing, banking , pharmaceutical)
- Size of the partner
- Three auxiliary dimensions defined for the partner object that are based on the customer categories classification model

The regular model can also use the Product and Sales Channel dimensions to match attributes from sales transactions (leads and opportunities).

- **Coverage Defined by Manually Included Partners**

In this coverage model, the jurisdiction of the channel manager is defined based on an explicit list of partners that are directly assigned to his territory. As an example, a channel manager is assigned to a partner named AA Solutions. This channel manager's territory should be assigned to all indirect opportunities where AA Solutions is the partner. Partners are defined in the Partner Center. You can select individual partners to include in the definition of a partner centric territory. You can also select individual partners to exclude from the partner centric territory coverage.

This jurisdiction can be additionally filtered by product and sales channel.

## **Invalid Territories: Explained**

When you create or edit a territory proposal, you can include active territories. When you activate your proposal, all territory definitions in the proposal are validated, and the proposal fails if any defined territories are invalid.

Territory deletions do not cause a failure in proposal activation. A territory added to one territory proposal, but then deleted from a second proposal that is activated, is reinstated when the first proposal is activated. If a proposal contains territories added to a parent territory that is now deleted, the new territories are deleted during proposal activation.

A territory becomes invalid if its boundaries go beyond the boundaries of its parent territory. Examples of when this may happen include:

- You remove a dimension member from the parent territory.
- You change the geography for the parent territory, and the change causes the child territory boundaries to exceed its parent boundaries.
- The administrator deletes a dimension member from the environment
- The administrator disables a dimension that is referenced by an active territory.
- The administrator moves a dimension member to a different level in the dimension hierarchy. An active territory that referenced a dimension member in the changed hierarchy no longer lies within the definition of its parent territory.
- The administrator makes a dimension member invisible that is referenced by an active territory.

### **Dimension Member Removed from the Parent**

A child territory with a dimension member that was removed from the parent territory is invalid until the dimension member is also removed from the child territory.

### **Dimension Member Changed**

A dimension member in the parent territory changes so that the child territory boundaries exceed the parent boundaries. The child territory is invalid until the dimension member is also changed for the child territory or the child territory is removed.

### **Deleted Dimension Member**

If the administrator removes a dimension member from a stage environment, then any production territory that includes the removed dimension member is invalid until the dimension member is removed from the territory.

## **Using Territory Dimensions: Examples**

The sales administrator enables only the dimensions the organization requires for defining territories. The following examples illustrate the use of different dimensions to assign sales accounts, leads, and opportunities to the correct salespeople using defined territories.

### **Geography**

For most of your sales activities, you want to assign salespeople by city and postal code.

### **Account**

You have a few key accounts that should belong to top salespeople. Use the account dimension to create territories for individual sales accounts.

### **Account Type**

You want to assign major sales accounts to Named accounts territories. A named account territory can have child territories identified by other criteria, such as

geography. You also have territories with the account type of Not Named that include no major named sales accounts in the hierarchy.

### **Customer Size**

One product line is suitable only for organizations above a certain size. Use the customer size dimension to target only the larger customers for the product line.

### **Industry**

You sell one type of service to telecommunications companies, another service to utilities, and a third service for insurance companies. You can create territories for each using the industry dimension.

### **Product**

You sell a product line that requires salespeople to have a high degree of technical knowledge. Create separate territories for this product line.

### **Sales Channel**

You delegate sales accounts that are small to partner sales organizations by geography.

## **Creating Geographic Territories: Examples**

The simplest method of dividing sales territories is by geography. Following are examples of assigning territories by geography.

### **Countries**

You have a small sales team and sell products internationally by phone. All salespeople have the expertise to sell all products to all customers. You choose to define territories by country. There are too many customers in the United States for one salesperson, so you create territories for different states that have a parent territory for the country.

### **Postal Codes**

Your company sells mostly through on-site visits to companies in a few major cities in North America and Europe. To service city customers adequately, you must assign several salespeople to each city. You choose to create territories defined by postal codes that form hierarchies with their parent territories, defined by country. Sales accounts with locations that are not within the assigned postal codes get assigned to the parent country territory.

## **Creating Territories Based on Multiple Dimensions: Examples**

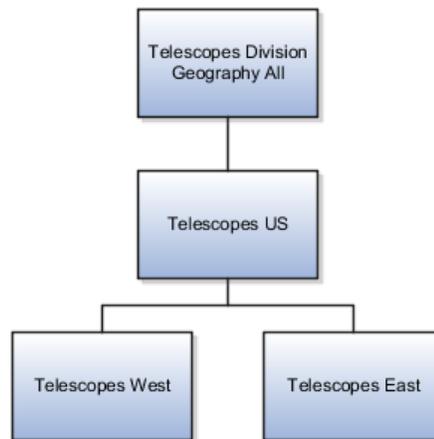
The following scenario illustrates using a combination of different dimensions to define a new hierarchy of territories.

### **Scenario**

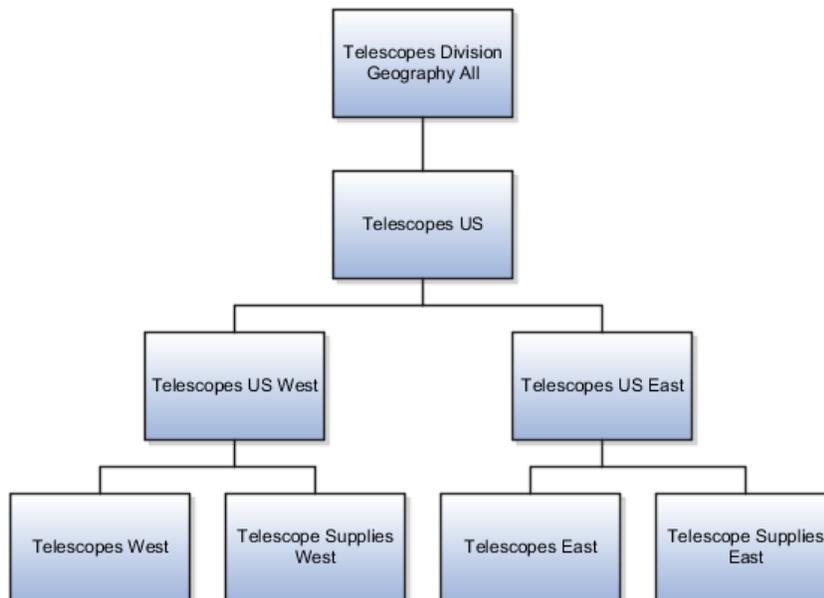
The telescope division of your company manufactures and sells a special type of microscope as well as related accessories and supplies. You currently sell mostly to medical laboratories throughout the United States, with a few sales to other industries. Your company recently started supplying microscopes to two large

universities and several colleges in the East. Management wants to focus on expanding this new market by dedicating several salespeople to this industry, and identifying universities as named accounts.

The following figure shows the current territory hierarchy for the division, divided into East and West United States with a parent territory to catch any accounts that are not identified as being within the United States. All territories for the Telescopes Division of the company include in the definition the product group: telescopes, accessories, and supplies.



Selling telescopes requires salespeople with more knowledge and experience. Therefore, you separate telescope sales from sales of accessories and supplies within each US region, as shown in the following figure. To accomplish this, you define the Telescopes territories with the telescopes product and the Telescopes Supplies territories with the Telescope Supplies and Accessories product group.



The Telescopes East territory is defined by:

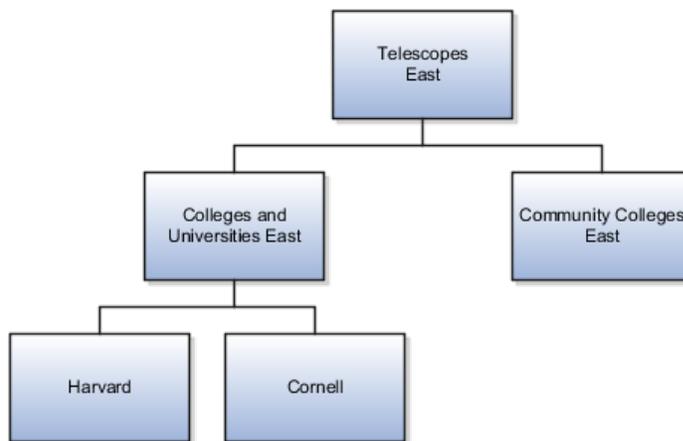
- Geography: East United States
- Product: Telescopes

- Industry: Any
- Account Type: Any

The Telescope Supplies East territory is defined by:

- Geography: East United States
- Product: Telescope Accessories and Supplies
- Industry: Any
- Account Type: Any

You add two child territories defined by Industry dimension members for 4 year colleges and universities, and 2 year colleges, as shown in the following figure. Within the 4 year colleges and universities territory, you add the two universities who are current customers as named accounts so they will have dedicated salespeople to service them.



The Colleges and Universities East territory is defined by:

- Geography: East United States
- Product: Telescopes
- Industry: Colleges and Universities - 4 year
- Account Type: Any

The Community Colleges East territory is defined by:

- Geography: East United States
- Product: Telescopes
- Industry: Community Colleges - 2 year
- Account Type: Any

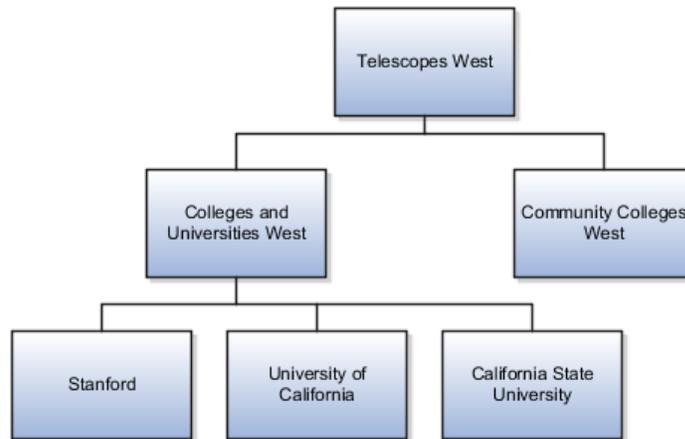
Each university named account territory is defined by:

- Geography: East United States
- Product: Telescopes
- Industry: Colleges and Universities - 4 year

- Account Type: Named
- Account: Harvard (for the Harvard territory)
- Account: Cornell (for the Cornell territory)

Additional named accounts can be added as needed.

You build the West United States territory hierarchy in the same way, as illustrated in the following figure. Sales management identified three universities as named accounts even though they have not yet purchased telescopes.



## Territory Coverage: Examples

A territory coverage is single combination of dimension values for a territory. There are three types of coverages: regular, inclusion, and exclusion coverages. A regular coverage consists of the combination of one or more territory dimensions. Individual sales accounts or partners can be selected to include or exclude from the territory in spite of the dimension selections in the regular coverage. The following scenarios illustrate when you might want to use inclusion and exclusion territory coverages.

### Scenario

Two salespeople cover all not named accounts in separate geographic areas, Texas and California. Tom owns the Texas territory, and Sue has California. Sue has a special relationship with the A1 sales account located in Texas. A1 is not a named account because it is not a strategic account, and changing it to a named account affects other sales teams and other areas in Fusion. The solution is to add A1 as a manual inclusion to Sue's territory and as a manual exclusion in Tom's territory.

### Scenario

Salespeople sell to ten to twenty individually assigned accounts. You do not define a regular coverage, but manually assign the accounts as Includes.

### Scenario

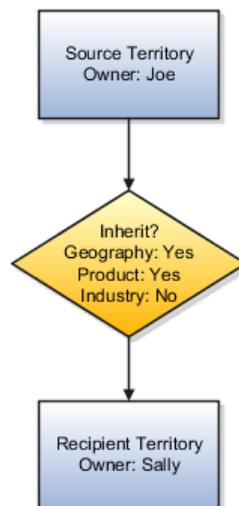
A Key Account Director is responsible for a few strategic accounts (named accounts) and all subsidiaries of the strategic accounts. You define a regular

coverage using the Account dimension to select each strategic account. You also set the Account Type dimension to Any, which means the Key Account Director sells to both named and not named subsidiaries of the strategic accounts.

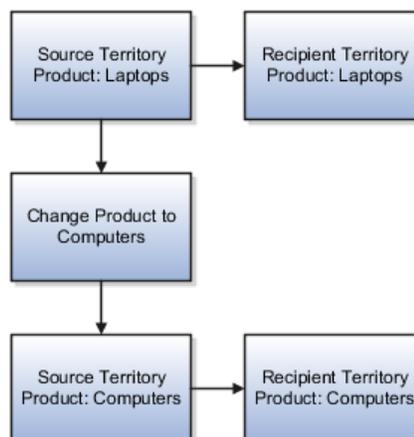
## Source and Recipient Territories: How They Work Together

Using territory inheritance reduces the effort of propagating dimension changes across many territories. One or more recipient territories inherit one or more selected dimensions from a single source territory. Any change in dimension members for the source territory pass automatically to the recipient territories, without the need to manually change the inheriting recipient territories.

The source and recipient territories can have different territory owners and can be placed in different hierarchies. In the following figure, the recipient territory inherits two of three dimensions from the source territory and has a different owner than the source territory.



Any changes made to inherited dimensions in the source territory also change in all territories that inherit from the source territory. In the following figure, the product dimension in the source territory changes from laptops to computers. The recipient territories automatically change to the product computers.



### **Source Territory**

While editing a territory in a territory proposal, you select a second territory to act as the source, select one or more dimensions to be inherited, and then activate the proposal.

### **Recipient Territory**

The recipient territory inherits only the specified dimensions from the source territory. Any changes to those dimensions in the source territory also automatically change in the recipient territory. You can change the source territory to none to end the automatic inheritance of territory definitions.

## **Territory Inheritance: Critical Choices**

You can define the boundaries of each territory individually, or you can define a territory to inherit dimension members automatically from a source territory. The source territory can be in any hierarchy. Then manual updates to the inherited dimensions need to be made only to the source territory, and the recipient territory inherits the dimension changes.

### **Inheritance**

The following points apply to the use of territory inheritance:

- All the inherited dimensions must be from the same source territory.
- You cannot have a chain of territory inheritances where territory B inherits from territory A and B also is a source territory for territory C.
- If a source territory is deleted, automated updates to recipient territories cease.
- In addition to territory member inheritances, the Eligible for Quota, Revise Quota, Revision Reason, and Revision Description in the source territory update the recipient territory.

## **Inherited Territory Dimension: Examples**

Use territory inheritance to make dimension changes to one source territory and automatically propagate those changes to recipient territories that have an inheritance relationship to the source territory.

### **Industry Inheritance**

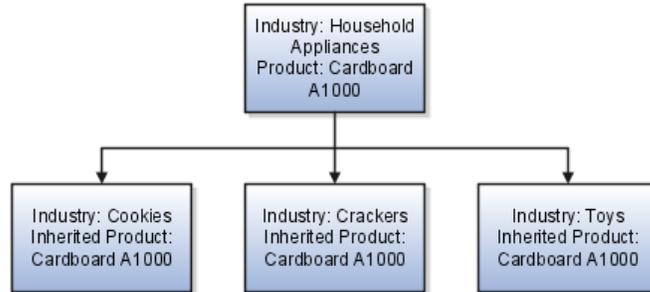
Your company sells packaging boxes to different industries that use similar boxes. You sell the following product lines:

- Cardboard boxes for manufacturers of household appliances, toys, cookies, and crackers
- Waxed boxes for beverage producers
- Fabric-covered boxes for jewelry

Different salespeople have knowledge about different industries, so you define separate territories by industry.

Your product and product line names change frequently due to manufacturing and materials changes. You have four industries that use the same cardboard box line, so you choose household appliances territory to be the source territory to update product names, and the other three industry territories inherit the product changes.

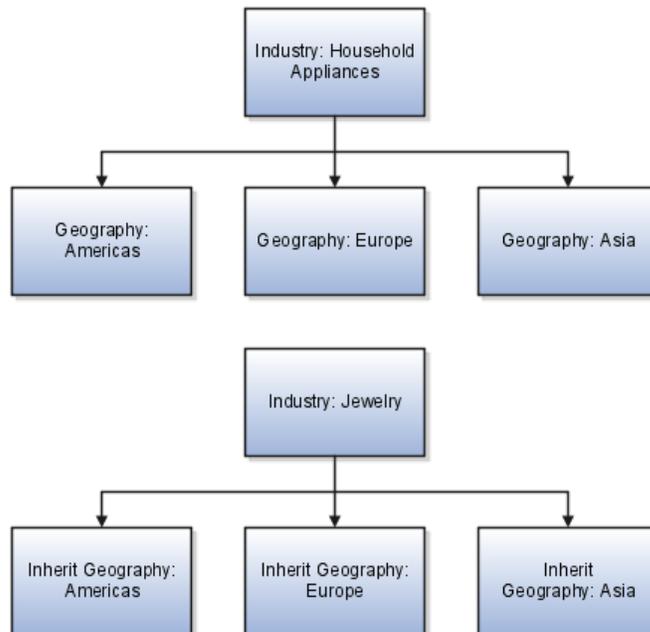
This diagram shows the household appliances industry source territory and the other industry territories inheriting the product name from the source territory.



### Geography Inheritance

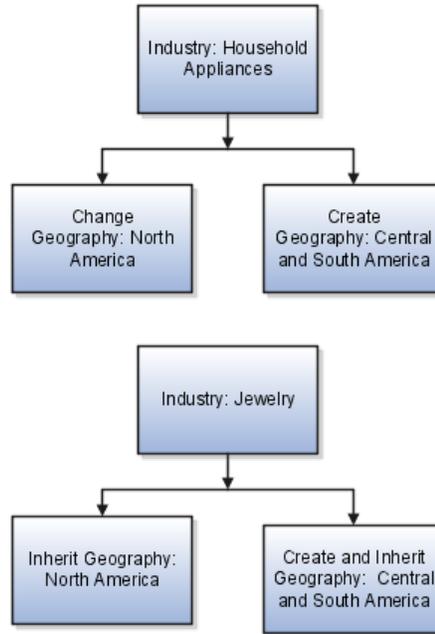
Each industry territory is broken into the exact same geographic areas, with infrequent changes. Therefore, you use the geographic territories for the household appliance industry as source territories and the geographic territories for each industry inherit from the household appliance geographies.

This graphic shows the geographic child territories of the jewelry industry territory inheriting the geography dimension members from the household appliance industry child territories.



Later in the year, your business is expanding in the Americas and it is time to split the territory into two territories. You change the Americas source territory to North America, and the Americas territories for the other industry territories

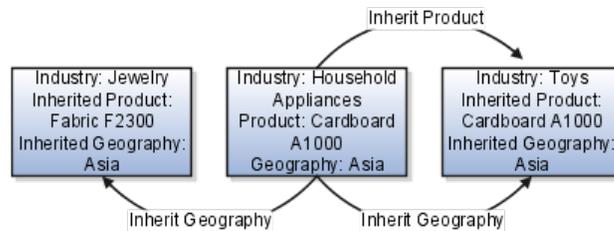
inherit the change. You then add new territories for Central and South America for each industry territory hierarchy and set the inheritance for each.



### Product and Geography Inheritance

Different territories can inherit the same or different dimensions from the same source territory.

This diagram shows both the product and the geography dimensions inheritance. The jewelry industry territories inherit only geography, and the toys industry territories inherit both geography and product.



## Use Analytics to Test Territory Proposals: Examples

View graphs to compare your proposed territory changes to existing active territories to determine if your proposal achieves the goals you set. Will the new territories be more equitable and productive? Also, evaluate territory changes in multiple proposals, or see the results of territory changes made within a single proposal.

### Scenario

You want to see how much the number of sales accounts changed between the proposed territory version with new geographic boundaries and the active

version. You select the territory and choose the Number of Customers metric for the current quarter and Version Comparison, Active Version Comparison. You see significantly more sales accounts in your proposed territory.

Next you compare all child territories of the selected territory and see that only one child has a significant change in the number of sales accounts and you determine that you need to realign the child territories.

## Restore Territories Process

Restoring territories changes territory definitions back to what they were at a certain date.

## Settings That Affect Territory Restoration

The restoration is determined by the date you select, whether historical or the current date, and your choice of restoring only selected territories or all territories.

## How Territory Restoration Is Processed

The application makes the following changes as of the selected date:

- Deleted territories are no longer deleted.
- Created territories are deleted.
- Changed territories are changed back to the prior definitions.

Your restoration selection determines what territories get restored:

- Restore Selected: Restores the selected territories and their descendant territories
- Restore All: Restores all displayed territories and their descendant territories.

If you selected the current date, then territory definitions restore to the definitions that are currently active, any changes made within the proposal get discarded, and you return to the Proposals page to again make changes. If you selected an historical date, then the proposal status changes to Processing and you return to the Manage Territory Proposals page. When the proposal processing completes, the proposal contains necessary changes to restore the selected territories.

## FAQs for Manage Sales Territories

### When does a territory administrator define territories?

Sales managers define territories because they have the knowledge about their assigned territory and about their salespeople, and are best able to assign

territories equitably. Sales managers delegate the territory definition activity to sales administrators to save time. Use security to assign specific territory hierarchy branches to your sales administrator or provide the sales administrator with access to all territories.

### **What's a metrics time period?**

Metrics values are calculated based on one or more selected time periods.

For example, if you select two different years, the revenue item metrics labeled By Close Date include all revenue items with a close date that falls within either of the two years. Metrics labeled At Period End Date calculate the amounts on the last day of the most recent selected year. Averages are calculated using all information within the two selected years.

### **What's a line of business?**

A line of business is a category for particular kinds of commercial enterprise. Modify a territory by selecting one or more lines of business for that territory. For example, during implementation a software company uses a broad categorization of products for lines of business and adds education, licenses, and consulting to their selection list for line of business.

### **How can I split a named account amongst multiple salespeople?**

You can split a named account territory amongst multiple salespeople by creating child territories with the named account territory as the parent. For example, there's a sales account hierarchy for IBM Corporation. The parent is the named account IBM Headquarters with geography defined as all. Define child territories with the same named account IBM Headquarters and with separate geographies, such as North American and EMEA. The result is that the North American child territory will cover all IBM Corporation subsidiaries in North America. Similarly, the EMEA child territory will cover all IBM Corporation subsidiaries in the EMEA region.

### **When do I restore territories?**

Use restore to undo all changes made to your territory setup after a certain date. You can undo changes made to an individual territory within a territory proposal or undo changes within territory definitions that got activated when you activated a proposal.

### **What's a territory overlap?**

When two or more territories are children of the same parent, and reference the same intersection of dimension members, then the territories overlap.

The Validate Territory window only lists overlaps where the overlapping territories are children of the same parent territory. For example, a child territory with the dimension member Virginia and a child territory with the dimension member United States overlap.

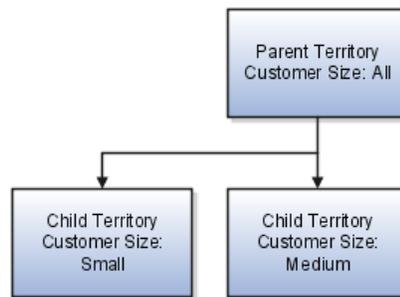
An overlap is a problem if it is accidental. If it results in two salespeople mistakenly assigned the same area, the overlap causes conflicts and incorrectly assigned sales quotas.

A deliberate overlap is useful for assigning additional salespeople or technical experts to the same areas also covered by the salespeople who have quotas. For example, the same area requires four salespeople with separate territories, but only one technical expert. It is a good practice to assign one of the territories the territory type of Overlap.

### What's a territory gap?

A territory gap consists of a dimension member that belongs to a territory but does not belong to any children of that territory.

In this graphic the parent territory is defined by the size of the customer, and the available dimension members for customer size are small, medium, and large. There are child territories for small and medium sized customers, but the territory for large customers is missing and creates a gap.



### What's an error correction proposal?

A validation routine compares changes in the stage environment with active territories and identifies problems with active territories caused by the dimension members in the stage environment. Use the generated error correction proposal to correct active territories that require changes before the stage environment can move to production.

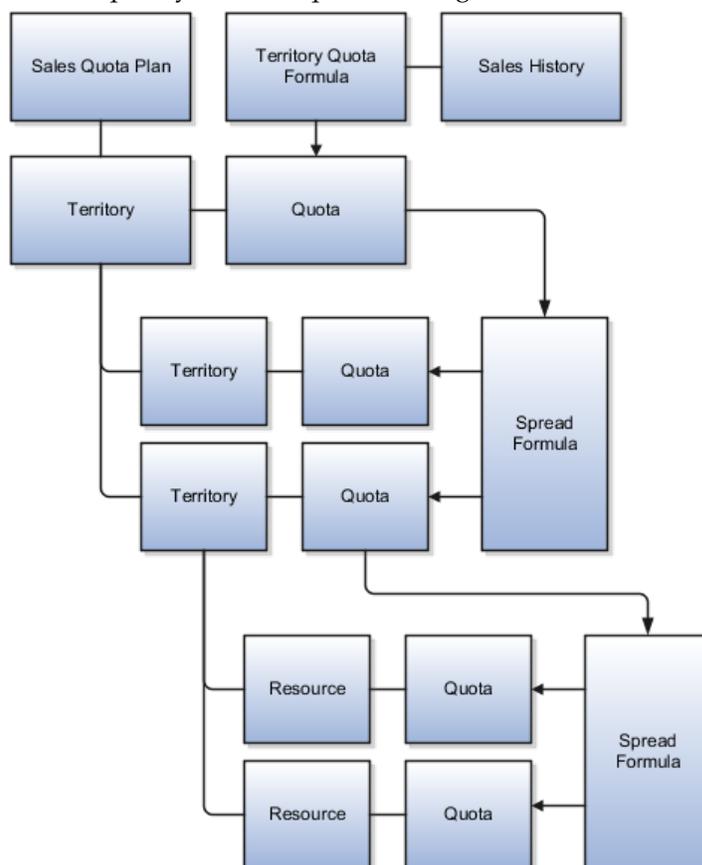
An Invalid icon appears next to every territory in the active territories list that the changes in the stage environment will make invalid. The error correction proposal owner needs to add the invalid territories to the error correction proposal and change definitions to correspond with the dimension member changes in the stage environment. For example, delete a newly disabled dimension from the territory. When the stage environment is promoted to production, the validation process is run again and if all is valid, the territories in the error correction proposal get activated.

## Manage Sales Quotas

### Sales Quota Plan Components: How They Work Together

Quotas are a reflection of sales targets set for an individual in a sales organization. After a corporate goal is established, managers distribute quotas down through the sales territory hierarchy until all territories and their respective owners have quotas. Quota predictions based on historical sales information and metrics are provided as a comparison with quotas being set. Managers use one sales quota plan for the fiscal year.

In this figure, a sales quota plan contains several territories, each assigned a quota. Territory quota formulas compute predicted quotas based on historical sales information and metrics such as forecasts and market potential. The predicted quotas appear as default territory quota amounts. Managers assign territories to individual salespeople and sales managers. Applying spread formulas quickly allocates quotas among territories or resources.



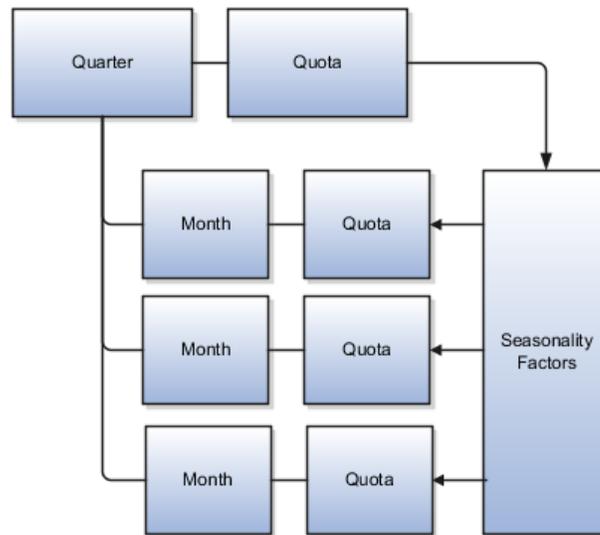
## Sales Quota Plan

A sales quota plan covers a period of one year. The administrator selects territories to include in the quota setting process, and can optionally add territory proposals to allow the setting of quotas for proposed territories.

For the sales quota plan options, the administrator selects an adjustment threshold, a territory quota formula, and a seasonality factor group to apply to all territories. Territory options override sales quota plan options. For example, the territory quota formulas and seasonality factor groups selected for individual territories override the formulas selected for all territories.

The administrator can also set a threshold percentage for adjustment amounts that managers often add to quotas.

In this figure, the assigned quota gets distributed over each month through seasonality factors that raise or lower quota amounts according to seasonal fluctuations.



## Territory Proposals

You can associate territory proposals to your sales quota plan. When sales administrators or sales managers create new proposed territories, such as for a territory realignment, they can enable the setting of quotas for the proposed territories by selecting Eligible for Quota. If you then associate the proposals to your quota plan, you see the proposed territories within the current active territory hierarchy, and salespeople will be able to assign quotas to the proposed territories.

## Territory Quota Formulas: Explained

Territory quota formulas calculate territory quota based on historical sales information and metrics such as forecasts and market potential. The calculated quotas appear as default territory quota amounts in the sales quota plan.

The formulas execute a Multidimensional Expressions (MDX) query on the territories Oracle Essbase hypercube.

Administrators can change parameters for formulas and set each formula to active or inactive.

## Predefined Formulas

Following are explanations for a few of the predefined territory quota formulas.

- Scale a measure from a past period by a percentage  
Total the amounts for a selected measure for the past selected year.  
Calculate the stated percentage of the total and add it to the total.  
For example, 110 percent of closed bookings for fiscal year 2009.
- Percentage change in a measure value over 2 consecutive periods  
Subtract the total amounts for a selected measure for one year from the total amounts for the subsequent year. Divide the difference by the total of the first year to determine the percentage of change. Calculate the percentage of the total value of the second year and add the result to the year's total.  
For example, closed bookings for 2009 minus closed bookings for 2008 divided by 2008 total gives the rate of change as 8 percent. Calculated quotas are 108 percent of the 2009 closed bookings.
- Percentage change in a measure value over 2 named time periods (current and past)  
Subtract the total amounts for a selected measure for a selected year from the total amounts for the current year. Divide the difference by the total of the earlier year to determine the percentage of change. Calculate the percentage of the total value of the current year and add the result to the year's total.  
For example, closed bookings for 2010 minus closed bookings for 2007 divided by 2007 total gives the rate of change as 7 percent. Calculated quotas are 107 percent of the 2007 closed bookings.

## Creating Formulas

Use the Essbase MDX Script Editor to create your own territory quota formulas.

For more information on MDX functions, see Oracle Essbase Technical Reference.

For more information on MDX queries, see Oracle Essbase Database Administrator's Guide.

## Published Quotas: Explained

When sales managers complete assigning quotas, they publish the quotas to the owners and resources of their child territories. The child territory owners can then view their quotas for the territories they own, and in turn assign and publish quotas to the owners and resources of their child territories. Publishing your quotas also sends notifications containing resource quota information to an incentive compensation analyst. The territory owner whose quotas are now published and the manager of the sales manager who publishes the quota receive notifications that the quotas are published.

You can select one or more territories to publish. When you publish a territory, you publish:

- The territory quotas
- The resource quotas for the selected territory
- The quotas assigned to granular time periods

Quotas in the published status cannot be changed or published again without first changing the status to not published or to pending revision.

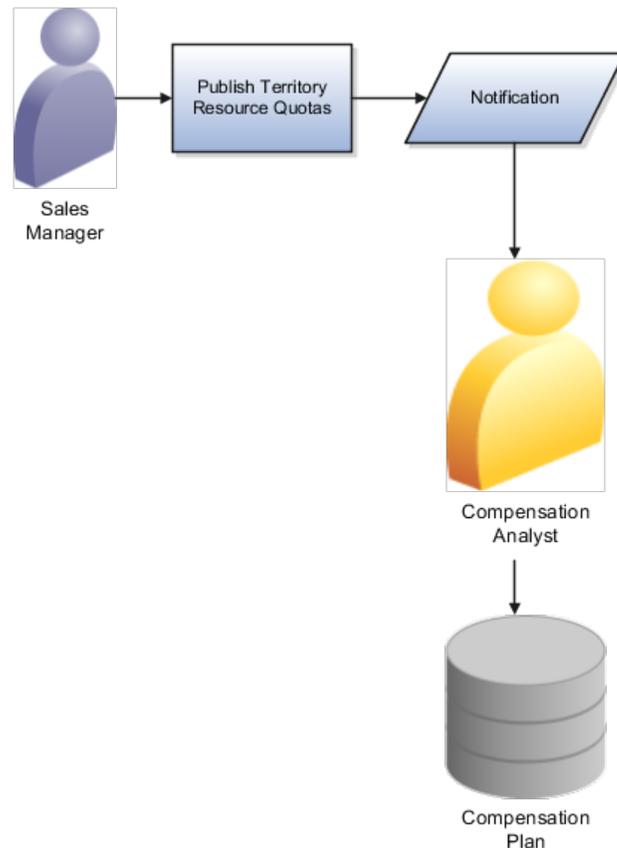
If you did not apply seasonality to quotas, then the publishing process applies the seasonality factor that was defined in the sales quota plan for the territory. If there are no seasonality factor groups defined, then seasonality factors are not applied and there is no granular time period quota.

Excluded territories cannot be published. Publishing fails if the selected territory or any territory resource has no quota.

## Resource Quota and Incentive Compensation: How They Work Together

Compensation plans control how an employee is paid. Salespeople often get paid according to their performance. One tool used to measure performance is the establishment of a sales quota for the salesperson and then the comparison of actual sales for a time period with the salesperson's quota for that time period. The system notifies the compensation analyst any time quota is published or changed.

This figure shows the sales manager publishing territory resource quotas. The publication sends a notification to the incentive compensation analyst.



## Managing Quotas

At the beginning of the year, sales management updates their territory definitions and assigns salespeople to territories. Senior managers assign quotas to their territories and child territories. The owners of those territories in turn assign quotas to the owners and resources of their child territories. When a manager publishes quotas, the quotas become available to the owners of the child territories. Also, a notification goes to the compensation analyst with the now published quota information.

During a quota plan period, changes occur in territory definitions, resource assignment to territories, and to quota assignments to resources (salespeople). Managers can choose to submit updated quota information to the compensation analyst in the form of a notification.

## Updating Compensation Plans

The compensation analyst creates compensation plans for a specific time period. The analyst uses quota notifications to keep the quota information in the plan correct and up to date. The analyst analyzes the provided information, performs any other research needed, and manually updates the quota plan or rejects the notification. The compensation plan quota status is set to complete when the compensation analyst completes updating the compensation plan.

# FAQs for Manage Sales Quotas

## What's a variance?

The variance is the difference between the adjusted quota amount for the parent territory and the rolled up total amount from the child territory quotas. The variance can be spread, meaning it gets added to the child territories.

## What's seasonality?

Annual quotas are distributed to shorter time periods, factoring in seasonal expectations in sales. This expectation is represented as a percentage factor, which reflects the share of quota for the season, or time period.

For example, your sales are typically higher the last quarter of the year and at their lowest the first quarter of the year for several of your product lines. You create the following seasonality factor group, named Retail, to automatically distribute your annual quota and factor in the seasons:

- 10 percent for the first quarter
- 25 percent for the second quarter
- 25 percent for the third quarter
- 40 percent for the fourth quarter

When you assign quota to territories that include these product lines, you apply the Retail seasonality group to correctly distribute the annual quota amounts.

### **What's an adjustment?**

An adjustment is the amount that territory owners, or a sales managers who have child territories, add to the territory quota assigned to the territory they own. The territory owner can then allocate the adjusted territory quota to child territories.

### **What's a spread formula?**

A spread formula calculates the distribution of an amount among selected child territories. For example, a spread formula takes the variance between the parent territory quota and the sum of the quotas for the child territories, and spreads it to the child territories.

The formula calculates the ratios to use for the child territories through the use of the metric defined for the selected spread formula. The formula examines each territory contribution of the metric value for a period, and compares it with the total value of the same metric for all the territories combined, to determine the percentage to apply to each territory. When a spread formula has no metric selected, then it distributes the amount evenly across the child territories.

### **What's a sales quota publish-by date?**

The publish-by date is an indication to the territory owner that sales quotas need to be published by a certain date.

The date when the owner publishes the quota is the published date.

### **What's the difference between territory and resource quota start and end dates?**

Territory quota start date and end date define a period within which the sales quota target needs to be achieved. The territory quota dates must fall within the start and end dates of the quota plan, and usually match the sales quota plan start and end dates, unless a territory is created after the start of a sales quota plan or deleted during the course of a sales quota plan.

The resource quota start and end date defines a period within which the quota needs to be achieved by the salesperson, and usually match the sales quota plan start and end dates.

Resource dates vary from the sales quota plan start and end dates when:

- A territory is deleted. All resource quotas within the territory have the same end date as the territory end date. The sales quota plan end date is not yet reached.
- A territory resource is removed from a territory, and the resource is end dated.

- Quota is assigned to a future dated resource who will join the organization in future.

### **When do I exclude a territory from quota?**

Quota is typically assigned based on revenue amounts from prime territories. When you have territories used as placeholders or for overlay purposes, these types are typically excluded from quota.

### **What's a territory administrator?**

Sales managers often choose a salesperson or other employee to assist with the quota setting process. They designate this person as a territory team member and as a territory administrator. Administrators have the same ability to assign quotas as the owner of the territory.

### **What's a resource quota target type?**

The target type often describes whether a sales resource has the prime or supplementary (or both) responsibility for sales for the territory. Target type can be either revenue or nonrevenue and is extensible.



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## Manage Sales Accounts

### Manage Sales Competitors

#### Creating Competitor Profiles: Explained

You can store various details regarding the competitors in your sales domain. As a salesperson, you can use these details when you want specific information regarding a competitor during a sales bid.

Some of the details that you can record for a competitor include:

- Stock symbol
- Company URL
- Industry
- Geography
- Threat level

The application records the following details automatically based on your sales:

- Your company's win rate against a competitor
- Revenue that your company has lost to date while competing against a competitor

#### Competitor Profile

Apart from the above basic details, the following make up a competitor's profile.

- SWOT Analysis

A method for examining the strength, weakness, opportunity, and threat (SWOT) value for a competitor. This enables you to understand, plan, and craft an effective competitive strategy when facing a competitive threat on a deal.

- Internal Experts

Resources within your organization who hold expertise on the associated competitor. Experts may also be further categorized within their

competitor association definition by associating them with specific product groups. You can leverage the knowledge of the internal experts while working on a deal.

- Product Groups

A listing of all products or product groups the competitor is associated with. In addition, you can also see the customers who are buying the associated products from the competitor.

- Opportunities

A consolidated view of past and current opportunities where the competitor was present. It gives you useful insight to plan the appropriate sales strategies.

- Industries

A listing of all industries where the competitor competes with the deploying organization.

- Geographies

A listing of all geographies where the competitor is at play.

- Attachments

View relevant documents for a competitor. You need access to a variety of competitive collateral providing information on how to position products or solutions against specific competitors. This might include industry and analyst reports about competitors as well as strategy documents for a specific industry that can benefit you in a selling situation.

- Discussions and Wiki

You can also participate in discussion forums and view wiki pages for a competitor. These avenues help you understand the competitor well and equip you with all the knowledge required to win a sales deal.

## FAQs for Manage Sales Competitors

### How can I see win/loss trends against selected competitors?

The Win Loss Trends chart displays the opportunity revenue won by your organization against competitors. The chart shows the number of wins and losses, and closed-won opportunity revenue by quarter and by competitor. The chart can also show overall opportunity won revenue and number of wins and losses regardless of whether there was a competitor on the opportunity.

### How can I get more information about a competitor?

To better understand a competitor, speak to someone who has faced a similar situation before or someone who knows the competitor well. Access a list of your colleagues from the Internal Experts tab. The list contains experts who have prior experience with the selected competitor.

## How can I view a list of opportunities that I have lost to a competitor?

View the list of opportunities from the details of the competitor record. The list is a consolidated view of past and current opportunities where the competitor is at play. It provides you useful insight to plan appropriate sales strategies.

## How can I see the win/loss reason distribution between competitors?

Use the competitor analysis graphs to see the distribution of either won or lost reasons for closed opportunities. You can get an insight into the reasons behind your organization's win-loss trends. You can further analyze the reasons for losing or winning against specific competitors. As a sales manager, you can use this analysis to improve your overall deal success rates and revenues.

# Manage Sales References

## Reference Customers: Explained

Reference customers are a valuable asset to any organization. Often, a review process is involved in enrolling satisfied customers into a reference program.

### Reference Profile

An administrator can create and update a reference profile and store the following details:

- Supported Activity Types

The reference customer profile includes a listing of various reference activity types that the customer will engage in. These activities include prospective customer visits to their site, phone calls, conference participation or subject of a case study. An activity has a threshold number such as a maximum of two site visits during a certain threshold period such as a quarter or year.

- Products

You can select from a list of products purchased by the reference customer or you can search and add products and product groups. These are products that the customer has purchased and has agreed to endorse as part of the reference program.

- Opportunities

Past and present opportunities where this reference is involved are displayed here. You can view details of each opportunity.

- Attachments

You can store case studies and data sheets about this reference and retrieve them easily. Use the content in them while working on a deal.

- Activities

Activities include appointments and tasks involving this reference customer. Appointments and tasks from related opportunities also appear here. You can create new appointments or tasks as well.

- Industries

Displays the industries that the reference customer has a business in.

- Discussions and Wiki Pages

Participate in discussion forums and view wiki pages for a reference customer. These avenues help you understand the customer and equip you with all the knowledge required to win a sales deal.

## FAQs for Manage Sales References

### What's a reference rank?

Use ranks to classify your reference customers. Ranks 1 to 5 are seeded in the application with Rank 1 being the highest. Search results are sorted in the ascending order of reference ranks. Following is a brief description of what the supplied ranks mean. You can configure them based on your requirements.

- Rank 1

Top-tier corporate reference

- Rank 2

Very strong reference with multiple products and contracts

- Rank 3

Strong regional reference for multiple products

- Rank 4

Limited-use reference based on one product or one person

- Rank 5

Likely to be referenceable upon resolution of customer issues

### How can I limit references for a customer?

Is your reference customer complaining of receiving too many reference requests? You can resolve this by setting a threshold value for a reference activity. From the Supported Activity Types tab for a reference, set a threshold number for each activity that the customer has agreed to do.

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## Maintain Customer Information

### Deliver Customer Care: Overview

The Deliver Customer Care business process covers all stages of the customer's relationship with the enterprise, from creating customer and consumer accounts to tracking their contacts. Many day-to-day activities, such as interactions, notes, tasks, and appointments are recorded and reviewed. The one business activity associated with the Deliver Customer Care business process, Maintain Customer Information, encompasses the many tasks performed by a customer service representative, salesperson, sales lead qualifier, or customer support specialist.

The tasks include:

- **Create Sales Organization:** Create import, review, and search customer accounts. Administrators can mark a customer account as a named account. This means the account is a large or important account that is assigned to its own territory and sales team.
- **Create Consumer:** Create, import, view, edit consumers for an account. Consumers are the B2C equivalent of a customer.
- **Manage Contacts:** Create, view, edit, or delete customer and consumer contact information.
- **Manage the Sales Account Team:** Designate and view salespersons, partners, and their territories.
- **Assign Sales Parties:** Designate parent and subsidiary companies of the sales organization.
- **Manage Sales Party, Partner, and Territory Assignment:** Assign resources to opportunities or leads to complete the sales process.
- **Manage Account Appointments:** Create, view, edit, or delete account appointment information.
- **Manage Account Interactions:** Create, view, edit, or delete account interaction information.
- **Manage Account Notes:** Create, view, edit, or delete account notes information.
- **Manage Account Tasks:** Create, view, edit, or delete account tasks information.
- Manage various activities, such as:
  - **Manage Classification Schemes:** Manage the categorization of customers by NAICS codes.

- **Manage Forums:** Moderate and track discussion forums.
- **Manage Named Account Setting:** Sales Administrator denotes and tracks whether a sales account is a named account.
- **Manage Organization Chart:** Create and edit organization structural diagrams.
- **Manage Reference:** Some Customers agree to act as product references. This task indicates and manages the reference customers type, for example Gold or Silver. Used to categorize the priority of the customer.

Customer Center features a tree structure with nodes that navigate you to various screens with customer information and reports. When you first select a customer to display, the default node, profile, for example, displays. The regional area displays the Customer Tree, typically containing the following nodes:

- Snapshot
- Profile
- Contacts
- Organization Chart
- Sales Account Team
- Billing Accounts
- Subsidiaries
- Classifications
- Tasks
- Interactions
- Notes
- Appointments
- Discussion Forums
- Competitive Presence
- Responses
- Contracts

To navigate to the Customer Center:

Business Process	Role	Work Area
Customer Relationship Management Application - Set Up Customer Center	Customer Relationship Management Application Administrator <hr/> <b>Note</b> Usually sets up the Customer Center for Sales and for Marketing.	<b>Set Up and Maintenance</b> For Sales, select <b>Navigator, Set Up and Maintenance, Set Up Customer Center for Sales Leads</b> For Marketing select <b>Navigator, Set Up and Maintenance, Configure Customer Center for Marketing Responses</b> For Opportunity Management select <b>Navigator, Set Up and Maintenance, Configure Customer Center for Opportunity Management</b>

Sales	Sales Administrator (Set Up and Maintenance)  Sales Manager (transaction)  Sales Representative (transaction)	<b>Set Up and Maintenance</b>  Select <b>Navigator, Set Up and Maintenance, Set Up Customer Center for Sales Leads</b>  For <b>Customer Center</b> transactions  Select <b>Navigator, Sales, Customer</b>
Lead Management	Marketing Operations Manager (Set Up and Maintenance, transactions),  Sales Lead Qualifier (transaction)	<b>Set Up and Maintenance</b>  Select <b>Navigator, Set Up and Maintenance, Configure Customer Center for Marketing Responses</b>  For <b>Customer Center</b> transactions  Select <b>Navigator, Lead Processing</b>
Opportunity Management	Sales Representative (transactions)	For <b>Customer Center</b> transactions  Select <b>Navigator, Sales, Customer</b>

## Customer Center: Explained

Oracle Fusion Customer Center enables the comprehensive management of customer information. Customer Center collects data from various systems and presents them for management in one location.

Following are some of the capabilities of Customer Center:

- Create customers and contacts
- Update customers and contacts
- Maintain customer hierarchies
- Maintain competitor information

When working with Customer Center, be aware of the following terminology used through out the application:

- Sales prospect
- Sales account
- Customer
- Consumer
- Legal entity
- Billing account

### Sales Prospect

A sales prospect is a prospective sell-to entity, or person, at an existing or potential customer used to define Leads. A prospect is the lowest level representation of a business entity that your company's marketing processes will track and act upon. The sales prospect does not have a sell-to address. You can

create a sales prospect from a party that does not have a sell-to address when you create the first lead for that party. You can also create sales prospects in Customer Center and by importing them in bulk.

You can create leads against sales prospects, but a sales prospect must be qualified and converted to a sales account before you can create opportunities for it. To qualify and convert a sales prospect, a set of business criteria or rules must be satisfied. For example, the prospect may be required to meet the criteria for account assignment.

### **Sales Account**

A sales account is a specific sell-to entity within a given customer. You can create leads and opportunities against sales accounts. A single customer might have a collection of sales accounts. To avoid confusion when assigning territories to the account, each sales account has only one sell-to address. Typically, a sales team manages a sales account. The sales team is comprised of resources assigned to the territories associated with the sales account. Additionally, a profile option determines whether a sales account is a named sales account, an existing sales account, and the account owner. Named sales accounts are typically strategic accounts assigned to dedicated territories. An existing sales account is one where there is an existing financial relationship or had previous installs. You can create sales accounts in Customer Center and by importing them in bulk.

### **Customer**

Within Customer Relations Management (CRM), sales accounts and sales prospects are collectively referred to as Customers. Additionally, a Customer also can have representations as a legal entity and a billing account that are expressed as root nodes in a hierarchy to the respective sales accounts for that customer.

View the Customer Hierarchy: A customer's hierarchy represents a holistic view of the customer's structure, showing you the customer type, the parent for the customer, the subsidiaries of the customer, as well as rolled up revenue analysis data.

### **Consumer**

A consumer is a person who is a qualified paying individual. A consumer can have one or more sales accounts or sales prospects. A consumer is not an organization sales account or sales prospect. A consumer is by definition also a legal entity.

### **Legal Entity**

A legal entity is a party that can enter into legal contracts or a business relationship, and be sued if it fails to meet contractual obligations. There are two types of legal entities: internal and external. A customer with a party usage of Legal Entity is considered an internal legal entity and is used for interdivisional selling within your own company. A customer with a party usage of External Legal Entity is any external customer who fits the definition of legal entity. Legal entities may also be used to group multiple sales accounts, sales prospects and other classes of entities or parties.

### **Billing Account**

A billing account is a party that represents the financial account transactional entity for a given Customer.

# Customer Center Trees: Explained

There are five types of Oracle Fusion Customer Center trees. Each tree displays slightly different nodes, and the information that you are able to view and edit on each node depends upon your security privileges and your membership status on the sales account team

The five types of Customer Center trees are:

- Customer
- Consumer
- Contact
- Legal Entity
- Account Plan

## Customer Tree

The customer tree displays nodes for business-to-business entities such as sales account and sales prospect. If you are a member of the sales account team with at least Edit level access or you have the Sales Party Administration duty, you can update information on the following nodes: contacts, organization chart, classifications, assessments, discussion forums, classifications, assessments, notes and, account assessments. Only those users with Sales Party Administration duty or Full level access on the sales account team and profile nodes can update the members of the sales account team

## Consumer Tree

The consumer tree displays nodes for business-to-consumer entities such as sales accounts and sales prospects. All nodes on the consumer tree are visible to all users. Since consumers are individuals rather than organizations, there are fewer nodes displayed in the consumer tree than in the customer tree. For example, you will not see nodes for organization chart, contacts, assessments, or others that are pertinent to organizations.

## Contact Tree

The contact tree displays nodes for contacts with the contact profile and other related information such as the customer (the organization) to whom the contact belongs, interactions with the contact, notes, and so on. All nodes on the contract tree are visible to all users.

## Legal Entity Tree

The legal entity tree displays nodes for business-to-business entities that are marked with a party usage of Legal Entity. Because legal entities are typically a parent or root node in a customer hierarchy, legal entity tree has a subsidiaries node. All nodes on the legal entity tree are visible to all users.

## Account Plan Tree

An account plan is a plan to sell to a certain set of accounts in a coordinated way. There is a specific set of assigned resources. This tree shows associated contacts, assets, Opportunities and member accounts of the plan.

## Manage Customer Center Trees: Explained

Customer center tree is a navigation paradigm which enables quick and easy access to various related information in one central place. Seen on the regional area of the page, the tree is made up of object nodes such as Profile or Contacts. These object nodes can be categorized into logical categories. Categories enable you to organize those object nodes to fit your needs, for example, the Sales category or Service category. Each implementation can customize the Customer Center tree by showing or hiding the various nodes as required, and configuring node names and other parameters. When saved, the personalizations for this view of the tree are kept for all users of the application. Individual users will have capability to further personalize the tree as desired.

### Managing Customer Center Trees

Set these attributes for each node in the Customer Center Tree:

- Name - the name shown in the customer center tree UI.
- Visible - indicates whether the node will be visible in the customer center tree.

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### Important

All tree nodes that render portlets are delivered with the Visible check box unselected. To show the portlet, select the Visible check box.

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- Default - the node shown when a user drills down into the customer center tree.
- Portlet - indicates whether the node is a portlet or a local task flow. A portlet is a non-local task flow residing in another business process. For example, when accessing the Opportunities node in the Lead Management application, the Opportunities node is a portlet because the Opportunities task flow resides in the Sales applications, outside of the local Lead Management application. Each Fusion application using Customer Center is delivered with the appropriate portal information already configured and should not be changed. All tree nodes that render portlets have the 'Visible' flag turned off. If the portlet is required to be visible, the 'Visible' flag needs to be changed to show the node.
- Parameters - specify input variables and values for the node. There are only three nodes that require parameters. These nodes are specifically for third-party integration: OneSource Profile, Service Requests, and Snapshot:
  - **OneSource Profile parameters:** `token=#{'{OneSource token}'}`

Replace `{OneSource token}` with your OneSource access token. For example, if your OneSource token is `'token'`, set the OneSource Profile parameter as: `token=#{'token'}`. Or, if you do not require a token to access OneSource, simply replace `{OneSource token}` with `NULL`; set the OneSource Profile parameter as: `Token=#{''}`

- **Service Requests parameters:** `HostName=#{'Siebel server path'};SSLEnabled=#{'[true|false]'};UserName=#{'{username}'};Password=#{'{password}'};SystemName=#{'{reference system name}'}`

1. Set host name to be your Siebel server path, for example,  
`HostName=#{'hostname.siebel.com/ CALLCENTER_enu/start.swe'}`
2. Set SSLEnabled to true or false, for example, `SSLEnabled=#{'false'}`.
3. Set UserName to be your Siebel system login, for example,  
`UserName=#{'USER'}`.
4. Set Password to be your Siebel system password, for example,  
`Password=#{'PWD'}`.
5. Set System Name to be your source system name as defined in the Original System References mapping table, for example, `SystemName=#{'SIEBEL'}`. The default value is 'SIEBEL' if this parameter is not specified.

Example Service Requests parameter:

```
HostName=#{'hostname.siebel.com/CALLCENTER_enu/
start.swe'};SSLEnabled=#{'false'};UserName=#{'USER'};Password=#{'PWD'};System
Name=#{'SIEBEL'}
```

- **Snapshot node parameter:** `HostName=#{'Siebel server path'};SSLEnabled=#{'[true|false]'};UserName=#{'{username}'};Password=#{'{password}'};SystemName=#{'{reference system name}'}`

The Snapshot node parameter is the same as the Service Requests node and thus needs the same parameters as those for the Service Requests node.

## Sales Account Team Member Access Level: Explained

There are three types of sales account team memberships known as access levels.

These access levels control the team member's privileges for the sales account:

- View Only
- Edit
- Full

When a resource is initially added to the sales account team, a profile option setting determines the member's default access level. If that member is removed from the sales account resource team, she no longer has access to the sales account, unless she is still a member of a territory that is assigned to the sales account. Resources in the management hierarchy of a newly added team member inherit the same access level of the subordinates.

### View Only

View Only is the minimum level assigned to a sales account team member. This access level enables the team member to view the contents of the sales account

child attributes such as sales account team, snapshot, assessments, discussion forums, notes, interactions, appointments, and tasks. This assumes, however, that the team member also has functional access to view that child attribute. If the team member's resource role does not provide functional access to view a particular child attribute of a sales account, that member cannot view the attribute, regardless of her sales account team access level. A team member with View Only access level for a sales account can view only the opportunities, leads, and revenue lines to which she has relevant data privileges.

### **Edit**

Sales account team members with the Edit access level can view and edit all customer-related objects. They can view and edit only the opportunities, leads, and revenue lines to which they have the relevant data privileges. The Edit access level provides a sales account team member with the ability to run the territory reassignment process, but she cannot change the composition of the sales account resource team.

### **Full**

The Full access level allows team members to do everything that the Edit access level allows, with the addition of being able to change the composition of the sales account resource team. A team member with Full access can manually add and remove team members, change a member's access level, and mark the lock assignment setting for team members. When a sales account is created, only the sales account owner and sales administrators are granted the Full access level, but they can grant Full access to other team members.

## **Sales Account Territory Member Access: Explained**

Access for the Territory owners and members parallels that of the Sales Team members.

These access levels control the internal and partner territories privileges for the sales account:

- Internal territory owner: Full access
- Internal territory members (non-owner): Edit access
- Partner territory owner and members: View-only access

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### **Note**

Territory Management must be implemented to utilize this feature.

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## **Third-Party Integrations in Customer Center: Explained**

Oracle Fusion Customer Center is a central location to access a comprehensive and multifaceted view of customer information. It unifies Fusion applications data as well as relevant third-party content.

### **Third-Party Integrations in Customer Center**

OneSource and Siebel Service are two third-party integrations readily configured in Customer Center. This topic explains how third-party customer content is mapped to Fusion customer.

- **OneSource to Fusion Mapping**

OneSource, an online source of business and company data, can be accessed directly from the OneSource node in Customer Center.

Customer Center conducts searches for OneSource company data in the following order:

- a. Look up based on mappings defined in `HZ_ORIG_SYS_REFERENCES` table where `orig_system` is `ONESOURCE`.
- b. Look up based on Fusion customer stock symbol. This is checked if mapping is not found in `HZ_ORG_SYS_REFERENCES`.
- c. Look up based on Fusion customer name. This is checked if mapping is not found by stock symbol lookup. If there are multiple OneSource companies match the Fusion customer name, user can choose from the list of matching OneSource companies.

- **Siebel Service to Fusion Mapping**

Mappings for Siebel accounts to Fusion customers are maintained in the `HZ_ORIG_SYS_REFERENCES` table, where `orig_system` is `SIEBEL`.

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**Note**

Customer Center does not include licenses for OneSource and Siebel applications. Third-party application licenses may be acquired separately. If you want to enable OneSource and you have a web proxy for external HTTP(S) traffic, you must select Enable Web Proxy on the Web Proxy Configuration screen and specify your web proxy configuration.

**See Also:** "Web Proxy Configuration" in the chapter "Creating a New Provisioning Plan" of the Oracle Fusion Applications Installation Guide

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## Sales Account Assignment Object: Explained

Territory-based assignment is based on intelligent mapping of sales account assignment object attributes and sales territory dimensions. The Sales Account Assignment object is used by Assignment Manager to identify the sales accounts and then determine which territories to assign. The table below lists sales account assignment object attributes and corresponding customer attributes as shown in Customer Center Profile and Classification nodes. See Configuring Assignment Manager: Critical Choices for more information about the assignment process.

Sales Account Assignment Object Attribute	Corresponding Customer Center Attribute
Geography ID	Sell-to Address
Industry	Primary Industry: the primary classification code for the classification category defined in profile option Industry Classification Category.
Organization Type	Primary Organization Type: the primary classification code for the classification category Organization Type defined in profile option Industry Classification Category.
Customer Size	Customer Size

Named Account Type	Named Sales Account Indicator
Party ID	Party ID
Auxiliary Dimension 1	the primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 1.
Auxiliary Dimension 2	the primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 2.
Auxiliary Dimension 3	the primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 3.

## Scheduling Sales Account Assignment: Explained

The Sales Account assignments process can be scheduled and run on the Scheduled Process page. You need to have the 'Run Sales Party Batch Assignment' privilege to be able to define and run sales account batch assignment.

To access the Scheduled Process page, start on the Fusion Home page and click **Navigator**. Under the **Tools** heading, click **Scheduled Processes**.

1. Click **Schedule New Process** then click type **Job**. Choose the process named **SalesAccountBatchAssignRequest**. If needed, use the Search link at the bottom of the Search window.
2. Enter your process details. The following table shows the view criteria and its description, as well as any bind values that are required.
  - **Work Object code:** Sales\_Account\_Work\_Object
  - **Candidate Object Code:** SalesAccountTerritory\_Candidate\_Object
  - **Assignment Mode:** Territory
  - **View Criteria Name:** (see table below)
  - **View Criteria Bind Values:** (see table below)

View Criteria Name	View Criteria Description	View Criteria Bind Values
SalesAccountsUpdatedSin	Use this view criteria to assign sales accounts which have not been previously assigned and have <code>LAST_UPDATE_DATE</code> (in the <code>ZCA_SALES_ACCOUNTS</code> table) greater than the specified date. For newly created sales accounts, <code>LAST_UPDATE_DATE</code> is the same as the creation date.	BindLastUpdateDate=[YYYY-MM-DD HH:MM:SS]

SalesAccountsAssignedBe	Use this view criteria to reassign sales accounts which have been previously assigned and have LAST_ASSIGNED_DATE (in the ZCA_SALES_ACCOUNTS table) less than the specified date.	BindLastAssignedDate=[YYYY-MM-DD]
SalesAccountTerritoryBatc	Use this view criteria to reassign sales accounts impacted by the specified territory and territory dimensional realignment batch.  This view criteria is also used internally to invoke immediate/automatic assignments after territory proposal activation and territory dimension updates.	BindReassignmentBatchId=[Territory Reassignment Batch ID]
SalesAccountBulkImportV	Use this view criteria to assign sales accounts created in a given customer import batch.  This view criteria is also used internally to invoke immediate/automatic assignments after customer import.	BindReassignmentBatchId=[Import Activity ID]
SalesAccountDimsForPart	Use this view criteria to assign the sales account with the specified sales account ID.	BindPartyId=[Sales Account ID]

3. Define a schedule as needed using the Advanced button on the Process Details page. You can schedule the process to run as soon as possible, or to run at a given frequency and start date.
4. Submit your job and monitor it using the Scheduled Processes list, refreshing it to view the latest status updates.

## Managing Contact Preference Information: Explained

Managing contact preference information includes creating and editing preferences about contact permissions and restrictions.

### Creating Contact Preference information

You create contact preference information from the Oracle Fusion Customer Center application. When you are viewing Address or Contact Point information

for a customer or contact, you can select a specific address or contact point, and choose Manage Contact Preferences from the Action menu. You capture whether there is a restriction (Do not) or permission (Do) in the Preference attribute, and a Reason Code for such preference. You record a specific start date and can set an end date for the preference. The application is delivered with the start date set to the current date, and the end date to null.

### **Reviewing Contact Preference Information**

On seeing the Do Not Contact icon, you must review contact preference information for restrictions before taking any action. You can review the contact restriction information by clicking either on the Do Not Contact icon or on the appropriate option from the action menu. Note that do not contact entries are made against each phone, E-mail, and address and not at the organization or person level. If restrictions are present for a phone number, the click-to-dial action is disabled.

### **Privileges Required for Managing Contact Restriction Information**

Contact restriction information, such as opting in or out of the Public Do Not Call Registry, is captured as a Reason Code. Regular business users, such as sales representatives and managers, can create and edit contact preference information with any Reason Code that is not identified as Legal. However, to be able to create and edit contact restriction information using a Reason Code that is tagged as Legal, you require the Legal Contact Preferences Management duty role. This duty role is available only to the users with application administrator roles, such as, a Sales Administrator.

A Reason Code can be setup as Legal by tagging the Reason Code lookup value in the lookup type REASON\_CODE with the value LEGAL using Manage Trading Community Common Lookups task.

## **FAQs for Maintain Customer Information**

### **How can I add territories to a sales account?**

Assignment Manager (part of Oracle Fusion Work Management) is used to determine matching territories for a given sales account. A sales account can also be assigned to one or more internal and partner territories.

All internal territories, such as Prime, Overlay and Sales Channel Manager territories, which match a given sales account's assignment attributes are assigned to the sales account. Internal territory assignment can be run immediately and automatically whenever sales account assignment or reassignment is required. For example, you can run assignment manager when a sales account is created or updated, or when territories are realigned. Internal territory assignment can also be scheduled to run in a batch, or it can be run on-demand via the Assign Territories action in the sales account team page.

Partner territories are applicable to Partner Relationship Management implementations. When a partner lead is approved, any partner territories

associated to the lead are automatically assigned to the lead's sales account. Channel sales manager can also select specific partner territories to assign to a sales account via the Add Partner Territories action in the sales account team page.

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**Note**

Territory Management must be implemented to utilize this feature.

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**How can I make merge requests?**

A merge request is made when duplicate records that point to the same customer are found, and you want to consolidate those records into one. When a merge request is approved, there is one survivor record. All other duplicate records are considered victims, and they are marked with the status of Merged. In customer center, you can mark two or more customer records for merge request from customer list in the Customer home page or in the customer search result. Merge requests will be processed by the customer data hub. The customer data hub must be implemented and the profile option Merge Request Enabled set to `YES` for this feature to be available.

**How can I personalize the customer center tree?**

Personalizing the Oracle Fusion Customer Center tree enables you to have a more intuitive navigation experience. The tree, located in the regional area of the page, is made up of object nodes such as Profile or Contacts. To personalize the tree, use the Action menu located directly above the tree or right click on any tree node, and click Manage Customer Tree in the menu popup. The Manage Customer Tree window will pop up. Select the node you wish to modify. You can change the name, whether the node is visible or not and if it should be the default node that will display upon opening the tree. When you save, the customization will be associated to your user name.

**What's the difference between an internal territory and a partner territory?**

An internal, or deploying company, territory is defined, created, and assigned internal resources.

Examples of two internal territories are:

- Sales Representative Territory (SRT) is the jurisdiction of responsibility of a sales representative over a set of sales accounts, leads and opportunities.
- Lead Triage Territory (LTT) is the jurisdiction of responsibility of channel manager to triage partner Leads, that is approve leads and route to the right Partner.

A Partner territory is the jurisdiction of the reselling partner and contains partner resources. Specific Partner territories can be assigned to a sales account as needed.

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**Note**

Territory Management must be implemented to utilize this feature.

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**When do territories get assigned to sales accounts?**

Internal territories get assigned to sales accounts in the following scenarios.

- When sales accounts are created.
- When a sell-to address is added to an existing sales party.
- When sales accounts are imported in bulk.
- When certain attributes on sales accounts that correspond with territory assignment dimensions are updated.
- When batch assignment is run.
- When you select the Assign Territories menu action on the Sales Account Team node for the sales account
- When territories are realigned or when personnel leave the territory or the company.

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**Note**

The following profile options determine whether territory assignment and reassignment is automatic for sales accounts. The default setting for both is YES.

- Sales Account Automatic Assignment on Create Enabled
- Sales Account Automatic Assignment on Update Enabled

Automatic assignments are always enabled following an import, party merge and territory realignment.

During initial implementation and migration, it is possible to create sales accounts before territories have been set up in the system. These sales accounts will not receive any territory assignment because there are no territories. These accounts need to be explicitly assigned when territories are configured and activated in the system. This is one exception which does not have immediate/automatic assignment. The recommendation is to run a batch assignment to assign these sales accounts created at the beginning of the implementation using the view criteria `SalesAccountsUpdatedSinceVC`.

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Partner territories get assigned to sales accounts in the following scenarios.

- When a partner-generated lead is approved, all partner territories associated to the partner-generated lead are automatically assigned to the sales account.
- Users with the privilege Manage Sales Party Partner Territory can assign partner territories from the sales account team UI.

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**Note**

Territory Management must be implemented to utilize this feature.

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## Pursue Leads and Opportunities

### Follow Up Leads

#### How Lead Components Fit Together

A lead follows a path which ends either with converting the lead to an opportunity, or retiring the lead when no possibility exists of converting the lead to a sales opportunity. The lead lifecycle includes an automated process to first capture the leads, then prioritize the leads for sales engagement through a scoring and ranking process. Leads are then distributed to appropriate sales resources for further lead qualification, follow-up and conversion.

##### Leads Lifecycle

Leads are monitored, reassigned as appropriate and the lead quality is continuously reviewed and adjusted as the lead progresses through its lifecycle. Marketing and Sales departments both share the ownership of leads, where the focus on the leads shifts from Marketing to Sales and back to Marketing based on the lead status. The lead lifecycle is captured in the following topics:

- Lead Generation
- Lead Qualification
- Lead Distribution
- Lead Assessment
- Lead Conversion

##### Lead Generation

Leads are generated and captured from many different sources such as:

- Campaign responses
- Campaign stages handled by telemarketing
- Third-party lead sources
- Sales prediction application through the creation of new leads

Flexible lead import, customer and contact creation, and de-duplication ensure marketing lead generation efforts are optimized. For example, the lead import process checks whether leads represent new or existing customers. For new customers, data needs to be created for the lead. If the lead is an existing customer, part of the lead import process checks to ensure customer and lead information is not duplicated.

##### Lead Qualification

Marketing departments help with the lead qualification process to ensure that only qualified leads are handed over to sales. Leads are typically ranked as

Hot, Warm, or Cool. Leads are further qualified by the use of company specific standard questions to score a lead. Lead scores are numeric values typically ranging from 1 to 100, where a high score represents high quality.

It is not good practice to let stale leads build up. Standardized criteria for lead qualification ensure that quality leads reach the salesperson and help maximize the conversion rate from leads to opportunities. For example, your organization has criteria and processes for ensuring that leads are either developed or retired within 30 days. When the lead age is greater than 30 days and the rank is A or B, Marketing reassigns the leads for follow-up by an internal telemarketing group. If the leads cannot be qualified or further developed to revenue opportunities, the rejected leads can be reassigned or can be retired manually.

### **Lead Distribution**

As the qualification of leads progresses into real potential prospects, assignment manager uses expression-based rules to associate one or more internal salespersons with each lead. If the lead is associated with an existing Sales Account, then assignment manager uses territory definitions to associate (typically one) internal territory with each lead. The salesperson newly assigned to the lead may be related to the lead record directly through the lead team or indirectly through a territory associated with the lead. They can view and update those leads to which they are assigned in the lead work area and can claim ownership of the lead by using the Accept Lead action.

Other assigned resources can view and update the lead, but cannot make themselves the owner. As the lead is qualified further, for example, if a sales prospect changes to a sales account by adding an address, assignment manager is automatically invoked during the next automated assignment cycle. Depending on the assignment logic, the lead may be reassigned to a different territory or sales resource. If the assigned salesperson takes no action on a lead for several days, then the lead can be manually reassigned to another salesperson.

### **Lead Assessment**

The salesperson must evaluate the quality of information they have received for the lead. They determine if the details are sufficient to reach out to the customer and assess whether a lead is worth pursuing with the help of preconfigured assessment templates. Assessment templates can further qualify the lead by:

- Reviewing the content shared with the customer during a campaign
- Framing the lead in the context of the campaign
- Ensuring the salesperson understands the information that has already been sent to the customer

Lead Assessment enables leads to be further assessed through predefined questions that help determine the likelihood of the lead being accepted by Sales. In this scenario, a salesperson named Mike begins asking the customer a series of questions created by Marketing and Sales to assess the quality of the lead. As each question is asked, Mike records the answer and the lead assessment tool automatically factors the answer into the assessment score of the lead. At the end of the call, Mike notes that the assessment lead score is high. He requests the lead be assigned to the direct sales team for that customer. If the lead score was low, then Mike could retire the lead, or if the lead needed further qualifying, he could leave it in his list of leads for follow-up at a later date. If the lead is good, but the potential revenue opportunity is less than a predetermined monetary amount,

for example, twenty-five thousand dollars, then Mike can convert the lead to an opportunity that he works himself.

### Lead Conversion

A lead's life cycle ends either when a lead is converted to a sales opportunity, or when the lead is retired. Conversion to an opportunity stage allows the salesperson to pursue the account in the sales cycle. After establishing that the lead has potential, the salesperson converts the lead to an opportunity. Contact is established and meetings and presentations are scheduled to move the opportunity along the sales pipeline. To track the progress, contact notes are captured as interactions and associated with the contact and opportunity.

As the lead progresses through its life cycle, decisions to retire the lead are based on the following.

- You cannot verify customer and lead details
- The customer is not interested in pursuing the lead any further

## Lead Actions: Explained

Use the lead actions to manage the lead.

Lead actions are generally grouped into the following categories:

- Standard create, edit, delete, and export functions
- Ranking, scoring, and qualifying actions to assist in prioritizing leads
- Accepting, rejecting, reassigning, and retiring actions to ensure leads are in the right queue for pursuing
- Converting leads to opportunities to continue sales pursuits and include in sales forecasting

The ability to perform each action is dependent on the privileges assigned to your role, your access level as a lead sales team member, and the current status of the lead.

### Lead Actions

The following table describes the lead actions that are distinctive to the lead.

Action	Description
Rank	Submits the Request Sales Lead Assignments process to automatically assign a lead rank value based on the predefined rules that are grouped and specified on the Assignment Rule for Ranking Leads profile option. A rank represents the priority of the lead, such as Hot, Medium, and Cool.
Score	Submits the Request Sales Lead Assignments process to automatically assign a lead score value based on the predefined rules that are grouped and specified on the Assignment Rule for Scoring Leads profile option. Different from the qualification and assessment scores, this score value can be used as a source for predefined rules for the automated assignment of lead rank, qualification status, territories, and resources. The assignment of these other objects are separate actions.
Qualify	Updates the lead status to Qualified, by-passing the automated sales lead classification process.

Reassign	<p>Provides two choices for when the sales lead assignment process will evaluate the lead to automatically reassign sales team members and territories to the lead:</p> <ul style="list-style-type: none"> <li>• Automatic assignment</li> </ul> <p>The lead is eligible for reassignment when the next scheduled Sales Lead Processing Activity submits the Request Sales Lead Assignments process and the lead meets the processing activity's selection criteria.</p> <ul style="list-style-type: none"> <li>• Immediate automatic assignment</li> </ul> <p>The Request Sales Lead Assignments process is immediately submitted to re-evaluate the lead.</p> <p>The manual assignment option updates the lead owner to the specific resource selected from a list. The Reassign action is available for leads with a status of Qualified or Unqualified.</p>
Retire	<p>Updates the lead status to a retired lead indicating the lead is no longer one that needs pursuing.</p>
Reject	<p>Removes you as the lead owner. The accepted indicator and assignment status are also updated to reflect that the lead is no longer accepted. The lead is eligible for reassignment when the next scheduled Sales Lead Processing Activity submits the Request Sales Lead Assignments process and the lead meets the processing activity's selection criteria, excluding the last lead owner when assigning new team resources.</p> <p>The reject reason and number of times the lead is rejected are available for searching leads and is displayed in the Overview page for analysis and possible indicators that the lead should be retired.</p>
Accept Lead	<p>Updates the lead with you as the owner. The Request Sales Lead Assignments process is submitted to automatically assign sales team territories and resources based on the predefined rules that are grouped and specified on the Assignment Rule for Ranking Leads profile option.</p>
Convert To Opportunity	<p>Creates an opportunity based on lead information. The lead status is updated to converted.</p>

## Lead Statuses: Explained

The status of a lead is primarily determined by a user performing an action on a lead, or upon successful completion of the lead qualification activity.

Once leads have been assigned to lead qualifiers or related sales roles, lead follow-up activities begin. As specific actions are performed on a lead, the status of the lead changes accordingly.

## Lead Status

The following table describes the status of leads:

Status	Description
Unqualified	A lead with a status of unqualified signifies that the lead requires additional information and qualification activities by the lead team. This is the default status assigned to all new leads.
Qualified	A qualified lead signifies that the lead is ready for sales attention. The status can be updated to qualified by either the user selecting the Qualify action or upon successful completion of the qualification processing activity. Leads can have a status of qualified based on many factors including the status of the budget and the time frame of the project.
Converted	When a lead is converted to an opportunity, then the status is set to Converted.
Retired	<p>The status of a lead is updated to Retired when a user selects the Retire action. A lead is retired when there is no likelihood of the lead being converted to an opportunity or when a lead is no longer followed up by Sales and not evaluated by Marketing over a certain period of time.</p> <p>A retired lead cannot be converted to an opportunity. Marketing users can review retired leads and then delete them as required.</p>

## Lead Qualification: Explained

Qualifying leads is an important first step in bringing the sales lead to a conclusion. At the end of the lead qualification process, the lead can either be classified as a qualified lead which is ready for conversion to an opportunity, or can be retired if purchase interest for the lead cannot be validated. Lead qualification process can either be performed by internal marketing or internal sales groups.

What constitutes a qualified lead varies from company to company.

### Basic Lead Qualification

In some companies, the basic lead qualification data, including customer budget status and time frame, gathered by lead qualifiers is considered in the scheduled automated process that determines the lead qualification status value based on rules.

### Additional Lead Qualification

In other companies, a lead qualification questionnaire score is a factor used by the lead qualifier or salesperson to decide to manually set the lead to a Qualified status using the lead actions menu. Your application administrator assigns the questionnaire to your Lead Qualification Template profile. The answers entered

are assessed using a weighted scoring model with instant feedback available via a status bar.

## Qualifying Leads: Examples

The lead qualification process is an important first step in bringing the lead to a conclusion. At the end of this process, the lead can be classified as a qualified lead which is ready for conversion to a sale, or can be retired if purchase interest for the lead cannot be validated. The lead qualification process can either be performed by internal marketing, internal sales groups, or external third-parties.

Lead quality is assessed as soon as a lead is generated. Lead quality of a newly created lead is mainly determined based on the characteristics of the customer contact on the lead, the type of response which caused the lead to get generated, and the nature of the campaign. As leads are enriched further, typically by means of pre-qualification telemarketing activities, lead quality is assessed again based on the added qualification data such as customer need, urgency or time frame for the project, and whether the customer has set aside budget for this product. The following scenarios illustrate some of the lead qualification processes:

### Rule-Based Lead Qualification

Rule-based leads qualification process requires that the value of the Lead Status attribute be set to Qualified if qualification rules evaluate to a positive answer. For example, consider the rule:

```
IF budget status is approved AND timeframe is 3 months AND decision maker has been identified AND response type is attended event THEN rule is passed ELSE rule is failed.
```

If this rule evaluates to TRUE, the value of Lead Status should be set to Qualified.

### Internal Marketing Qualification

Internal lead qualifiers or inside salespersons conduct phone conversations to gather qualification data about leads. Qualification templates are used to define consistent and specific qualification criteria for similar leads. These qualification questions are tailored to specific product, industry, and source of the lead.

Before updating the lead status to qualified, the lead must have a valid primary product associated with it. Users can select multiple leads and choose the qualify action. Leads meeting the requirements for lead qualification are processed.

As the qualification data is gathered using the leads management user interface, the lead qualifier or salesperson can decide to manually set the lead to Qualified status. In some companies, the lead qualification data gathered by lead qualifiers is considered in the scheduled automated process that calculates lead score or lead rank as well as assigning sales team territories. For such companies, a simple rule to move leads to a Qualified status when the lead score reaches a specific threshold is sufficient.

A lead can be qualified when the basic attributes of the lead indicate interest in the purchase of a product. For example, basic attributes might include:

- Contact attended a product event

- Budget is approved
- Purchase time frame is less than a year

Additional qualification provides the Qualification template with questions where you can enter the answers on the same page. Most of the data needed to qualify the lead is available in the Lead Qualification tab, and the supporting data is included in the Contextual area for easy reference.

### **Internal Sales Group Qualification**

Leads are generated and captured from many different sources including the sales prediction system through the creation of new customers and for leads that already exist. Once the salesperson accepts those leads generated by the sales prediction system, they can evaluate the quality and information they have received for the lead. They determine if the details are sufficient to reach out to the customer and assess whether a lead is worth pursuing with the help of preconfigured assessment templates. If they can establish that the lead has potential and can be marked as qualified, the salesperson converts the lead to an opportunity. Contact is established and meetings and presentations are scheduled to move the opportunity along the sales pipeline.

### **External Third-Party Qualification**

Your company has obtained a list of contacts that purchased a new car in the last 90 days. You have hired a telemarketing company to call each contact to determine if there is interest in your company's auto security products. The third-party telemarketer provides weekly files. Using the lead import feature and qualification rules configured using Assignment Manager, the interactions resulting from the telemarketer's activities are imported as leads. Third-party qualification activity occurs on a periodic basis to provide qualification data. The marketing operations manager schedules the rules based qualification process to occur as soon as the enriched lead data is imported to the lead management system. If the rules evaluation is successful, the result sets the lead status as Qualified.

## **Lead Ownership and Sales Team Resources: Explained**

The market is typically organized into territories that comprise customers and prospects. Marketing is closely aligned with sales, and marketing activities are launched to generate leads and maintain the strength of the sales pipeline.

Resources who access leads have different roles as follows:

- Operations support for an automated process to capture leads, prioritize leads for sales engagement, and distribute the leads to appropriate sales or territory team resources.
- Marketing and the lead qualifier role involves lead monitoring, lead reassignment, and continuous review and adjustment of lead quality.
- Sales and territory teams enable lead qualification, perform follow-up lead activities, and convert leads to opportunities.

This topic explains:

- Lead, Sales, and Territory Resources
- Assignment of Leads to Marketing and Sales Resources

- Sales Resource Role
- Resource Privileges and Access Levels

### Lead, Sales, and Territory Resources

Sales resources are organized into flexible teams and are associated with the sales territories. These sales territories are then assigned to customers, leads, and opportunities to carry out the sales process. The lead follow-up process includes a lead team comprised of individual sales resources who are predominantly active during the lead qualification stage. A lead is then assigned to the appropriate sales team, and a territory team is created for the lead. All sales resources who are assigned to the territory team can view and follow up the lead.

### Assignment of Leads to Marketing and Sales Resources

Qualified leads are assigned to a sales team based on sales territories. Unqualified leads are assigned to individual lead qualifiers either manually or based on rules defined in Assignment Manager.

### Sales Resource Role

The sales resource performs the following activities:

- Review quality leads which are augmented with sales collateral, marketing content, customer contact interactions, and references.
- Qualify and assess the lead quality further with the help of customized assessment templates.
- Use the resource picker to manually select a resource to add to the team.

Include a description to indicate what role the resource has on the sales team. Many sales team members can access each lead, and each team member is identified as either an internal (sales force), or an external (channel partner sales force) resource. Each sales team member can be associated with a specific resource role to indicate what capacity the member has on the lead.

- Add additional contacts and products to the lead as the lead moves further down the sales cycle.

### Resource Privileges and Access Levels

Leads have three levels of access as follows:

Access	Privilege
Full	Read and update the lead and all child objects of the lead. Full access level allows you to update the sales lead team by adding or removing individual resources, or by updating the access level for any member.
View Only	View the lead and add lead notes. View the sales account associated with the lead, but no other leads or opportunities associated with the sales account. The View Only privilege also allows you to view most of the lead tabs.

Edit	Update all data on the lead except for Lead Team membership data and Lead Owner data.
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When the lead does not have any owner, you must Accept the lead which makes you the lead owner. Only the lead owner and the management chain of the lead owner can change the lead owner.

Territory team members inherit the access level of the territory. All members of the sales territories assigned to the lead have full access to the lead. Owners of ancestor territories of all sales territories assigned the lead also have full access to the lead.

## Sales Team Examples

A lead sales team comprises assigned territories and individual team members. The following examples illustrate some of the features available for the lead sales team:

- Automate assignment of territories to lead territory team
- Automate assignment of individual salespersons to sales team
- Add ad hoc members to sales team
- Update access rights based on the resource
- Change the lead owner

### **Automate assignment of territories to lead territory team**

A lead exists with XYZ Company to purchase 50 large wind generator units in several Western Region states. To ensure that Western Region salespersons get assigned to the lead, the administrator has set up Assignment Manager to automatically add the Western Region territory to the lead territory team.

Sales departments arrange the sales force based on sales territories. Sales resources are organized into flexible teams and are associated with the sales territories. These sales territories are then assigned to customers, leads, and opportunities to carry out the sales process. A territory is the range of responsibility of salespersons over a set of sales accounts. Territories are assigned to sales accounts when the sales accounts are created. The lead sales team comprises the assigned territories and special resources who are manually assigned to the team on an ad hoc basis.

### **Automate assignment of individual salespersons to sales team**

The lead sales team for XYX company want to add a support person to the lead. Typically, support people are not part of any sales territory. There is a rule set group which assigns support team members as individual resources based on rules which match the lead product with the specific support team members.

### **Add ad hoc members to sales team**

Generally, sales team resources are automatically assigned to leads based on configured assignment rules. The following scenarios provide examples for

when you may want to manually add additional team members to assist with the lead.

The lead owner, who has full access to the XYZ lead, wants to add one of his company's contractual experts to his team to help pursue the lead. The lead owner manually invokes a resource picker and selects the ad hoc resource that he wants to add to his team.

When pursuing a lead for an insurance policy, the customer contact requests a unique and complex combination of policy components that require an expert in the company to review. The lead owner adds the expert resource to the lead with full access so they can update the lead with valid combinations of products and services, and, if required, add more team members to the team.

Finally, a salesperson is pursuing a lead that requires the export of products outside the country. The salesperson wants to ensure there are no legal issues with exporting the products and adds a member of their company's legal counsel to the lead to review the details before contacting the customer again.

### **Update access rights based on the resource**

When a resource is initially added to the lead sales team through rules-based assignment, a profile option setting determines the member's default access level. Resources in the management hierarchy of a newly added team member have the same level of access to the sales leads as the team member.

All members of the sales territories assigned to the lead have full access to the lead. Owners of ancestor territories of all sales territories assigned the lead also have full access to the lead.

### **Change the lead owner**

Only the lead owner or the resources in the management hierarchy of the lead owner can change the lead owner.

## **Lead Assessments: Explained**

Lead assessment templates enable a uniform assessment implementation across leads and provide guidance to sales resources to move the leads further along the sales cycle.

Using lead assessments, you can:

- Define Lead Assessments Templates
- Associate Task Templates to Assessment Templates
- Assess Leads

### **Define Lead Assessments Templates**

Assessment templates can be defined with assessment questions representing industry best practices, sales methodologies, or a combination of both. As you enter the different responses to the questions, an assessment progress bar provides immediate rating and feedback based on the assessment definition. You can also use assessment templates to standardize lead follow-up procedures.

Lead Assessment Templates enable consistent and predictable assessment for all leads in the business unit.

### Associate Task Templates to Assessment Templates

An additional component to the assessment is the ability to recommend additional tasks based on the assessment results. If task templates are associated to the assessment, a list of recommended task templates is presented to you based on the assessment's overall score. If applied, the tasks are added to the lead to support collaborative lead follow-up activities.

### Assess Leads

Lead assessment is typically done as part of a lead follow-up activity where the lead continues to be progressed after the lead is qualified. The Lead Assessment Enabled profile option must be set by your administrator to display the Assessments tab in the Edit Lead user interface. If enabled, you can view the sets of predefined questions and answers collected to assist in evaluating the lead and perform the following actions from the lead's Assessment tab:

- Perform New Assessments
- Edit Assessments
- Remove Incomplete Assessments
- Reassess
- View Historical Performance

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#### Note

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## FAQs for Follow Up Leads

### What's the difference between response, lead, and opportunity?

The following table describes the main differences between a response, a lead, and an opportunity.

A response is ...	A lead is ...	An opportunity is ...
An interaction initiated by the customer in response to a marketing stimulus. Every outbound marketing activity is a marketing stimulus.	An inquiry, referral, or other information, obtained through marketing campaigns or other means, that identifies a potential contact or prospect and specific purchase interest.  <b>Note</b>  A lead can also be created even if the specific purchase interest is not known at the time of lead creation. However, for this lead to get qualified, it is necessary to record a primary purchase interest.	A pending sale of a product or service that can be forecasted and tracked using summary data such as potential revenue, sales stage, win probability, and expected close date.

<p>Created from interest recorded from responders in response to marketing activities. Responses include providing answers to phone survey questions, subscribing to a list, replying to an e-mail response form request, and so on. As interest for the product or service matures, responders are elevated as leads.</p>	<p>Mostly created by automated lead capture or lead import processes which periodically create qualified responders as sales leads.</p> <p>Sometimes created from the response data of a contact or prospect who has expressed a need or interest in a product or service offered by the business.</p>	<p>Created by salespersons when they have identified a qualified lead with a potential revenue opportunity. Leads are converted to opportunities when significant sales investment is foreseen to close the deal.</p> <hr/> <p><b>Note</b></p> <p>A salesperson can create opportunities from scratch, without previously having a response or lead created.</p>
<p>Solely owned by Marketing.</p> <p>Not included as part of the sales forecast.</p>	<p>Transferred between Marketing and Sales departments based on how the lead progresses through its lifecycle.</p> <p>Not included as part of the sales forecast.</p>	<p>Solely owned by Sales who have complete responsibility for managing the lifecycle of an opportunity.</p> <p>Included in the sales forecast at the discretion of the salesperson.</p> <p>Not all opportunities get included in the sales forecast and the decision to include them in the forecast may depend on your company's requirements.</p>

### Why did the deal size change?

The deal size is automatically determined by the products entered for the lead. Adding or removing products causes the deal size to be recalculated. You can override the calculated amount after all products have been entered. For example, if the lead is eligible for a discount, you can manually change the total of the deal size to apply the discount. However, if you add or remove a product from the lead after having manually adjusted the deal size, the application overrides the deal size total and you have to reapply the manual change.

### What happens if I manually change a lead rank that was automatically assigned?

Lead rank suggests a priority to help you select leads for follow up. When the lead is created, a lead rank is first calculated by Assignment Manager based on ranking rules. You can select a different lead rank code or value from the list in the user interface, but when the lead is further processed, a different rank may be assigned based on enriched lead data, or the rules may cause the lead to revert to its original rank.

### How can I add lead contacts to my sales campaign?

From the Overview list of leads, select the lead you want. From the Lead Details, click the Contacts tab. Select the contacts that you want to add to your sales

campaign. From the Actions menu, select Add to Sales Campaigns to view and select from your saved campaigns. Your contacts are notified either when you launch your sales campaign or at the next scheduled mailing if you scheduled your sales campaign to repeat.

### **What's the difference between lead qualification and lead assessment?**

Lead qualification determines whether a lead has a budget and project timeline defined, and indicates if someone with purchasing authority is identified. Company specific standard questions and the associated scoring mechanism help to capture the additional data critical to qualifying leads. A lead is typically considered qualified when the need and purchase interest are confirmed.

Lead assessment helps in the lead follow-up process, where the salesperson continues to assess the lead quality and lead conversion potential through preconfigured assessment templates. From the Assessment tab, the salesperson can conduct a new assessment, view completed assessments, and view the responses to the questions. Assessment templates provide the mechanism for the salesperson to analyze the lead and suggest appropriate next steps based on the overall assessment score and feedback for the lead.

### **When does an interaction display for my lead?**

An interaction displays in the lead's Interaction tab when the lead is identified as a related object on the interaction. The Interaction tab also displays all customer interactions. When creating an interaction within a lead, the lead reference type and reference is automatically set as a related object. However, you can also identify additional related objects. For example, you can create an interaction within a lead and add another lead and an opportunity to the same interaction. The Interaction tab also shows all customer interactions which may not be associated with that specific lead. Interactions for all object types for a particular customer can be viewed in Customer Center.

### **Why did customer reference display for my lead?**

A customer reference is based on the customer industry and associated lead product or product group related to the specific lead. For example, a customer reference displays for your lead if a customer has purchased a similar product or service. As a salesperson, you can leverage the reference details for effective lead follow up.

The leads user interface is designed to ensure that you are more productive as a salesperson and that you can readily access related lead information with as few clicks as possible. Supporting data related to each lead is included in the contextual area for easy reference. Lead contextual areas include references, all open leads and open opportunities for the lead customer, as well as supporting collateral. This information is useful to the lead sales team to facilitate the effective lead follow up.

### **What happens if I convert a lead to an opportunity?**

You convert a lead to an opportunity when the lead is qualified and is ready for sales engagement. A lead must be associated with a sales account and must have

a primary product associated with it before you can convert it to an opportunity. Once the conversion is successfully completed, you can review the newly created opportunity in Oracle Fusion Opportunity Management. During your review, you might need to retain only a select few lead product lines to pursue as opportunity revenue line items. Since the conversion process automatically creates the revenue lines from all lead lines, you can remove unwanted revenue lines from the Opportunity details page.

When you convert a lead to an opportunity, the following rules may apply depending on the setup criteria for your company:

- The person converting the lead becomes the primary sales team member for the opportunity.
- The reference for the original lead is maintained for the opportunity.
- The associated lead team members are copied with the same primary team member.
- The newly created opportunity is assigned to the appropriate sales territories.

Opportunities that are associated with leads from the Opportunity Management area are displayed as a list from the Lead - Opportunities tab.

### **Can I create more than one opportunity from a single lead?**

Yes, you can convert the same lead again into another opportunity and then delete unwanted revenue lines. For example, during your review of an opportunity that was created from a lead conversion, you might need to retain only a select few lead product lines to pursue as opportunity revenue line items. Since the conversion process automatically creates the revenue lines from all lead lines, you can remove unwanted revenue lines from the Opportunity details page. You can, at a later stage, create another opportunity from the removed lead revenue lines by converting the lead to an opportunity again and then by keeping only those revenue lines on the new opportunity.

### **Why can't I see converted leads in my list of opportunities?**

If, after conversion, you do not see the lead in your list of opportunities, this means that the opportunity is assigned to a different territory.

## **Assess Opportunities and Leads**

### **Assessment Templates: Points to Consider**

Assessment templates let you analyze the health of a business object, such as a lead or an opportunity, and suggest appropriate next steps based on its diagnosis. To best plan and create assessment templates, you should consider the following points:

- Ratings

- Questions, Question Groups, and Question Weights
- Responses and Scores
- Associated Task Templates

## **Ratings**

A rating is a textual qualification such as Excellent. There are three delivered ratings in the assessment template: Excellent, Average, and Poor. Ratings provide a metric other than a numerical score for qualifying the outcome of an assessment. Ratings are created at the beginning of the assessment template creation process. They are later applied to possible responses to questions in the template, which associates each rating with a score. An appropriate feedback will be displayed to you based on the completed assessment score once you submit an assessment. When setting up ratings and applying them to possible responses, it is important to remember that they and their associated feedback text will eventually display as part of the overall assessed health of a business object.

## **Questions, Question Groups, and Question Weights**

Questions are the main components of an assessment template. They are written such that they aid in systematically determining the health of a business object, and they are grouped into logical collections called Question Groups. Each question in the template is assigned a question weight, expressed as a percentage, which is the relative importance of the question within the template. When an assessment template is used to perform an assessment, a question's weight is multiplied by the normalized response score given for the question to produce a weighted score for that question. When setting up questions, question groups, and question weights, it is important to carefully analyze which factors determine the health of a particular business object (like a lead or an opportunity) in your organization. Use those factors to create your question groups; and then, for example, write three to five questions per group that are weighted according to your analysis. There is no limit to the number of questions that can be in a question group, but each question group must have at least one question.

## **Responses and Scores**

Responses are attached to questions in the template. Each question should have at least two responses, unless it's a free-form only question. More than one response can be tied to the same rating but, between all of its responses, each question should accommodate at least two ratings, unless it's a free-form only question. For example, if your ratings are Excellent, Average, or Poor you may, for each question, include two responses that correspond to at least one of those ratings, such as average. There must be enough responses to cover at least two of the ratings such as Excellent and Average. You assign a score to each response for a question, and the application normalizes the score based on a standard scoring scale. When an assessment template is used to perform an assessment, a question's weight is multiplied by the normalized score of the response given for the question to produce a weighted score for that response. When adding responses to questions, ensure that the scores and ratings you assign to

each response correlate. In other words, the higher the score you assign to the response, the higher the rating should be so that you have a strong quantitative relationship between the two. Also note that you can allow free-form responses for one or more questions in the template, but free-form responses are never scored.

### **Associated Task Templates**

A task template is an instruction to generate a group of related activities. You can associate task templates with an assessment template in order to recommend tasks that should be performed after an assessment has been done for a business object. When you associate task templates with an assessment template, you can indicate a score range for each task template, and based on the total score of any assessment that uses your template, one or more task templates will be recommended as follow-up activities. In order for a task template to be available to associate with an assessment template, it must be assigned to the same business object type as that assigned to the assessment template, and it must have a subtype of Assessment. Ensure that you have set up task templates correctly before attempting to associate them to assessment templates.

## **Assessment Template Score Range: How It's Calculated**

The application calculates the score range for an assessment template using the question weights and the ratings and scores assigned to the possible responses for all the questions in the template. This topic explains when the score range is calculated and the components that are used in the calculation, so that you can make the best decision regarding the feedback text to apply to each score range. In addition to the automatic score range calculation, a manual method for adjusting score range is also available on the administration UI.

### **Settings That Affect Score Range**

In order for the application to calculate the assessment template score range, you must:

- Apply weights to all template questions.
- Configure ratings and apply them to possible responses for all template questions.
- Apply a score to each of the possible responses for all template questions.

### **How Score Range Is Calculated**

The score ranges for each rating in an assessment template are determined using the lowest and the highest weighted response scores for each question. So for each rating score range, the lower end of the range starts where the previous rating range ended, and the higher end of the range is the sum of the highest weighted scores that can be attained for that rating.

This table displays a simple example of the components used in the score range calculation.

Question (Weight)	Response (Normalized Score)	Weighted Score	Rating
What is the customer win? (20%)	Lower Operating Cost (100)	20	Excellent
	Higher Revenues (80)	16	Average
	Other (53)	11	Average
	Don't Know (27)	5	Poor
What is our win? (80%)	Reference (60)	48	Average
	Resale (50)	40	Poor
	Partnership (100)	80	Excellent

This table displays the score range calculation based on the components from the first table.

Rating	Score Range	
Excellent	65 - 100	
Average	46 - 64	
Poor	0 - 45	

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#### Note

If a template administrator does not use a particular rating while assigning ratings to possible responses, this could result in improper score range calculations. To counteract this problem, the score range calculation uses a built-in correction algorithm to ensure proper score ranges. The correction algorithm works like this: For a question where a particular rating is skipped, the low score for the skipped rating is calculated to be equal to the high score of the next lower ranked rating. The high score for the skipped rating is calculated to be equal to the low score of the next higher ranked rating.

Using the ratings displayed in the tables above, if the rating Average is not used for a question's possible responses, the score range calculation assigns a low score to Average for that question that is equal to the high score of Poor for that question. It also assigns a high score to Average for that question that is equal to the low score of Excellent for that question. This ensures that the overall template score range for Average is calculated to fall between the score ranges for Poor and Excellent.

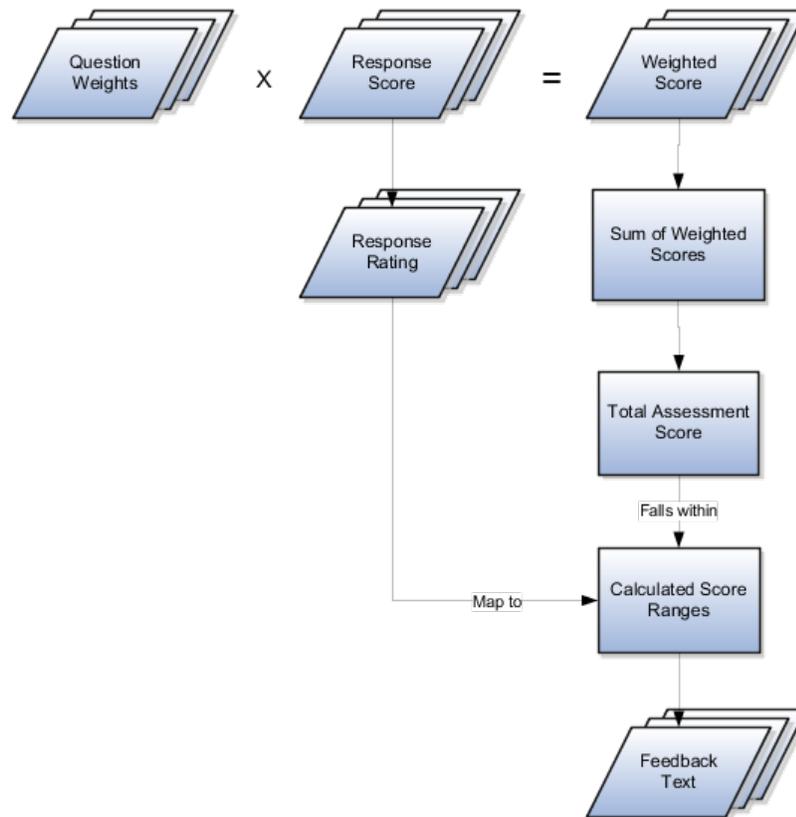
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## Assessment Template Components: How They Fit Together

The question weight, response score, and response rating are the assessment template components that fit together to calculate and display the overall assessment score, rating, and feedback text.

A question weight is multiplied by a response score to achieve a weighted score for an assessment template response. The weighted scores for all responses are added together to determine the total assessment score. This score will fall within a precalculated score range that is associated with a response rating and feedback text. Therefore, the score range within which the total assessment

score falls determines the rating and feedback text to display for a completed assessment.



### Question Weight

The question weight is the relative importance of a question within an assessment template, and it is expressed as a percentage. All of the question weights within a template must total to exactly 100. When an assessment template is used to perform an assessment, a question's weight is multiplied by the score of the response given for the question to produce a weighted score for that response.

### Response Score

A response score is the score assigned to a possible response to a question in the template. The template administrator sets response scores with no upper or lower bounds, and each score is normalized in order to accurately score an assessment that uses the template. The response scores are normalized by assigning a score of 100 to the highest response score, and then all other responses are assigned a normalized score relative to that highest score.

When an assessment template is used to perform an assessment, the normalized score of the response given for the question is multiplied by the question's weight to produce a weighted score for that response.

### Response Rating

A response rating is the rating assigned to a possible response to a question in the template. A rating is a textual qualification like Excellent or Poor that provides a metric other than a numerical score for qualifying the outcome of an

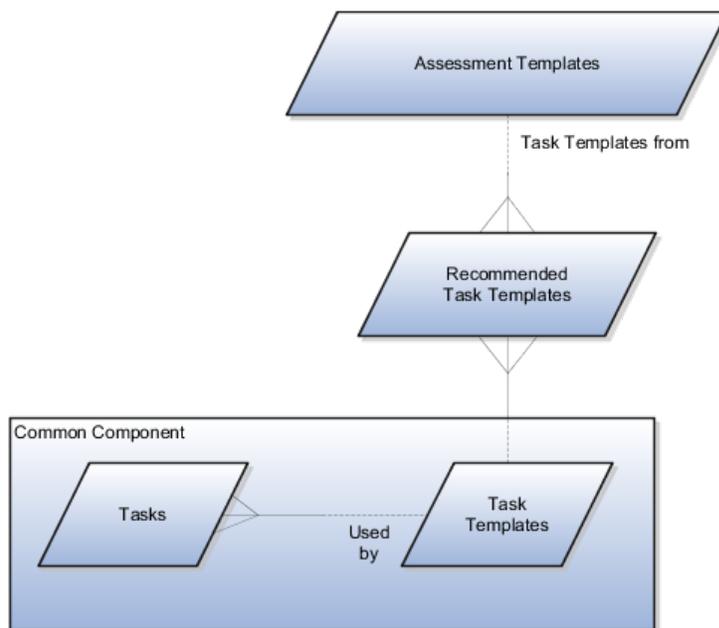
assessment. A response rating is directly related to a response score, and this relationship should ensure that a higher score will translate to a higher rating.

Early in the template creation process, the administrator configures ratings to assign to responses. The administrator then assigns scores and ratings to responses, and the system calculates score ranges based on those entries. Each rating is assigned to a score range, and the administrator is given the opportunity to apply feedback text to the rating-score range combination.

When an assessment template is used to perform an assessment, the weighted scores from all responses are added to determine the total assessment score. That score will fall somewhere within the calculated score ranges, which then determines which rating is assigned to the assessment and what feedback text to display. The maximum total assessment score is 100.

## Assessment Templates and Task Templates : How They Fit Together

One of the steps for creating an assessment template is associating task templates. You would take this step if you want to recommend sets of tasks to be done after an assessment is performed using your template. You associate task templates to ranges of scores in the assessment template, and where the overall assessment score falls within those ranges determines the tasks that are suggested to be performed after the assessment.



### Assessment Template

An assessment template is a set of weighted questions and possible responses used to evaluate the health of a business object such as an opportunity or a lead. An assessment template can be associated with one or more task templates that are recommended based on the outcome of an assessment.

### Task Template

A task template is an instruction to generate a group of related activities. By marking a task template with a subtype of Assessment, you make that task

template available for association with assessment templates. The task template's business object type should be the same as that assigned to the assessment template. When an assessment is performed using an assessment template that has associated task templates, one or more task templates are recommended based on the total score of that assessment and can be used to generate a list of activities to perform.

For example, you can associate a task template called Engage Business Development Manager with your assessment template called Potential for Win-Win. Associate the task template with the score range of 86 to 100, so if an assessment using the assessment template Potential for Win-Win scores within that range, the application recommends the Engage Business Development Manager task template and a list of follow-up activities based on that template can be generated.

## Assessment Template Status Codes: Explained

Throughout the life of an assessment template, it can be assigned several different status codes.

These status codes control the actions you are allowed to make against an assessment template.

- In Progress
- Active
- Retired

### In Progress

This is the initial status of an assessment template. When an assessment template is at this status, you can edit any part of it. This is the only status at which you can delete a template. If the template is not deleted, it moves to the Active status next.

### Active

This is the status assigned when the assessment template has been deployed for general usage. When an assessment template is at this status, you can make only minor textual edits to it, including, but not limited to, template description, question text correction, question sequencing change, response description, and score range feedback. From this status, you can move the template to Retired; you cannot delete it.

### Retired

When an assessment template is at this status, it is no longer available for general usage. You cannot edit any part of it, and you cannot move it to any other status; however, it can still be copied. Active templates that are deleted revert to this status.

## FAQs for Assess Opportunities and Leads

### What's a Question Group?

A question group is a logical grouping of questions within an assessment template, and it is used strictly as a category header for those questions. Through careful naming of a question group, you can achieve the benefit of providing the user of the template with an approximate idea of the type of questions to expect in each group.

### What happens if I include a free-form response for a question?

A score of 0 is assigned for free-form responses.

A free-form response option will have no effect on the overall assessment score. The free-form response offers the opportunity to enter a textual response to a question that does not conform to any of the pre-populated responses provided by the assessment template.

### Why am I being asked to enter question weights again?

This step lists all of the assessment template questions in one place, and provides you with the opportunity to edit weights as necessary to ensure that the sum of all weights totals 100.

## Manage Opportunities

### Opportunity Saved Searches: Explained

Several saved searches can aid you in locating opportunities.

Saved Search	Purpose
My Opportunities	Opportunities where you are the opportunity owner
My Sales Team Opportunities	Opportunities where you are a member of the sales team
My Subordinates' Opportunities	Opportunities where one of your subordinates is the opportunity owner
My Subordinates' Sales Team Opportunities	Opportunities where one of your subordinates is a sales team member
All Opportunities	Opportunities that you have visibility into

### Sales Stages: Explained

Sales stages are phases of progress of an opportunity toward its eventual conclusion, either a won sale or a lost sale. A single sales method typically contains a collection of sales stages. For example, you might have five sales stages within a sales method, each with its own attributes and each which serves a different purpose in the progression of the opportunity.

## Sales Stage Attributes

When setting up the sales stage, sales administrators typically define the following attributes:

- **Phase:** Indicates the phase of the sales stage in the sales cycle and provides a way to define groups of sales stages. For example, the first phase of an opportunity sales method might be the Discovery phase, where the salesperson researches the customer's needs and begins to formulate a plan for what to sell the customer.
- **Order:** Specifies the sequential ordering of stages within a sales method. For example, the first phase of a sales stage might be the Discovery phase, while the last might be the Conclusion phase.
- **Duration:** Estimated average days an opportunity will remain in a sales stage.
- **Stalled Deal Limit:** Number of days that an opportunity is allowed to remain in a particular sales stage. If the opportunity exceeds this limit, the opportunity is considered stalled.

Administrators can use the supplied sales stages or create new sales stages unique to their businesses. Administrators also have the option of adding a sales coach that defines the process steps and recommends resources that can guide the salespeople through each sales stage.

## Sales Methods and Sales Stages: How They Fit Together

Sales methods and sales stages have a one-to-many relationship. In a typical implementation, a single sales method has several sales stages. Each stage within a sales method delineates the progress of an opportunity.

### Sales Methods

A sales method is a formalized approach used to capture sales stages during the sales process. A sales method can encompass all activities associated with different sales stages during the sales process, from prospecting to forecasting to closing opportunities. Sales methods enable best practices to be implemented across sales organizations.

### Sales Stages

Several stages typically exist within a single sales method. Sales stages progress the opportunity toward its conclusion. At the time of opportunity creation, the application sets an opportunity to the first sales stage in the sales method being employed.

## Sales Coach: Explained

Sales Coach is both a teaching tool and a method to push best practice information to you in order to improve sales.

The following aspects of Sales Coach can assist you in your efforts to bring opportunities to a successful close:

- Process steps
- Recommended documents
- Task templates
- Assessment templates
- Required fields

### **Process Steps**

Process steps guide you through the best-practice processes that you should follow during a particular sales stage. For example, in the Discovery sales stage, your company may recommend that you interview the potential customer, develop a product list, and make a go or no-go decision on progressing an opportunity to the next sales stage.

### **Recommended Documents**

Recommended documents, such as customer letter templates, relevant Web sites, and training materials, provide coaching strategies and best-practice information, among other uses.

### **Task Templates**

Task templates provide a list of required or recommended tasks relevant to a particular sales stage. Recommended task templates are optional. Autogenerated task templates are automatically applied to your list of tasks for a particular sales stage, when the opportunity moves to that stage.

### **Assessment Templates**

Assessment templates enable the analysis and scoring of an opportunity object, such as a product, a competitor, or an opportunity overall. After selecting an assessment type, you enter a series of responses to achieve a weighted score. This score then helps determine the success rate of the opportunity.

Assessment templates, like task templates, can be applied automatically to an opportunity (if they are marked as mandatory for a sales stage), or they can be applied manually.

### **Required Fields**

For each sales stage, the administrator can specify the fields in the opportunity header that you must enter before the opportunity can progress to the next sales stage.

## **Default Sales Channel in Opportunities: Explained**

The sales channel of an opportunity indicates whether the opportunity is being handled directly by an internal salesperson, or indirectly by an outside partner, such as a distributor or a reseller. Having an accurate sales channel value allows the correct territories and salespersons to be assigned to the opportunity. Because sales channel is a dimension in territory definitions, companies that sell through both direct and indirect channels can use territory metrics to slice and dice their revenue data by sales channel. This topic discusses support for sales

channel and the way the sales channel field default settings are implemented in opportunities.

## **Sales Channel Support**

Opportunities support the tracking of sales channel at both the opportunity header and revenue line levels. To make it easier to maintain opportunities, the application automatically synchronizes header and line sales channel that are of the same sales status category. The default setting for opportunity and revenue line sales channel is established in the setup window, Manage Default Attributes for Partner Opportunities. This setup allows the Lead Registration Type of a partner lead to determine the default sales channel on an opportunity once the lead registration is approved and converted into an opportunity. If Oracle Fusion Partner Management functionality is not implemented, the system automatically sets the sales channel to Direct for all opportunities. Refer to the topic, Partner-Registered Lead Attributes: Explained, for additional information.

### **Default Sales Channel During Opportunity Creation**

If a salesperson creates an opportunity in the opportunities UI, since there is no partner and no lead registration type associated with the opportunity, the header-level sales channel field is set to Direct. If the salesperson creates revenue lines while creating the opportunity, the sales channel of those lines is set to the same sales channel as the header.

If an opportunity is created from a lead conversion, it will not have a lead registration type, and the sales channel also will be set to Direct.

If an opportunity is created from an approved lead registration, the application uses the lead registration type to determine the appropriate header-level sales channel value. For example, an opportunity that originated from a Resale lead registration carries a default sales channel of Indirect (using the default configuration). The header-level sales channel value is then used to determine a default sales channel on the revenue lines on the opportunity.

Note that if a lead registration is linked to an opportunity manually from the leads UI, the sales channel defaulting logic based on lead registration type does not apply.

### **Default Sales Channel During Revenue Line Creation**

When a revenue line is created, the default value of the revenue line sales channel always matches the header-level sales channel value. The application does not use the default setup mapped in the Manage Default Attributes for Partner Opportunities window to default the revenue line sales channel.

### **Synchronization Between Opportunity and Revenue Line Sales Channel**

In terms of general synchronization of revenue lines and the opportunity header, revenue lines that are of the same status category as that of the header level automatically carry the same sales channel value, unless user has explicitly overridden the sales channel at the line level.

If the salesperson changes the header-level sales channel value, all revenue lines that have the same sales channel value as the header and the same status category as the header are synchronized to the new value. For example, if the header-level opportunity status is Open and the sales channel is Direct, and the

salesperson changes it to Indirect, all Open revenue lines that have a Direct sales channel will automatically be changed to Indirect. Revenue lines that do not match these criteria remain unchanged.

## Closing an Opportunity: Explained

Closing an opportunity begins when you move an opportunity into one of the sales stages or statuses that means closed, such as Won, Lost, or No Sale.

If enabled as a required step, once you start the process of closing an opportunity, you must enter data about the closed opportunity in the close opportunity screen. The required data can include information about competitors, products, revenue, and reasons that the opportunity was won or lost.

To close an opportunity, select the **Close Opportunity** action or the **Save and Close** button from within the edit screen of the opportunity. Then application will then prompt you to enter the data required to close the opportunity.

There are three ways to close an opportunity:

- Closing an opportunity using the close opportunity UI -- See the topic, *Closing an Opportunity Using the Close Opportunity UI*, for more information.
- Closing an opportunity using the edit opportunity UI -- See the topic, *Closing an Opportunity Using Edit Opportunity UI: Explained*, for more information.
- Closing multiple opportunities using the mass update opportunities UI -- See the topic, *Closing Multiple Opportunities Using the Mass Update Opportunities UI: Explained*, for more information.

## Benefits of a Dedicated Close Opportunity Flow: Explained

Implementing a dedicated close opportunity flow and mandatory summary screen can be of great benefit to deploying organizations, as discussed in the points that follow.

- Deploying organizations can add, through extensibility, custom fields potentially visible only during closing.
- The act of closing an opportunity is like a transactional submission, since closing an opportunity has consequences (although the changes are reversible). Traditional UI behavior suggests that a final submission step should be preceded by a summary UI displaying the key attributes for that object.
- A comprehensive UI lets sales representatives review all opportunity key attributes and make quick changes if warranted before going through with the close process.
- Certain mandatory fields need to be addressed during closing, such as Win/Loss Reason and Competition. A dedicated UI provides a much better experience in terms of attracting the representative's attention to those fields immediately before closing the opportunity.

- Skipping the dedicated close UI in favor of validations in the edit opportunity UI may put off users due to the following reasons:
  - Some of the validations may not even be visible without expanding all the revenue items. For example, entering competitors is required during closing (both at the summary as well as revenue item level).
  - It may take the representative several mouse clicks to close an opportunity in the edit opportunity UI, since he might need to explicitly save repeatedly as the application cycles through the close validations. The total cost of these save attempts may weigh heavily on the application usability.

## Closing an Opportunity Using the Close Opportunity UI: Explained

When sales representatives close an opportunity, Oracle Fusion Opportunity Management presents a summary screen where the representative must review and enter information about the opportunity before the opportunity can be closed. The summary screen allows the representatives to enter last-minute changes to the opportunity header and revenue items before submitting the opportunity to the close process. The following behavior is noted on the summary screen:

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### Note

This flow is supported only when the profile option, Close Opportunity Flow Enabled, is on.

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- Except for the competitor fields in the revenue items, all applicable UI fields (including status codes) and their corresponding states in the edit opportunity page are carried over close opportunity UI. For example, if user has changed the state to a closed category in the edit opportunity page and the win/loss reason fields are enabled, these changes are carried over to the close opportunity page as well. If the status in the original page is Open, the same status is carried over to the summary screen when the close opportunity UI is invoked.
- If there is at least one competitor at the opportunity level, the primary competitor from the header is propagated to all revenue items without competitors. If the user changes the primary competitor once inside the close opportunity page, the application will not propagate the new primary competitor to the in-sync revenue lines.
- If a user cancels changes from the close opportunity page, the application navigates back to the edit opportunity page, erasing any changes made on the close opportunity page. Pending changes on the edit opportunity page are left pending, including the status that was last set on the edit opportunity page.
- After successfully validating and closing the opportunity (using the confirmation action on the close opportunity UI), the application navigates the user to the edit opportunity page, where he must click Save or Save and Close to process all opportunity closing validations and commit the close opportunity related changes.

## Close Opportunity Page Transaction Management

On entry to the close opportunity page from the edit opportunity page, any unsaved changes made to the opportunity on the edit opportunity page are preserved and reflected in data that appears on the close opportunity page.

Clicking the cancel button on the close opportunity page rolls back any changes made to the opportunity since entering the page and returns control to the edit opportunity page with the opportunity in the state it was in prior to entering the close opportunity page (as though a savepoint was issued on entry to the close opportunity page and a rollback to the savepoint is issues on cancel).

Clicking the **OK** button on the close opportunity page preserves unsaved changes made since entering the close opportunity page and returns control to the edit opportunity page without saving them. A subsequent save action on the edit opportunity page is required to commit changes made on both the edit opportunity and close opportunity pages.

### Validations and Synchronization Behavior

Closing an opportunity using the dedicated close opportunity flow UI conforms to all validations and interrelated behavior between the opportunity header and revenue line attributes. Close opportunity UI synchronization behavior is derived from the interrelated behavior between an opportunity header and revenue items.

## Close Opportunity Page Save and Cancel Behavior: Explained

The close opportunity flow follows standard behavior for transaction management. The main points are:

- On entry to the close opportunity page from the edit opportunity page, any unsaved changes made to the opportunity on the edit opportunity page are preserved and reflected in data that appears on the close opportunity page.
- Cancelling changes in the close opportunity page rolls back any changes made to the opportunity after entering the close page and returns control to the edit opportunity page with the opportunity in the state it was in prior to entering the close opportunity page (as though a savepoint was issued on entry to the close opportunity page and a rollback to the savepoint is issues on cancel).
- Selecting the Ok button on the close opportunity page preserves unsaved changes made after entering the close opportunity page and returns control to the edit opportunity page without saving them. A subsequent save action on the edit opportunity page is required to commit changes made on both the edit opportunity and close opportunity pages.

## Closing an Opportunity Using Edit Opportunity UI: Explained

Sales representatives can use the edit opportunity page to close opportunities. The option of closing an opportunity in the edit page is available irrespective of whether the profile option, Close Opportunity Flow Enabled, is enabled.

In this method, the user sets the opportunity status to one of the closed status categories. This, in turn, sets the status of all synchronized revenue items to that of the header closed category status. In addition, the following behavior occurs:

- The win/loss reason for the opportunity and the revenue items becomes enabled. The user can set the win/loss reasons individually at the revenue item level, or he can change the opportunity header win/loss reason. Once the user enters the win/loss reason at the header level, the reason is propagated to all revenue items without a win/loss reason.
- The user is expected to add competitors to the opportunity both at the header and revenue item levels, if he has not already done so.
- The user selects Save or Save and Close, which kicks off a series of opportunity closing validations before committing the transaction.

### **Validations and Synchronization Behavior**

Closing an opportunity using the edit opportunity flow UI conforms to all validations and interrelated behavior between opportunity header and revenue line attributes. The edit opportunity UI synchronization behavior is derived from the interrelated behavior between opportunity header and revenue items.

### **Exceptions**

Note the following exceptions to the normal opportunity synchronization behavior and validations when the edit opportunity UI is used to close an opportunity:

- An update to an opportunity win/loss reason does not result in propagation of the update to all of the opportunity's revenue lines where the win/loss reason attribute is in sync.
- As long as the opportunity primary competitor is defined, an update to the opportunity status from an open status to a closed status will not update the revenue line competitor attribute for all opportunity revenue lines where the competitor attribute is undefined.

## **Closing Multiple Opportunities Using Mass Update Opportunities UI: Explained**

Salespersons can multi-select opportunities in the opportunity list and mass update certain fields or attributes within them. The Mass Update dialog box displays name-value pairs of attributes that are mass updatable. The salesperson confirms selection of the fields, enters the desired values, and commits changes to update all of the selected opportunities. The dialog box is dismissed and the opportunities list refreshes to display the new values.

### **Validations**

Closing an opportunity using the mass update opportunities UI conforms to all validations and interrelated behavior between opportunity header and revenue line attributes, with only a few exceptions that are covered in the next section.

During mass update, the following attributes exhibit special interrelated behavior with respect to revenue items:

- Win probability
- Close date
- Include in forecast setting
- Status
- Win/loss reason

The mass update process involves marking a few available fields for update, and then entering the appropriate update values for those fields, and committing all the changes all at once. From the user's point of view, this is a straightforward process. However, the picture is far more complicated on the backend, for the following reasons:

- All validations performed for normal opportunity updates (using the edit opportunity UI) need to be maintained for all opportunities marked for mass update.
- All synchronization behavior supported for regular opportunity updates (using the edit opportunity UI) needs to be maintained for all opportunities marked for mass update. This involves updating opportunity header fields, as well as propagating the updates to underlying synchronized revenue items for all opportunities selected for mass update.
- Most close flow validations and interrelated updates for underlying revenue items while closing an opportunity (using either the edit opportunity UI or the dedicated close opportunity UI) need to be maintained for all opportunities being mass updated to a closed status.

### **Synchronization Behavior**

Mass update synchronization behavior is derived from the interrelated behavior between opportunity header and revenue items. See the topic, [Syncing Behavior of Opportunity and Revenue Line Attributes: Explained](#), for more information.

### **Exceptions**

Note the following exceptions to the normal opportunity synchronization behavior and validations when the mass update opportunity UI is used to close an opportunity:

- When an opportunity with one or more revenue lines in a closed status is saved, a validation check may fail because a revenue line competitor attribute is undefined. When opportunity save validation fails for this reason, if the opportunity primary competitor is defined, the error dialog that appears will offer the user an option to correct the validation failure by copying the opportunity primary competitor to all of the revenue lines having undefined competitor attributes. This behavior applies to both edit opportunity and close opportunity flows.
- The behavior does not apply to the mass update opportunities and flow. A validation failure due to missing required revenue line competitor attributes will result in an error message with no options to correct the validation failure.

## Summary of Mass Update Opportunities Business Logic

In the context of the mass update functionality, when any of the following are updated, the application copies the opportunity attribute value to the revenue line attribute values

- Win probability
- Close date
- Include in forecast setting
- Status
- Win/loss reason

Opportunities follow set behavior during mass update, as described in the following tables.

Change in Opportunity Status	Behavior
To won	Set sales stage to last stage of sales method. Set win probability to 100 percent.
To lost or no sale	Set close date to current date.
From open to closed	<ul style="list-style-type: none"> <li>• Enable win/loss reason.</li> <li>• Copy primary competitor to revenue line where competitor is undefined.</li> <li>• Set actual close date to system timestamp.</li> </ul>
From closed to open	<ul style="list-style-type: none"> <li>• Disable win/loss reason. Set win/loss reason to undefined.</li> <li>• Set actual close date to undefined.</li> </ul>

Object to Validate	Validation Behavior
Competitor	If the profile option, Close Opportunity Competitor Requirement, is enabled, require competitor on opportunity and revenue line.
Win/loss reason	If the profile option, Close Opportunity Win/Loss Reason Requirement, is enabled, require win/loss reason on opportunity and revenue line.
Status	Revenue line status must be valid for opportunity status.

## FAQs for Manage Opportunities

### Why did some fields change when I changed the sales stage?

When you move an opportunity to the next sales stage, the opportunity-level win probability increases to reflect the progress of the opportunity. The win probabilities of all revenue items that are in sync with the opportunity-level win probability also change to match the opportunity-level probability.

During setup, the administrator can specify the default win probability for each sales stage.

### **What happens if I change win probability?**

If you change win probability at the opportunity level, the application updates the win probability of all opportunity revenue lines that are in sync. In addition, if you update win probability at the revenue item level, the forecast generation engine may modify the lines participating in forecasting, depending on whether the line matches forecast criteria or not.

### **How is the expected close date of an opportunity initially set?**

When defining a sales method, administrators can input the average close window of the sales method. This value is used in defaulting the expected close date of an opportunity when the sales method is specified.

### **How can I add territories to an opportunity?**

You can't explicitly add territories to an opportunity in Oracle Fusion Opportunity Management. Territories are automatically assigned by Assignment Manager (part of Oracle Fusion Work Management) to opportunity revenue lines by matching their dimensional attributes to the dimension members of the territories. The territory dimensions applicable for a revenue line are Geography, Customer Size, Sales Channel, Product, Account Type (named or not named), Industry, Organization Type, and Account Classifications.

To assign territories (for example, Prime or Overlay territories) to an opportunity, users can either schedule the batch process, Run Revenue Territory Assignment, from the scheduler page, or they can use the assign opportunity action from within an opportunity. Note that the profile option, Opportunity Assignment Mode, must be set to run territory-based assignment when using these options. If the profile option, Assignment Submission at Save Enabled, is set to yes, the application may also assign territories to an opportunity every time the record is saved.

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#### **Note**

When integrating with Oracle Fusion Partner Relationship Management, partner territories (territories whose sales channel dimension is equal to Partner) are not assigned to revenue lines. Partner organizations can only be associated with an opportunity manually, or they can be automatically associated through an approved lead registration.

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### **What's deal protection?**

With the deal protection feature, sales representatives are automatically protected from being removed from a revenue line for which they are receiving sales credit, or from the opportunity team, when territory realignment happens. Deal protection applies to sales resources that get automatically assigned to revenue items as credit recipients or to the opportunity team by the territory-based assignment feature of the assignment manager. The profile option, Resource Deal Protection Period, specifies the default number of days for which

sales representatives are protected. An opportunity team member with Full access level can override the dates for which the protection is active.

### **What's lock assignment?**

Lock assignment prevents a salesperson from being automatically removed from an opportunity through the assignment engine. Only users with Full access on the opportunity can check or uncheck the lock assignment flag for sales team members.

### **How can process steps assist the sales cycle?**

Process steps guide you through the best-practice processes that you should follow during a particular sales stage. For example, in the Discovery sales stage, your company may recommend that you interview the potential customer, develop a product list, and make a go or no-go decision on progressing the opportunity to the next sales stage.

### **What are recommended documents?**

Recommended documents give you resources that can provide coaching strategies and best practice information, among other uses. These documents can include such items as customer letter templates, relevant Web sites, and training materials.

### **What's a process step?**

Part of the Sales Coach feature and set up by the administrator, process steps are recommended procedures for sales representatives to follow during a particular sales stage to most efficiently and effectively progress the deal along to a successful outcome.

### **What's Assignment Manager?**

The Assignment Manager module of Oracle Fusion Work Management assigns sales team members to opportunities based on certain parameters. Refer to the topic, Opportunity Team Assignment: Explained, for information on the different ways you can invoke the assignment engine.

## **Manage Opportunity Assignment**

### **Opportunity Team Assignment: Explained**

Opportunity assignment occurs in one of two ways: Team members (resources) are automatically assigned to an opportunity by the Assignment Manager module (part of Oracle Fusion Work Management), or users with sufficient permissions add resources to the sales team using the Oracle Fusion Opportunity Management UI.

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#### **Note**

Only users with full access to the opportunity can enable or disable the lock assignment feature for sales team members. Lock assignment is useful for an

opportunity owner who wants to remain on the opportunity but intends to have Assignment Manager automatically assign other resources to the opportunity.

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The following sections discuss ways to assign team members to an opportunity.

### **Batch Method**

The preferred way to assign team members is using a batch process. The two processes described below can be used independently or in conjunction with one another.

- **Request Revenue Territory Assignment:** Use this process to invoke territory-based assignment on opportunity revenue lines. During this process, every revenue line in the opportunity batch is evaluated individually. Territories whose dimensions match the dimensional attributes of a given revenue line are then assigned to that line. Depending on the setting of the profile option, Territory Based Resource Assignment Style, the system will then either add the owners or all members of the assigned territories to the opportunity team.
- **Request Opportunity Resource Assignment:** Use this process to invoke rule-based assignment on an opportunity. During this process, Assignment Manager executes a set of rules, as defined in the profile option, Sales Team Member Assignment Rule Set Group, to find matching candidates for the opportunity. If matching candidates are found, they are added to the opportunity team. Note that team members for whom lock assignment is disabled will be replaced if they no longer match the assignment rules.

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### **Important**

These batch processes should not be requested to run in parallel against the same opportunity batch, to avoid potential locking issues. The scheduling service checks for such incompatibilities prior to initiating the assignment process.

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### **Manual Method**

Users with full access to an opportunity can manually assign or re-assign sales team members, including the opportunity owner. If an opportunity is re-assigned to a new owner manually, the original owner stays on the sales team as a non-primary team member, unless he is manually removed from the team.

### **Resource Recommendations**

From within the opportunity, users can select the View Recommendations action to request that the Assignment Manager retrieve sales team member recommendations based on predefined assignment rules. The user can then add candidates from the recommended list to the sales team. The system will not recommend resources that are already on the opportunity sales team.

The profile option, Sales Team Member Recommendation Rule Set Group, specifies the assignment rule set group to be used when recommending resources.

### **On-Demand Method**

From within an opportunity, sales representatives can use the assign opportunity action to invoke Assignment Manager to automatically assign, in real time,

resources to the opportunity. Based on the setting of the profile option, Opportunity Assignment Mode, Assignment Manager may invoke territory-based assignment, rule-based assignment, or both.

### **Saving an Opportunity**

If the profile option, Assignment Submission at Save Enabled, is yes, Assignment Manager will be invoked to assign the entire opportunity upon saving. Similar to the on-demand method, Assignment Manager may invoke territory-based assignment, rule-based assignment, or both based on the profile option, Opportunity Assignment Mode.

### **Territory Proposal Activation**

Following a territory proposal activation, the Oracle Fusion Sales BPEL event listener identifies changed territories and impacted opportunities and automatically assigns them. Territory-based assignment is invoked at this time to assign territories to opportunity revenue lines. Again, depending on the setting of the profile option, Territory Based Resource Assignment Style, the application either adds the owners or all members of the assigned territories to the opportunity team.

Note that territory proposal activation does not trigger rule-based assignment.

## **Using Territory-Based Assignment with Rule-Based Filtering: Example**

In this example, sales leads with sales accounts can be assigned one or more territories and supplemental lead team resources. Prospect leads can be assigned one or more resources. Assignment Manager is used to determine matching territories as well as matching resources. In Oracle Fusion Partner Relationship Management implementations, all territories (prime, overlay, partner, and so on) matching a given lead may be identified. Rule filtering may then be used to affect the type of territories (partner versus prime) that are assigned based on the value of specific attributes (for example, sales channel or deal size) on the lead.

### **Scenario**

Acme, Inc., wants to assign new leads to the correct territory and then assign them to the correct sales lead. If there is no sales channel assigned, determine if the deal should go to a partner or remain internal. If the deal is internal then only the prime territories are assigned. If the deal is pushed to a partner, a channel manager is also assigned to oversee the deal.

### **Transaction Details**

The primary marketing business objects processed by the Assignment engine are Leads. The assignment of territories is the primary means of assigning the appropriate sales people to the lead. Rule filtering may also be used to filter the territories when the sales channel is not identified. Prospect leads are processed by the assignment engine in order to identify additional resources based on the information on the leads (such as deal size)

Oracle Fusion Lead Management calls the Assignment Manager with the Work Object designated as Lead and territory as the Candidate Object with the assignment type of territory-based assignment. This determines the list of

territories. Assignment processing then calls the Rule Set Group that contains the rules for the territory-based assignment with rule filtering.

While the territory-based assignment delivers a list of territories, the rules can fine tune the assignment process:

1. Rule for SALES CHANNEL != NULL
  - a. SalesLead.Sales Channel != NULL
  - b. Action: Return matching candidates
2. RULE for SALES CHANNEL = NULL, Assign Channel Manager
  - a. Sales Lead.Sales Channel = NULL
  - b. Sales Deal.Deal SizeAttribute < 1,000,000
  - c. Territory.Territory Type In Partner, Sales Channel Manager
  - d. Action: Return matching candidates
3. RULE for SALES CHANNEL = NULL, Assign Prime
  - a. Sales Lead.Sales Channel = NULL
  - b. Sales Deal.Deal SizeAttribute > 1,000,000
  - c. Territory.Territory Type = Prime
  - d. Action: Return matching candidates

### **Analysis**

When the lead comes in, it needs to be assigned to a territory for follow up. Based on the above rules, you can determine if this is a smaller deal that can be handled by your partners (and a Sales Channel Manager to oversee), or it is a larger deal that needs to be followed up by the internal sales force.

The assignment engine first identifies the list of territories for the lead. The rules then determine who gets the deal:

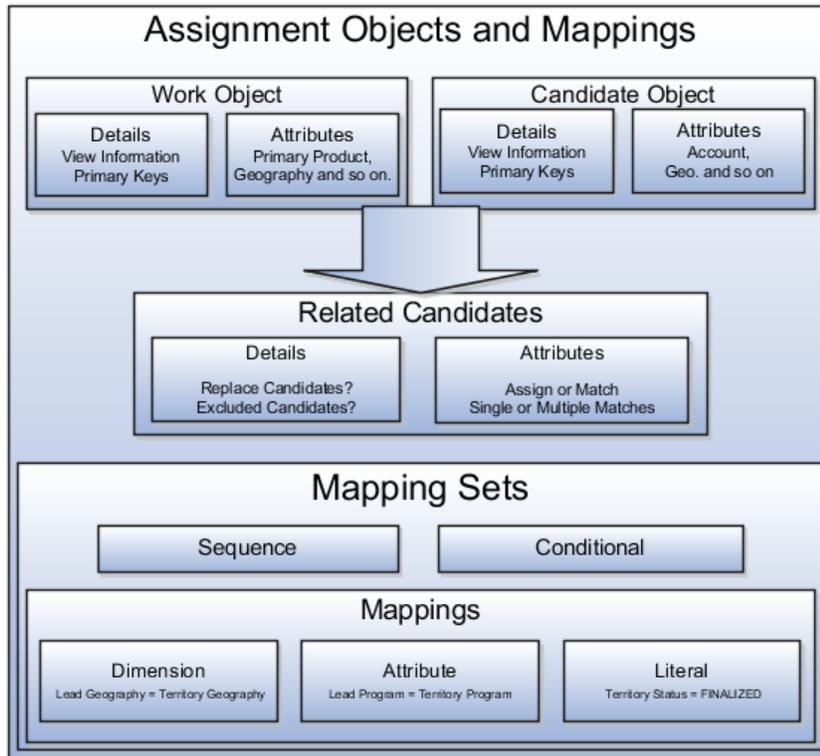
1. This first rule determines if a sales channel value exists. If it does, then all territories identified (by way of territory-based assignment) are assigned.
2. The second rule says if there is no sales channel assigned, and the deal is under one million dollars, assign the Lead to a Partner and Sales Channel Manager.
3. And the final rule is used when there is no Sales Channel value, and the deal is greater than one million dollars, the lead is assigned to the prime (internal) territories.

## **Manage Opportunity Assignment Manager Objects**

### **Assignment Object Components: How They Work Together**

The work object, candidate object, and attributes are components that fit together to create assignment objects that are used in rule-based and territory-based assignment. Work objects are business objects that require assignment, such as leads and opportunities. Candidate objects are business objects, such as resources and territories, that are assigned to work objects.

When you create candidate objects, you can select attributes for them that are later used in rules or mappings. These candidate objects also become candidates that are available for association when you create work objects. When you create work objects, you can select attributes for them also, as well as associating one or more candidates.



### Work Objects

A work object is a business object that requires assignment such as a lead or an opportunity. Creating a work object involves entering its application information, selecting its attributes to use during assignment, and associating one or more candidates.

### Candidate Objects

A candidate object is a business object, such as a resource or a territory, that is associated with one or more work objects for eventual assignment. Creating a candidate object involves entering its application information and selecting its attributes to use in rules or mappings. A special type of candidate object is a classification object. This type of candidate object does not represent a business object that gets assigned to a work object. It is used only with classification rules and is used primarily to rank or qualify leads.

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#### Note

As candidate objects are created, they become available as candidates that can be associated with one or more work objects as part of the work object creation process.

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The administrator needs to define the association between the work object and candidate object. For example, the Lead work object may have an association with both the Territory candidate object and the Resource candidate object. This implies that Assignment Manager can be used to assign Territories and Resources to a lead.

In the related Candidates tab for the Revenue work object an administrator can define the association between the work object and candidate object. For example, the revenue work object may have an association with both the territory candidate object and the credit allocation template candidate object. This association indicates that Assignment Manager can be used to assign both territories and credit allocation templates to revenue lines.

### **Related Candidates**

To relate a candidate object to a work object, use the following fields:

- **Assign Candidates:** Indicates that Assignment Manager performs the assignment. If not set, then Assignment Manager is used to find the matching candidates, which are then passed to the calling application to update the work object.
- **Custom Logic:** Indicates that Assignment Manager passes the result of the assignment matching to the callback function of the work object. For example, Opportunity Management uses custom logic that updates the sales team with the territory members. It stamps the territories onto the revenue line and adds the territory team members (resources) to the opportunity sales team.
- **Merge Assignment Candidates:** Controls whether the matching assignment candidates identified from processing each set of mappings should be merged. This is used to drive the merging of matching candidates when multiple mapping sets are used in assignment processing. If the check box is checked, then the candidates are merged. The default is unchecked.
- **Keep Manual Candidates:** Indicates that manually assigned candidates are retained during assignment processing. This option can be used to prevent the removal of manually added candidates during reassignment. Sales Account and Opportunity Management have implemented their own lock assignment features.
- **Replace Candidates:** Determines whether unqualified candidates are removed from a team when an assignment runs. For example, the first time that Assignment Manager runs, a territory is assigned to a sales lead. When the reassignment process runs following a territory proposal activation, the territory is no longer valid. If Replace Candidates is set, then the territory is removed from the sales lead.
- **Candidate Exclusion:** Sales leads have a related object, which stores the excluded candidates for each sales lead. Assignment Manager accesses this information, which prevents assignment of the work object to an excluded candidate.

- **Parent Attribute:** Used by territory based assignment to determine the hierarchy of matching territories, eliminate all parent territories, and only return and assign the matching leaf node Territories. If this attribute is not used, then all matching territories (parent or leaf ) are returned and assigned.
- **Candidate Differentiation Attribute:** Stores the attribute on the candidate object that is used for discriminating matching candidates. For example, in Revenue line assignment, this attribute enables matching leaf territories of many territory types (such as Prime, Channel Sales Manager, and so on) to be assigned. The Candidate Discriminator Attribute is only relevant for territory-based assignment and can only be selected if a parent attribute has been selected.
- **Coverage Attribute:** The territory attribute used to denote whether the candidate in the matching candidate list has a regular, included, or excluded coverage.
- **Maximum Number of Candidates:** The maximum number of candidates returned for the work object and candidate object combination. The default value is 100.
- **Manual Attributes:** The attribute that identifies a candidate was manually assigned, rather than by the system. This attribute is used with the Keep Manual Candidates attribute.
- **Keep Manual Candidates:** A flag to retain manually assigned candidates when assigning or re-assigning a work object. This option is only relevant if the manual attribute is defined and the Assigned Candidates option is checked.

**Replace Candidates:** Indicates whether non matching candidates will be removed when re-assigning a work object. In an example scenario, in the first time assignment runs, territory A is assigned to a sales lead and there is a change within the territory definition. When the sales lead is reassigned, territory A is no longer valid. If this option was selected, then territory A is removed from the sales lead.

- **Score Attribute:** The score attribute in which the calculated score is stored.
- **System Attribute:** The attribute that identifies a candidate was assigned by the system, rather than manually.

## Selecting Attributes

Attributes are elements in the view object defined for an assignment object. For each assignment object, you can select one or more attributes that you want to use when configuring assignment rules or mappings. For example, for a work object like sales account, you might choose the attributes of Named Account Flag, Customer Size, and Organization Type. When you configure assignment mappings for the sales account work object, your chosen attributes are available. You could create a mapping for Sales Account using the Named Account Flag attribute.

When selecting attributes for a candidate object, you will not only select the attributes you want to use when configuring assignment rules and mappings that involve that candidate object, but you also want to select the attributes

for that candidate object that you want to appear in the screen that displays recommended candidates after assignment manager is run. For example, if a candidate object is resource (sales representative), and you want to show sales representatives' first names, last names, and phone numbers when they are recommended during assignment processing, you need to select the attributes for the resource candidate object that correspond to first name, last name, and phone number, and specify the order in which these attributes appear in the recommended candidates screen.

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**Note**

This feature is not used by any CRM applications at this time.

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### **Adding an Assignment Object**

The Manage Assignment Objects pages enable you to define and edit the Work and Candidate objects as well as define any territory-based mappings. The figure above shows the relationship between the work and candidate objects and the mapping of the matching candidates to work objects.

When you add or edit a work or candidate object there are several key pieces of information that are required in the definition:

- **Name:** a unique name for the object with an optional description.
- **Code:** a unique code used in processing the object.
- **Work/Candidate Object check boxes:** indicates if the object is a work object, candidate object or both.
- **Application Module:** an Oracle Application Development Framework (ADF) business component that encapsulates the business service methods and UI-aware data model for a logical unit of work related to an end-user task. Enter the fully qualified definition name of the consumer application, Application Module. Valid for top level Work and Candidate objects. Child objects automatically inherit this value from its parent.
- **Application Module configuration:** Valid for Top Level Work and Candidate objects except Classification Candidate objects. Child objects will automatically inherit this value from its parent.
- **View Object Instance:** used to define the data model of a view object component when designing an application module, for example, Opportunity. Valid for all levels of Work and Candidate objects except Classification Candidate objects.
  - **View Criteria** may be defined to filter the information for the rows of a view object collection. Valid for top level Work and Candidate objects except Classification Candidate objects.
- **Primary Key Attribute 1:** First or only attribute that makes up the object primary key. Valid for top level Work and Candidate objects except Classification Candidate objects.
- **Refresh Interval:** the number of minutes between refreshes of candidate object data. The default setting is 0 minutes. Valid for top level Candidate objects except Classification Candidate objects.

- **Initial Caches:** The initial size of the cache when processing an object. This value will be used the first time the engine processes objects or following a server bounce. The default value is 2, and the maximum value is 20. Only valid for top level Candidate objects except Classification Candidate objects. All Work Objects that are used for scoring, Lead, for example, use the Product Level (MOW\_SCORING\_INITIAL\_CACHES) Initial caches for scoring rules profile option value.
- **Maximum Caches:** The maximum size of the pool/cache when processing the object. The default value is 5, and the maximum value is 25. Only valid for top level Candidate objects.

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**Note**

All Work Objects that are used for scoring, Lead for example, use the Product Level (MOW\_SCORING\_MAX\_CACHES) Maximum caches for scoring rules profile option value.

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- **Score Attribute:** The attribute on the object that stores the total calculated score after an assignment request has been processed. Valid for top level Work objects only.
- **Assignment Date Attribute:** The attribute on the object that stores the assignment date after an assignment request has been processed. Valid for top level Work objects.
- **Exclude Assignment Attribute:** The attribute on the object that stores the setting for excluding a work object from assignment. Valid for top level Work objects.

### **Adding Assignment Object Attributes**

Assignment Manager allows users to specify a set of attributes from the assignment object VO to be used during the assignment evaluation. The assignment engine will load these Assignment Object Attributes for each assignment object VO row, in addition to any primary key or assignment attributes. This is designed to improve performance by not loading those attributes not used for the assignment evaluation.

Assignment Object Attributes should be defined for each work object and any child objects as well as each candidate object to be used by the Assignment Engine.

- **View Object Attribute:** Name of each attribute in the view object defined for the assignment object. Assignment Rules or Mappings can be configured using these attributes. For Candidates Objects, the attributes that appear in the interactive assignment UI should also be selected.
- **Candidate Information Sequence:** The sequence that this attribute is displayed in the Interactive Assignment UI.

### **Setting Up Assignment Mappings**

Assignment mappings drive territory-based assignments. These mappings identify the dimensions, attributes, and territory filtering used in territory-based assignment processing. A default set of mappings is seeded. This seeding

assumes that opportunities, leads, and sales accounts use the same territory hierarchy.

Assignment Manager has an indicator in the related **Candidates** region to control whether to merge the matching assignment candidates identified from processing each set of mappings. This indicator is used to drive the merging of matching candidates when multiple mapping sets are used in assignment processing. If the box is checked, then the candidates are merged. The default is unchecked.

You can use the following assignment mappings:

- **Attribute Mapping:** An example is assigning territories to a sales lead where the territory program ID is the same as the sales lead program ID. In this case, the territory is matched when the territory program ID is equal to the sales lead attribute program ID.
- **Dimension Mapping:** An example is assigning territories to opportunity revenue lines based on the product associated with the revenue line. In this case, the product dimension is selected as the mapping type. The candidate object low attribute and high attribute correspond to the names of the low sequence and high sequence attributes for product on the territory. The work object low attribute and high attribute correspond to the names of the low sequence and high sequence attributes for product on the revenue line.
- **Mapping using alternative attributes:** Using the same scenario, if a revenue line does not have a product assigned to it, but has a product group assigned, add the low sequence and high sequence attributes for product group are entered for the work object alternate low and high attributes.
- **Mapping using default values:** Using the same scenario, if the low sequence and high sequence attributes for product on a specific revenue line do not contain values, then the low and high default values for the product attribute for all revenue lines are used.
- **Literal Mapping:** A way of filtering the matched territories based on specific values of a territory attribute. For example, by only matching with territories that are finalized, territory status equals FINALIZED.

## Configuring Assignment Manager: Critical Choices

Assignment is the process for selecting a candidate as an object and executing the association to a work object. Assignment consists of two phases. The first phase is the matching phase, where matching rules or mappings are evaluated to find the right assignees from a list of possible candidates. The second phase is the disposition phase, where the disposition, or assignment, of matching candidates is handled. Assignment Manager is the tool used to establish the business objects that require assignment, and to create the rules and mappings that dictate the selection and assignment of resources and territories. Candidates are potential assignees for a work object. A work object is a representation of an application business object inside Assignment Manager. A work object captures the attributes of a business object and associated child objects to be used for matching purpose. To best plan the configuration of Assignment Manager, you should consider the following points:

- Business objects
- Attributes
- Resources and territories
- Assignment disposition
- Mappings sets and mappings
- Rules

## **Business Objects**

A business object is a data entity or a collection of data treated as a unit, such as a sales account, an opportunity, or a lead. Any business object that requires the assignment to act upon it is considered a work object by Assignment Manager. The work object is a representation of the business object, and mappings and rules are developed to ensure timely and accurate assignment of candidates (for example, territories or resources) to those work objects. When configuring Assignment Manager, carefully consider which of your business objects require assignment, and create work objects only for those that do.

A set of business or assignment objects is seeded for the assignment of territories or resources to sales accounts, opportunities, and leads.

## **Assignment Disposition**

After you determine the business objects (work objects) that require assignment and the candidate objects that you will assign to them, you must decide how the matching candidate assignment disposition will be carried out. Consider these questions:

- Do you want to assign a single resource or multiple resources?
- Do you want to automatically assign matching candidates or run custom logic against matching candidates?
- Do you want to record the matching candidate score on the work object?
- Do you want to retain manually assigned candidates when assignments are processed?
- Do you want to replace disqualified candidates when assignments are processed?

## **Attributes**

To ensure that candidates are properly assigned to work objects, create mappings and rules. These mappings and rules employ attributes to determine the best assignments. As you set up work objects and candidate objects in Assignment Manager, also select the attributes of those objects that you want to use in your mappings and rules. For example, you might want to assign a resource such as a specific sales representative to a business object, such as opportunity, based on the risk level of the opportunity. In this case, when you create the opportunity work object and the sales representative candidate object, you will select the attribute of opportunity that corresponds with risk level, and the attribute of the sales representative that corresponds with skill name or e-mail address. Selecting

these attributes makes them available for mappings and for conditions on your rules, so ensure that you select the attributes that reflect the criteria that you want to use for matching candidate objects to work objects.

## **Mappings Sets and Mappings**

Assignment mapping sets and their related mappings drive territory-based assignment. The mapping sets determine the sequence of mappings and which mappings are used in territory-based assignment. The mappings identify the dimensions, attributes, and territory filtering used in the assignment processing. Default mapping sets and their related mappings are seeded. This seeding assumes that opportunities, leads, and sales accounts use the same territory hierarchy.

Create the mappings using the work objects, candidate objects, and attributes that you already established. When designing your mappings, carefully consider the dimensions and attributes you use in your territory structure and how you want to match these territory candidates to work objects.

## **Rules**

Rules are defined for the execution of rule-based assignment. Rules are designed to return candidates based on whether these candidates match a set of criteria, are within a defined scoring range, or are of a specific classification.

Create the rules using the work objects, candidate objects, and attributes that you already established. When designing your rules, carefully consider how you want to match candidates to work objects. For example, would you want resources assigned based on their geographic location, their product knowledge, on the status or score of an object, or a combination of any of these attributes? Do you want to match candidates only, or would you like to match candidates and score them? In a multiple-candidate scenario, do you want to assign all matching candidates or only those who achieve higher than a specific score? Consider these questions before creating rules.

## **Creating Assignment Mappings: Examples**

For territory-based assignment, you create work-object-to-candidate-object mappings during assignment object creation. These mappings are used to make candidate assignments. You can create multiple types of mappings for assignments. The following scenarios illustrate these different mappings:

- Creating an attribute mapping
- Creating a dimension mapping
- Creating a literal mapping

### **Creating an Attribute Mapping**

You want to assign territories to a sales lead when the territory program ID is the same as the sales lead program ID. Create a mapping where the work object is sales lead and the candidate object is sales lead territory. Select the territory when the attribute territory program ID is equal to the sales lead attribute program ID.

Another example would be if you want to assign territories to a sales lead based when the territory manual account inclusion or exclusion is the same as the account on the sales lead. Create a mapping where the work object is sales lead and the candidate object is sales lead territory. Match the territory when the territory attribute account node integration (AccountNodeIntgId) ID is equal to the sales lead attribute party ID.

### Creating a Dimension Mapping

You want to assign territories to opportunity revenue lines based on the product associated with the revenue line. Create a mapping where the work object is opportunity revenue line, and the candidate object is territory. Select the product dimension as the mapping type. The candidate object low and high attributes correspond to the names of the low sequence and high sequence attributes for product on the territory. The work object low and high attributes correspond to the names of the low sequence and high sequence attributes for product on the revenue line. For example, the low sequence attribute for product on the revenue line might be called `ProdSeqLow`.

- Mapping using alternative attributes: Using the same scenario of assigning territories to opportunity revenue lines based on the product associated with the revenue line, you might encounter a situation where a revenue line does not have a product assigned to it, but it does have a product group assigned to it. Create the same mapping that you created for the dimension mapping scenario, and add the names of the low sequence and high sequence attributes for product group for the work object alternate low and high attributes. For example, the alternate low sequence attribute for product group on the revenue line might be called `ProdGrpSeqLow`.
- Mapping using default values: Using the same scenario of assigning territories to opportunity revenue lines based on the product associated with the revenue line, you might encounter a situation where the low sequence and high sequence attributes for product on a revenue line do not contain values when assignments are processed. Create the same mapping that you created for the dimension mapping scenario, and add low and high default values for the product attribute for revenue lines.

### Creating a Literal Mapping

Literal mappings are a way of filtering the matched territories based on specific values of a territory attribute. You want to find only territories that are finalized (for example, territory status equals FINALIZED).

## Disposition Logic: How It Is Processed

Assignment Manager, a part of Oracle Fusion Management of Work, uses a two-step process to assign candidates. The first step is the selection of Candidates with the Assignment Manager application. Candidates to be assigned to the work object are determined by territory-based mapping, rule-based assignment, or territory-based mapping with rule-based filtering.

Disposition is the second step. The selected candidates are written to the work object table or the work object child table based on the selected disposition logic. This has several possible outcomes, but it is based on two principal

logic features. The first is the delivered Assign Candidate logic. The second is Run Custom Logic, a way for you to define the assignment disposition of the candidate object. For example, you may want to e-mail a specific list of candidates, or write the selected candidates to a specific table. Run Custom Logic can be used in conjunction with the Assign Candidate logic.

## Settings That Affect Disposition

By designating Assign Candidate, Assignment Manager can work with one or multiple candidates that have been returned in the selection process.

- **Single Candidate Returned:** Assignment Manager writes the candidate back to the work object table based on the primary key attribute fields that you must enter for that work object table.
- **Multiple Candidates Returned:** A work object child table is designated to record these candidates. Then you indicate at least one and up to three attributes that serve as the primary key fields. There are two choices for how to write the resulting candidates, Replace Candidates and Keep Manual Candidates.
  - **Replace Candidates:** When the Assign Candidates logic is run, the results are compared to any results already in the work object child table. If Replace Candidates is checked, any existing candidates are removed and replaced with the new results. No manually entered candidates will be affected.
  - **Keep Manual Candidates:** Some applications using Assignment Manager allow manual entry of candidates. When a candidate is entered manually, there is an attribute that indicates manual entry that is set to Y or Yes. When Keep Manual Candidates is checked and the manual attribute indicated, Assign Candidates logic will disregard these candidates when writing to the work object child table.

Selecting Run Custom Logic allows you to develop your own code to perform specific actions on or with the candidates that are returned from the selection process. When this option is chosen, after the selection process, Assignment Manager will use a callback function in the application module which will call your custom logic code and pass on the information received from the selection process.

## How Disposition Logic Is Processed

Assignment manager selects the candidates and then passes in the results from the selection phase to either the assign candidate or custom logic or both.

If you check both Run Customer Logic and Assign Candidates on the user interface, the assignment engine will invoke the Assign Candidates logic first and then execute the Custom logic.

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### Note

If you are using credit allocation templates in Oracle Fusion Opportunity Management, you may wish to leave both Run Custom Logic and Assign Candidate unchecked. Opportunity Management uses Assignment Manager to find matching credit allocation templates. In this process, Assignment Manager passes the template IDs back to Opportunity Management which does the

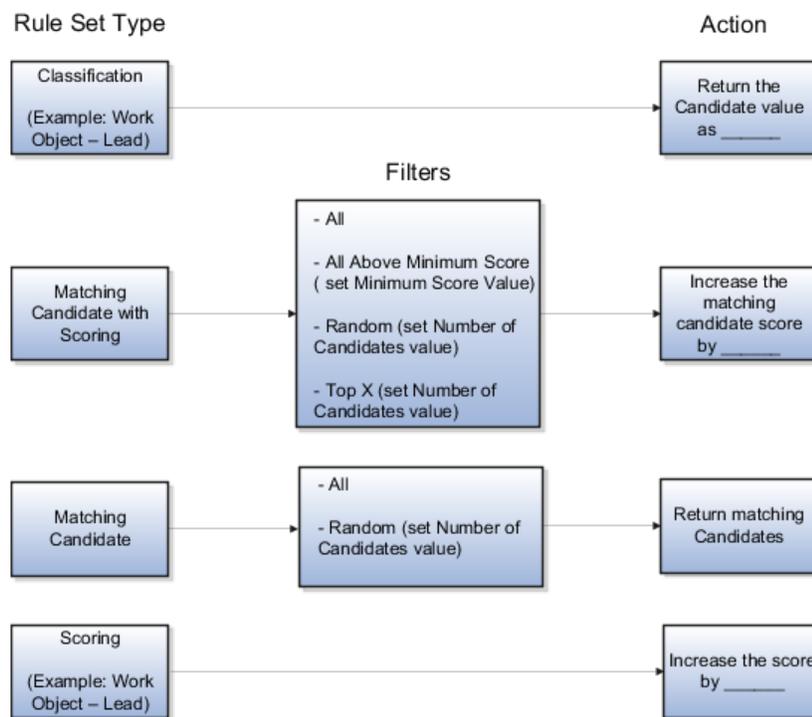
assignment. No custom logic is involved and Assignment Manager does not perform the assignment.

## Manage Opportunity Assignment Manager Rules

### Rule Set Components: How They Work Together

The rule set type, filter settings, and rule action are rule set components that work together to tell the assignment manager engine how to process rule-based assignments for work objects.

A rule set type is set at the rule set level; and two of the rule set types, Matching Candidate with Scoring and Matching Candidate, require additional filter settings. At the rule level within a rule set, an action setting is entered that determines the action that is performed when a rule is evaluated as true. The rule action works in conjunction with the rule set type.



### Rule Set Type

The rule set type on the rule set determines the type of rule-based assignment processing to be performed. For example, when the rule set type is Matching Candidate, the candidates that match the conditions of the rules evaluated as true by the assignment engine are assigned to the work object. The number of

matching candidates that are assigned to the work object is determined by the rule set filter settings.

### **Filter Settings**

The filter settings are used in conjunction with two of the rule set types: Matching Candidate and Matching Candidate with Scoring. The filters allow you to indicate how many matching candidates you want to assign to the work object. When set to All Above Minimum Score, all of the matching candidates above a particular score are assigned to the work object. Set the score in the Minimum Score field.

When set to Top X, a number of matching candidates with the highest scores are assigned to the work object. Use the Number of Candidates field to specify how many top matching candidates to assign.

When the rule set type is Matching Candidate, and the filter is set to Random, a random selection of matching candidates are assigned to the work object. When the rule set type is Matching Candidate with Scoring, and the filter is set to Random, a random selection of matching candidates with the highest scores are assigned to the work object. Use the Number of Candidates field to specify how many random matching candidates to assign.

### **Action**

The action setting determines the action that is performed when a rule is evaluated as true. The action setting is the one component that is set at the rule level rather than the rule set level; however, it does work in conjunction with the rule set type. When the rule set type is Classification, the rule action can only be Return the Candidate value as <value>. For example, the work object for a rule set is Lead, and the candidate object is a classification object called Lead Qualification. The rule set type is set to Classification, and the action for one of the rules in that set is Return the candidate value as QUALIFIED. If that rule is evaluated as true, the Lead Status for the Lead being classified is set to Qualified.

When the rule set type is Matching Candidate, the rule action can only be Return matching candidates. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule are assigned. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or a random number of matching candidates are assigned (Random).

When the rule set type is Matching Candidate with Scoring, the rule action can only be Increase the matching candidate score by <value>. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule get the value in the action added to their score. For example, the work object for a rule set is Opportunity, and the candidate object is Resources. The rule set type is set to Matching Candidate with Scoring, and the action for one of the rules in that set is Increase the matching candidate score by 10. If that rule is evaluated as true, the resources that match the conditions for that rule get 10 added to their scores. The scores are cumulative, so if any of the resources that matched the conditions in the rule in the example also match the conditions for other true rules in the set, those territories get additional values added to their current score of 10. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or all matching candidates above a specified score are assigned (All Above Minimum Score), or a random selection of matching candidates with the highest scores are assigned (Random), or a number of matching candidates with the highest scores are assigned (Top X).

When the rule set type is Scoring, the rule action can only be Increase the score by <value>. If a rule with that action is evaluated as true, the value in the action is added to the score of the work object associated with the rule set. For example, the work object for a rule set is Lead. The rule set type is set to Scoring, and the action for one of the rules in that set is Increase the score by 20. If that rule is evaluated as true, the score for the Lead is increased by 20.

## FAQs for Manage Opportunity Assignment

### What's Assignment Manager?

The Assignment Manager module of Oracle Fusion Work Management assigns sales team members to opportunities based on certain parameters. Refer to the topic, Opportunity Team Assignment: Explained, for information on the different ways you can invoke the assignment engine.

### How can I exclude a candidate from an assignment?

You can exclude candidates during the assignment process by navigating to the Candidates tab. Scrolling down the section Exclude Candidates. Enter the View Object that controls which candidates are to be excluded and enter the selection criteria for up to three key fields.

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#### Note

The application using Assignment Manager needs to support a View Object that controls which candidates are to be excluded in order to use this feature.

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### How can I identify a Classification candidate object?

Enter the word Classification in the Application Module field. This will create a candidate object that you can use when setting up classification-type rules; for example, rules that qualify or rank leads.

### What happens if I mark an assignment object or one of its attributes as inactive?

When the assignment object inactive box is checked the selected work or candidate assignment object is not available for assignment processing. When the assignment attribute inactive box is checked the selected work or candidate object attribute is not available for assignment processing.

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#### Note

The object or attribute cannot be set to inactive if there is a mapping set, mapping, or rule defined using the object or attribute.

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### What's the difference between literal, dimension, and attribute mapping?

Dimension Mapping: Dimension mapping should be used when the work object and candidate object attributes in the comparison are dimension attributes, such as Geography, Product, or Account. When creating the mapping, use

the **Function Code** field to specify a unique identifier for the dimension. This identifier is passed to the translation function, in case the same function is used for multiple dimensions.

**Attribute Mapping:** This mapping enables you to compare and match attribute values between a work object attribute and a candidate object attribute. When the value of the candidate object attribute matches the work object attribute the candidate is selected. Attribute mappings should be used when the work object and candidate object attributes in the comparison are non-dimensional attributes. For example, consider a lead work object with a program ID attribute and the territory object with program ID attribute. The selection criterion is:  
`select Sales Lead Territories where Sales Lead Territory.ProgramID equals Sales Lead.LeadProgramID`  
The assignment engine will use this mapping data to construct a query on the candidate object that is equivalent to the selection criteria. When creating the mapping, the Function Service and Function Code are only needed if a translations function is used. The function code field is used to specify a unique identifier for the attribute, and this identifier is passed to the translation function.

**Literal Mapping:** Literal Mapping is used almost exclusively to filter the candidate objects. This form of mapping enables the comparison of candidate attributes against a specific value chosen by the user. The assignment engine will compare the mapped candidate object attribute against the specified literal value. For example, select the Territory Candidate object that has the attribute `TerrStatusCode` that equals the value `FINALIZED`.

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#### Note

For Literal Mappings ensure that the value entered corresponds to the Lookup Type Value code, not the meaning.

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### What's the difference between rule-based and territory-based assignment?

Territory-based assignment is the primary means of assignment for CRM objects. For territory-based assignment, you create work object to candidate object mapping sets during assignment object creation that are used to make candidate assignments.

Rule-based assignment is used for identifying supplemental resources or filtering the matching territories. Rules can also be used for scoring work objects and also for classification. For rule-based assignment, you use the rules editor to create expression-based rules that the assignment engine uses to make candidate assignments.

Territory plays a fundamental role in Fusion CRM. Using attributes it defines how a company is going to market. That is, how is that company deciding to deploy its Sales Resources to sell to Customers? Every Sales Account, Lead, and Opportunity has a territory or territories assigned. In many cases, customers will implement Territories down to the level of individual Sales Representative

(that is, each Sales Representative will have his or her own Territory) in order to enable these capabilities at the granularity that they want, as well as the Sales Planning/Territory Alignment capabilities at the granularity that they want.

In a territory-based assignment scenario, you typically create a mapping set between a work object and a candidate object to make the appropriate candidate assignment. This mapping set can consist of 1 or more mappings between the work object attributes and the candidate object attributes.

A simple example territory-based assignment setup is a single mapping set between the opportunity revenue line work object and the candidate object of territory. This mapping set contains a single mapping which maps the attribute of location on the opportunity (the parent of the revenue line) to the geography attribute on the territory. Any territories where the geography value matches the location of the parent opportunity are matched and assigned to that opportunity revenue line. Another example would be two mapping sets defined between the lead work object and the territory candidate object. The first mapping set determines the assignment of territories to each lead based on a mapping between the industry of the customer on the lead and the territory industry dimension. This would be a literal mapping that filters the territories to those that have a status of finalized and a literal mapping that filters the territories to those that have a sales centric coverage model. The second mapping set is conditional and determines the assignment of partner channel manager territories. This mapping set consists of a mapping between the geography of the primary partner on the lead and the territory geography dimension. This would be a literal mapping that filters the territories to those that have a status of finalized and a literal mapping that filters the territories to those that have a partner centric coverage model.

In a rule-based assignment scenario, you create rules with conditions that need to be met in order to make the appropriate candidate assignments. For example, a rule is created with the condition that the candidate object (resource) has a product skill rating that is greater than or equal to intermediate in order to be matched to the work object and be assigned.

The following chart compares the features and pros and cons of territory-based assignment and rule-based assignment:

Territory-Based Assignment	Rules-Based Assignment
<p>Pros:</p> <ul style="list-style-type: none"> <li>• User-friendly territory management</li> <li>• Minimal assignment configuration</li> <li>• Support for hierarchies</li> <li>• Preview of assignment</li> <li>• Reports to identify gaps and overlaps</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• Additional administration required even with simple territory models</li> <li>• Single territory structure for CRM</li> </ul>	<p>Pros:</p> <ul style="list-style-type: none"> <li>• Familiar concept with expression-based rules</li> <li>• Any attribute can drive an assignment</li> <li>• Easy to define and maintain a small number of straightforward rules</li> <li>• Scoring and classification</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• Unable to navigate hierarchies</li> <li>• Requires intensive effort to manage complex or large numbers of rule</li> </ul>

## FAQs for Assess Opportunity

### What are task templates?

Task templates provide a list of required or recommended tasks relevant to the particular sales stage.

### What are assessment templates?

Assessment templates enable you to evaluate the health of a particular business object, such as an opportunity product, an opportunity competitor, or an opportunity overall. An assessment template consists of a set of weighted questions and possible responses that are scored. After selecting the appropriate assessment type, you enter responses for all the questions in an assessment template, and achieve a score once the assessment is submitted. This score is used to evaluate the health of the business object. For example, the score could help determine the success rate of the parent opportunity.

## Manage Sales Revenue

### Manage Sales Revenue: Overview

Sales revenue reflects the potential income of a company. The ability to manage sales revenue effectively is an important aspect of managing opportunities. Companies use opportunity revenue data to analyze their sales pipelines and win/loss trends, manage the performance of their resources, and generate revenue forecasts.

Oracle Fusion Opportunity Management provides robust capabilities for managing sales revenue. Available within the edit screens of an opportunity, the UI for managing sales revenue is easy-to-use and multi-featured. Typical sales representative tasks within the revenue UI might include:

- Adding to an opportunity products and product groups the customer is interested in, either through the sales catalog (if integrated) or by selecting directly from inventory
- Entering revenue amounts for items (generally, units multiplied by price), which then become projected revenue
- Setting revenue line item attributes, such as forecast inclusion, price, quantity, close date, and win probability
- Managing recurring revenue items, such as services or training plans
- Allocating and managing the sales credit amounts that opportunity team members receive
- Mass updating revenue lines, a feature that allows sales representatives to select multiple revenue lines in an opportunity and apply common changes across all of them using a single screen

## Revenue Line Items: Explained

Once you add them to an opportunity, products or product groups are known as opportunity revenue line items.

Revenue line items are comprised of key attributes:

- Products that the customer is interested in purchasing
- Pricing information such as quantity, unit of measure, unit price (also known as estimated price), and revenue
- Opportunity close date
- Win probability for the sale
- Forecasting attributes

The revenue amounts of revenue lines are summed up or rolled up to the summary revenue, which is displayed at the opportunity header level.

### Revenue Item Pricing Fields

In the opportunity UI, you can enter the quantity, estimated price (unit price), and revenue amount for a revenue line item. When you add a product or product group to an opportunity, you can add a quantity and an estimated price. The application multiplies estimated price by quantity. You also can enter the amount directly.

Note: When you update the revenue amount, the application does not update the quantity or estimated price for the revenue line item.

## Working with Opportunity Revenue: Explained

Oracle Fusion Opportunity Management provides a robust interface that allows sales representatives to manage and track sales revenue. This topic discusses the main features of the revenue UI.

### Using the Revenue Region

Use the Revenue region within the edit opportunity UI to add, remove, and manage revenue items.

To add a revenue item, add a row in the revenue table. Select either an item or a group in the product area of the table. If selecting a group, add a product group from the list of product group names. If selecting an item (single product), add the product from the list of products. To select product groups or individual product items from the sales catalog, browse the sales catalog, find the desired group or item, and add as a line in the revenue table. Alter the other editable fields as desired. Note the following about the field behavior:

- Close Date: Indicates the expected close date of the revenue item; initial value is the opportunity-level close date

- **Forecast:** Displays a check mark if the revenue item matches forecast criteria. Updated as soon as any of the following attributes are changed, without waiting for the you to save the record: Product Group, Quantity, Estimated Price, Revenue, Win Probability, Revenue Type, Expected Revenue, and Status.
- **Product:** For Type, select either Item or Group, then select associated group or product (see Product Selection, below, for more information)
- **Quantity:** Initial value is null or zero
- **Estimated Price:** Users can enter an estimated price, or deploying companies can use an external pricing engine
- **UOM:** Initial value based on product or product group selected; application picks the first UOM for the item in the list
- **Revenue:** If not overridden, application multiplies price by quantity
- **Currency:** Initial value is the opportunity-level currency
- **Status:** Initial value is in a category meaning Open; application picks the first status, alphabetically, belonging to the category
- **Win Probability:** Initial value is the opportunity-level win probability
- **Best Case (Revenue):** Initial value is revenue for the item or group (providing Revenue is greater than Best Case)
- **Worst Case (Revenue):** Initial value is null
- **Sales Channel:** Sales channel from which the opportunity originated; typically Direct or Indirect
- **Include in Forecast:** Initially set to When matches forecast criteria, but can be overridden to Always or Never
- **Lock Owner:** Checked value means revenue owner cannot be reassigned during territory realignment, nor does deal protection apply
- **Partner:** Organization participating in the sales effort for the revenue line
- **Territory:** Displays automatically assigned territories matching the product dimension
- **Competitor:** Initial value is null
- **Reason:** Used to enter reason sale was lost
- **Actual Close Date:** Read-only field set by the application automatically when user sets the status to a closed status.

### **Product Selection**

Product selection enables you to sell the right product to the right customer. Organizations with an extensive portfolio of products that cater to the diverse requirements of their customers need highly targeted products for competitive advantage. The ultimate aim is to take the guesswork out of product selection, allowing you to select products in an informed way.

With Oracle Fusion Opportunity Management, you choose products using one of two methods:

- **Product or product group selector:** When you know the exact product to sell, select the product using the product selector. If you don't know the exact product to sell, select a product group using the product group selector, without selecting a product. The product selector is a flat list of products, without any hierarchal or tree navigation. You can search for products based on product name and description. You can drill down on a product name to view additional information about a product. By default, the product group selector displays the same set of product groups available in the sales catalog.
- **Sales catalog:** In addition, you can browse the sales catalog to learn product details, search for products, or compare products. For more information on the sales catalog, see Oracle Fusion documentation for the sales catalog.

All of the product selection mechanisms listed here are integrated with eligibility rules, if implemented. Eligibility rules ensure that sales representatives only offer the products that the customer is eligible to purchase.

Specifying a product on a revenue item is optional. During an early sales stage, you may not know the exact product to sell. However, you must specify either the product or the product group on a revenue line item. The application raises an error message if either one of these attributes is missing. The application does not allow specifying both product and product group on revenue items.

### **Adding Multiple Products at Once**

You can add multiple products at once by selecting several products in the product selector and adding them to the revenue region.

Products are only committed to the database when you save or close the opportunity.

You can filter the product selector to only display product items or product groups within your sales territory.

### **Entering Quantity, Estimated Price, and Revenue**

You can enter the quantity, estimated price (also known as unit price), or revenue amount for a revenue line item. For automatic pricing, deploying organizations can integrate with an external pricing system.

The application determines the revenue amount by multiplying estimated price by quantity. You can change the default revenue amount; when you do, the application does not update the quantity or estimated price for the revenue line item.

### **Specifying Product Unit of Measure**

Typically, you specify the unit of measure (UOM) for a product sold on a revenue line. For example, a product may be charged per minute, per day, or per case.

When you choose a product from product selector or the sales catalog, the application automatically enters the default UOM for the item. You can,

however, enter a different UOM. When you do so, the application does not update the quantity or estimated price associated with the product.

The UOM list of values displays only the UOMs applicable for the product.

### **Product Eligibility**

The product and product group selectors enforce eligibility rules that help you sell only the products that customers are eligible to purchase. For example, you cannot sell a wireless plan that is not available in the customer's geographical area. Depending upon your company's implementation, you may or may not be able to see ineligible products in the UI.

## **Assigning Sales Credits: Explained**

Companies use sales credit assignment to report on salesperson performance and quota attainment, to aid in factoring sales compensation calculation, and to facilitate sales forecasting by territories. Sales credit recipients and revenue amounts roll up the resource hierarchy for pipeline reporting and quota attainment.

Sales credits can be manually entered against a revenue line using the Assign Sales Credits dialog windows, or automatically generated using credit allocation templates. When a revenue line is first created, the application always defaults the revenue line creator as the 100-percent revenue sales credits recipient.

### **Revenue Sales Credits**

When assigning revenue sales credits, keep in mind the following:

- Only internal resources are eligible as revenue credit recipients.
- Revenue sales credits must add up to 100 percent.
- The Forecast Territory can be set to any territory assigned to the revenue line with Revenue or Revenue and Nonrevenue Forecast Participation.

### **Nonrevenue Sales Credits**

When assigning nonrevenue sales credits, keep in mind the following:

- Both internal and external (for example, partner) resources are eligible as nonrevenue credit recipients.
- Nonrevenue sales credits do not need to add up to 100 percent.
- If the selected Allocation Style is Proportional to Revenue, the sales credit amounts adjust automatically and proportionally when the revenue line amount changes.
- If the selected Allocation Style is Ad Hoc Amounts the sales credit amounts do not change with revenue line amount changes.
- The Forecast Territory can be set to any territory assigned to the revenue line with Nonrevenue or Revenue and Nonrevenue Forecast Participation.

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### **Note**

Note: Territories with a Forecast Participation of Nonforecast are not eligible to be set as the forecast territory on either revenue or nonrevenue sales credits.

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## Sales Credit Recipient and Forecast Territory Defaulting Logic: Explained

The application follows defaulting rules for populating sales credit recipients and forecast territory information. This topic explains these defaulting rules.

When a revenue line is first created, the application sets the revenue line creator as the sales credits recipient at 100 percent. You can edit the default credit allocation, and you can add additional revenue recipients as needed. Nonrevenue credit recipients are never set by default, unless through a credit allocation template), and must be added manually.

After opportunity assignment is run, the application processes the existing credit allocations for each assigned revenue line to make sure that only an eligible territory is set as the forecast territory, and that the credit recipient is an eligible resource from the forecast territory. This process is important because the revenue or nonrevenue sales credit amounts are automatically rolled into the territory's forecast when the revenue line is flagged as forecasted.

### Default Forecast Territory Logic

Generally, in setting default forecast territory, the application uses the following logic:

- Keep the user-selected forecast territory as long as it is still assigned to the revenue line and its Forecast Participation matches the sales credit type.
- Use the existing credit recipient to derive the forecast territory whenever possible.
- Territories with a Forecast Participation of Revenue, Nonrevenue, and Revenue and Nonrevenue are treated equally in the defaulting logic.

More specifically, the application uses the following logic when setting default forecast territory:

- If the current forecast territory for the sales credit is one of the assigned territories with a matching Forecast Participation, the application leaves it unchanged.
- If there is only one territory with a matching Forecast Participation Type, the application sets that territory as the forecast territory.
- When there are multiple territories with a matching Forecast Participation, the application chooses the forecast territory using the following precedence:
  - Territory where the existing credit recipient is the owner
  - Territory where the existing credit recipient is a member

- Territory with a matching Forecast Participation with the latest effective start date
- When there is no matching territory, the application sets the forecast territory to null (this implies that there is a gap in the territory hierarchy). If the forecast territory for a revenue credit allocation has been set to null and opportunity assignment was invoked from the UI, a warning message appears.

### **Default Credit Recipient Logic**

Generally, a credit recipient selected by the user does not get replaced by the application unless he is no longer a qualified credit receiver. The application does not change the recipient if:

- The Lock Owner setting for the revenue line is enabled.
- The current credit recipient is under deal protection.
- The current credit recipient is an owner or member of the forecast territory.

If the above criteria are not met, the application sets the forecast territory owner as the new credit recipient.

## **Sales Revenue and Territory Forecast Metrics: Explained**

Oracle Business Intelligence presents a territory forecast view that displays a list of all forecast items assigned to a given territory. Containing key forecasting related metrics, including Unadjusted Forecast and Adjusted Forecast, the territory forecast view allows territory owners to compare these with the revenue-based metrics, Pipeline and Closed Revenue to Date. Both of these revenue metrics are shown in the context of the territory and forecast period/adjustment period and are sourced from the revenue fact table in the data warehouse.

### **Closed Revenue**

Closed revenue is the total revenue amount of all revenue line items where the status category equals Won, forecast territory is the target territory (which is being forecasted), and close date lies in the target forecast period.

### **Pipeline**

The pipeline represents the total revenue amount of all revenue line items where the status category equals Open, the forecast territory is the target territory (which is being forecasted), and close date lies in the target forecast period.

### **Forecasting Updates to Metrics**

Oracle Fusion Sales Forecasting updates Closed Revenue and Pipeline based on real-time information. This is consistent with a real-time forecasting approach, where forecast metrics like Unadjusted Forecast, Best Case, and Worst Case

forecast are computed based on real-time data in the online transaction processing (OLTP) system. To achieve this requirement, these metrics are rolled up along the Active Territory hierarchy.

Sales Forecasting stores the revenue amount on forecast items in the transaction currency (or entered currency), as well as in the corporate currency. Salespersons can edit the revenue amount on the forecast items in the transaction currency. Upon saving an opportunity, the application stores the revenue amount in both the entered currency and the corporate currency. Users also have the ability to select the currency in which to view all currency values in the Sales Forecasting UI, through the use of a page-level currency switcher.

Since the revenue amounts in Opportunity Management revenue line items possibly can be in different entered currencies, it is necessary to convert them to corporate currency before aggregating them for Closed Revenue and Pipeline for a territory.

Note that these metrics are visible in the Sales Forecasting Workbench only.

## Revenue Line Syncing with Opportunity Win Probability: Example

When you change win probably percentage at the opportunity level, revenue items that were previously in sync will be resynchronized automatically.

### Scenario

For example:

- Opportunity Win Probability: 50%
- Revenue Item 1 Win Probability: 50%
- Revenue Item 2 Win Probability: 50%
- Revenue Item 3 Win Probability: 40%

When the Opportunity Win Probability is changed to 60 percent, the win probability for Revenue Items 1 and 2 also will be changed to 60 percent, because they were previously in sync with the opportunity-level win probability.

The win probability for Revenue Item 3 will remain unchanged, because it was not previously in sync with the opportunity-level win probability.

Also note that an item may be included or discluded in forecasting after the win probability is changed, depending on forecast criteria.

## Opportunity Summary Revenue: How It Is Calculated

Summary revenue is the total revenue amount at the opportunity header level.

## Settings That Affect Summary Revenue

Oracle Fusion Opportunity Management computes summary revenue by adding only those revenue lines that have the same status category as that of

the opportunity. Subtotals for summary revenue are also computed based on the status categories of an opportunity and its revenue lines. Summary revenue subtotals always equal the opportunity revenue total.

## **Syncing Behavior of Opportunity and Revenue Line Attributes: Explained**

While opportunity statuses and revenue (line) statuses are separate entities, Oracle Fusion Opportunity Management automatically synchronizes the statuses of the two entities based on certain behavior.

### **Changes to Opportunity Attributes Resulting in Changes to Other Opportunity and Revenue Line Attributes**

For the convenience of sales personnel and to improve accuracy of opportunity revenue data, some of the attributes shared by opportunities and revenue lines have specialized interrelated behavior, so that an update to one opportunity or revenue line attribute may result in an update to another opportunity or revenue line attribute. The common attributes that have specialized interrelated behavior include:

- Win probability
- Close date
- Include in forecast setting
- Status
- Win/loss reason
- Competitor

### **Synchronized Opportunity and Revenue Line Attribute Updates**

One type of specialized interrelated behavior of common opportunity and revenue line attributes is the propagation of opportunity attribute updates to in-sync revenue line attributes. A common opportunity and revenue line attribute is said to be in-sync if its opportunity and revenue line values are the same, and if the revenue line is in the same status category as its opportunity. The revenue line is said to be in-sync with its opportunity with respect to the attribute.

An update to an opportunity attribute will result in propagation of the same attribute update to all of the opportunity revenue lines where the revenue line is in-sync with respect to the attribute. For example, if three of four open revenue lines on an open opportunity have the same close date as the opportunity, an update to the opportunity close date will result in the update of the close date of the three in-sync revenue lines.

Propagation of updates from opportunity to in-sync revenue lines applies to the following opportunity attributes:

- Win probability

- Close date
- Include in forecast setting
- Status (not status category)

For example, an update of an opportunity win probability results in propagation of the same update to win probability for all of the opportunity revenue lines that are in-sync with respect to the win probability attribute (in other words, the revenue line has the same original value of win probability that the opportunity did before the update and is in the same status category as the opportunity). In-sync opportunity and revenue line attribute updates apply to:

- Opportunities in all statuses and status categories
- Normal edit opportunity flow actions and close opportunity flow actions
- Mass update opportunities actions

### **Opportunity Status Attribute Updates**

Another type of specialized interrelated behavior of common opportunity and revenue line attributes involves updates to opportunity status and the side effects that such updates have on other opportunity and revenue line attributes. Updates to opportunity status have the following side effects:

- Propagation of opportunity status updates to in-sync revenue lines as described later in this help topic
- When opportunity status is updated to a Won status:
  - Update opportunity win probability to 100 percent. Do not propagate the win probability update to in-sync revenue lines.
  - Update sales stage to the last stage of the opportunity sales method
- When opportunity status is updated to a Lost or No Sale status:
  - Update opportunity close date to the current date. Do not propagate the close date update to in-sync revenue lines.
- When opportunity status is updated from an open status to a closed status:
  - Enable the opportunity win/loss reason attribute
  - For the close opportunity and mass update opportunities flows only:
    - If the opportunity primary competitor is defined, update the revenue line competitor to the opportunity primary competitor for all opportunity revenue lines where the competitor attribute is undefined
    - The revenue line update behavior related to competitor does not apply to the edit opportunity and mass update revenue lines flows
- When opportunity status is updated from a closed status to an open status:

- Disable the opportunity win/loss reason attribute
- Update the opportunity win/loss reason attribute to undefined. Do not propagate the win/loss reason update to in-sync revenue lines.

### **Revenue Line Status Attribute Updates**

Updates to revenue line status have the following side effects on other revenue line attributes:

- When revenue line status is updated to a Won status: Update revenue line win probability to 100 percent
- When revenue line status is updated to a Lost or No Sale status: Update revenue line close date to the current date
- When revenue line status is updated to a closed status: Enable the revenue line win/loss reason attribute
- When revenue line status is updated to an open status:
  - Disable the revenue line win/loss reason attribute
  - Update the revenue line win/loss reason attribute to undefined

### **Opportunity Win/Loss Reason Attribute Updates**

Another type of specialized interrelated behavior of common opportunity and revenue line attributes involves updates to opportunity win/loss reason.

The opportunity win/loss reason attribute is disabled when the opportunity is in an open status.

An update to an opportunity win/loss reason will result in propagation of the update to all of the opportunity revenue lines where the win/loss reason attribute is in-sync.

In-sync for the win/loss reason attribute means:

- The revenue line has the same original value of win/loss reason as its opportunity before the update
- If a revenue line and its opportunity both have undefined values, they are considered to have the same value
- The revenue line is in the same status category as its opportunity

The above applies to the close opportunity and mass update opportunities flows only. It does not apply to the edit opportunity and mass update revenue lines flows.

### **Revenue Line Win/Loss Reason Attribute Updates**

The revenue line win/loss reason attribute is disabled when the revenue line is in an open status.

## Opportunity and Revenue Line Competitor Attribute Updates

Another type of specialized interrelated behavior of common opportunity and revenue line attributes involves updates to opportunity competitor.

When opportunity status is updated from an open status to a closed status, if the opportunity primary competitor is defined, update the revenue line competitor attribute to the opportunity primary competitor for all opportunity revenue lines where the competitor attribute is undefined.

When an opportunity with one or more revenue lines in a closed status is saved, a validation check may fail because a revenue line competitor attribute is undefined. When opportunity save validation fails for this reason, if the opportunity primary competitor is defined, the error dialog that appears will offer the user an option to correct the validation failure by copying the opportunity primary competitor to all of the revenue lines having undefined competitor attributes. This behavior applies to both edit opportunity and close opportunity flows. This behavior does not apply to the mass update opportunities and mass update revenue lines flows. A validation failure due to missing required revenue line competitor attributes will result in an error message with no options to correct the validation failure.

## FAQs for Manage Sales Revenue

### How can I lock in a sales credit recipient?

When assigning sales credits, you can lock the sales credit recipients of a revenue line by setting the corresponding Lock Owner checkbox on the line. This will prevent the recipients from getting replaced automatically by the system during execution of the default credit recipient logic. Generally, locking is not needed as long as the recipient is an owner or member of one of the eligible forecast territories for the sales credit. However, you should consider locking ad hoc or non-territory-based recipients, such as partner resources, to prevent them from getting removed as credit recipients.

## Manage Opportunity Partners

### Partners in Opportunities: Explained

Managing partners in Oracle Fusion Opportunity Management allows deploying companies to leverage alliances, thereby achieving growth and expansion strategies faster, and to maximize sales through broader territory coverage.

Opportunity Management partner relationship features focus on the following business benefits:

- Direct sales force and partners can work collaboratively and share information effectively as a team.
- The progress of a partner can be measured quantitatively, and thus compensated fairly based on the partner involvement.

- Revenue from partner opportunities can be more accurately forecasted by brand owners.

Using Opportunity Management, sales representatives can add partners to opportunities and revenue lines. Partner users of the application can work individually or with internal sales team members to win opportunities.

### **How Partners Are Added to Opportunities**

Partners typically become involved in opportunities in one of the following ways:

- A partner-registered lead is converted to an opportunity: In this case, a partner registers a lead on the brand owner's sales force automation system. An internal resource (usually a channel manager) approves the registered lead, and an opportunity is created based on the registered lead. The partner on the registered lead becomes a part of the opportunity.
- Partner is added to an internal opportunity: In this case, an internal opportunity is created, either by a direct sales representative or through a lead-to-opportunity conversion, or any other method. The partner is manually added to the opportunity as the partner becomes engaged in the selling process.

### **Supported Partner Functionality**

Opportunity Management can distinguish between these different scenarios and take the appropriate action with regard to team assignment and credit allocation. Following is a high-level list of supported functionality:

- Automatic territory assignment of direct sales representatives and channel managers to opportunities
- Manual assignment of partners to opportunities in which they collaborate
- Support for a consolidated (for example, partner plus direct sales force) forecast of expected vendor revenue
- A territory's forecast includes all, and only, those revenue items that fall into the territory's dimensional boundaries
- Channel sales can submit a nonrevenue forecast of partner opportunities, and this can be compared to the quota for channel sales
- Territory management analytics can distinguish between direct and indirect revenue by capturing the sales channel at the revenue line level
- Tracking of partner relationship contributions to sales opportunities that partners generate and help close
- Leads designated as sourced through a partner sales channel are not assigned to direct sales representatives

## **Searching for Duplicate Opportunities: Explained**

A partner registers a lead in order to claim exclusive rights to pursue the deal. After the lead has been qualified and registered, the partner user submits it to

the channel manager for review. The channel manager then ensures that the lead is not a duplicate in order to minimize channel conflict.

### **Searching for Duplicate Opportunities**

Use the duplicate opportunity search feature in the leads UI to search for potentially matching open opportunities. You can use a combination of search criteria that includes the sales account name, contact name, product group, or product.

### **Search Behavior**

All search fields support wildcards. In addition, if a product group is supplied, the search will also match opportunities that have product group that is either a descendent or an ancestor of the supplied product group in the product hierarchy. Similarly, if a product item is supplied, the search will also match opportunities that have a product group that contains the item. For performance reasons, either the sales account name or product group or item (or a partial name using wildcard) must be specified prior to executing the search.

## **FAQs for Manage Opportunity Partners**

### **Why can't I add a partner to a revenue line?**

A partner must first be associated at the opportunity header level to be able to be selectable in the Revenue Items region. The list of partners available for selection in the revenue table is restricted to those already added at the opportunity level.

### **Why can't I add a partner resource to the opportunity team?**

A partner must first be associated to the opportunity header level prior to adding the partner resource to the team. The list of resources available for selection to the opportunity team is all internal resources and partner resources whose organizations are associated to the opportunity.

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## Analyze Sales Performance

### Sales Prediction Engine: Overview

Predictive models analyze sales data to evaluate buying patterns and selling win or loss rates. The model can be used to identify customer profiles with a greater likelihood to buy certain target products. After evaluation of model results, lead generation can be scheduled in order to disseminate lead recommendations to users who can benefit from the insight gathered. Each lead recommendation includes win likelihood in addition to the average expected revenue and sales cycle duration from past similar deals for the same product to similar customers.

### Prediction Rules: Explained

One method for providing salespeople with quality leads with the best products to sell to specific accounts is to use rules that identify target customer segments for target products. New products with little or no past sales history, products that need to be promoted due lack of demand, and products that need to be pushed to align with marketing initiatives are some of the situations where a company needs to write prediction rules.

Many companies have product experts who have deep market and industry insight about the best customers they should target for their products. They use the information provided by the data mining model to validate their knowledge and to extract correlation patterns. Then they write their own prediction rules to control product recommendations and predictions.

#### Predictions

When creating a prediction rule, a set of business-intelligence-generated metrics for estimated likelihood to buy, revenue, and sales cycle are populated automatically for each target product selected (if past sales data exist for the product). The Business Intelligence metrics are calculated based on predefined formulas which are different from the model predictions. A product expert uses the provided metrics as guidance to help decide on the values to use in the prediction rules. Leads get generated for those target customers who meet the specified rule conditions with the user-defined product recommendations and the associated predictions.

## Rules Management: Explained

Rules management provides ways to create and manage rules more efficiently. You can create rules in the context of business requirements, such as campaigns or sales regions. For example, you can create a folder for a North America sales campaign in which you can logically group all rules pertaining to campaigns for this region.

### Rule Types

Rules management in Fusion works the same way for both types of rules: prediction rules and eligibility rules.

**Prediction Rules:** You can create a prediction rule to identify target customer segments for target products and generate lead recommendations. Prediction rule-based recommendations leverage market intelligence, business intelligence, and qualitative data.

**Eligibility Rules:** You can create an eligibility rule or condition to define conditions that a customer must meet to be eligible for a product. Eligibility rules apply to both prediction model and rule-based recommendation.

### Rule Folders

Rule folders enable you to logically group and manage multiple rules and rules sets. A rule folder comprises rules and rules sets of only one rule type: either eligibility or prediction. You can use a rule folder to manage your rules by campaigns, seasonal events, sales regions or any such logical grouping that relates to the context in which you are creating the rule.

### Views: Rule Folders and Rules

You can choose what the search results must display by selecting either Rule Folders or Rules view. Rule folders view is the default view where the search results display all the rule folders that exist. You can view all rules or rule folders that impact a product across prediction and eligibility rules.

You can search by the folder name in the Rules view to view all the rules that a folder contains. In the Rules view, you can also view and compare across both prediction and eligibility rule types satisfying a search criteria. For instance, you can view all rules that specify conditions for a specific product.

## Predictive Models or Manual Prediction Rules: Critical Choices

You can leverage predictions based on either the predictive models or business prediction rules, or both, to generate sales leads for your company's marketing functions. Simulating product recommendations also uses the model or prediction rules.

## Predictive Models

Use the predictive models if you have existing product lines with enough historical opportunity revenue data that provide strong correlations between customers and buying patterns for meaningful statistical analysis. The predictive models find target customers for products and predict the estimated revenue and sales cycle by customer.

## Prediction Rules

Use prediction rules if you have:

- New product offerings
- Little to no historical data
- Historical data available, but not prescriptive of future trends, based on sales and marketing insight
- Discontinuity in market trends so that the past is no longer an indication of the future (for example, economic, social, or political changes)

Analysts create prediction rules to support sales objectives. Oracle Fusion Transactional Business Intelligence analyzes the available historical data and provides the following metrics for a target product or product group:

- Likelihood to buy
- Sales cycle
- Revenue

Prediction rules can be formulated leveraging the analysis of the predictive models. For a given product with insufficient data, analysts can identify customers to target for similar products based on the analysis conducted for a corresponding, similar product. The insight gained from this analysis can augment the analysts' and product experts' knowledge of the sales environment. Effectively, the evaluation of the predictive model can serve as a basis for prediction rule formulation and for the sales prediction metrics values made available to sales users.

## Selecting Products for Recommendations: Points to Consider

You can only write prediction rules or recommendation eligibility conditions for those products that are selected for recommendations. Also, you can only generate leads for products selected for recommendation. Following are points to consider when selecting products or product groups for recommendations.

### Sales Focus

Select products based on sales and marketing objectives. For example, select poorly performing products, or products you want to concentrate on to reduce inventory, and you will be able to generate leads for such products. Ensuring products are selected allows for the creation of prediction rules in order to meet sales objectives where historical sales data is insufficient or where observed

statistical correlation is weak. There may be specific sales mandates which can't be achieved via model analysis. Prediction rules provide an avenue to fulfilling these objectives.

### **Eligibility**

Additionally, you can have rules which prevent the sale of certain products within customer segments. Management of eligibility conditions can ensure the model derived recommendations don't inadvertently violate these rules. Achieving sales objectives via prediction rules and compliance with sales policies via eligibility conditions will help determine which products to select for recommendations.

## **Using Reports to Analyze the Model: Examples**

Use reports and graphics to analyze predictions and correlations found by the predictive models. The following scenarios illustrate when to use these reports.

### **Likelihood to Buy Model**

Your company recently released a new line of Green Servers, which have similar specifications as the 750VR Servers. Use the insight from the 750VR reports to formulate prediction rules to generate leads for the Green Servers. Find 750VR Servers in the Likelihood to Buy Model report and click the product name to view model details for the server.

The Top Predictors tab displays the attributes that the prediction model found were influential in contributing to the sale of the product. Industry is a profile attribute of high importance, and the report for Industry shows there is a higher chance that the Healthcare, High Tech, and Financial Services industry customers buy this server. On the other hand, the 750VR Servers are not selling well in the Oil & Gas, Retail, and Automotive industries. For the Country attribute, the model found that there is a higher chance that customers in Brazil, France, and the United States buy this server. On the other hand, the 750VR Servers are not selling well in Australia and Ecuador.

The Best Profile tab provides the combination of all parameters which comprise an ideal candidate for purchasing the 750VR Server.

## **Generating Leads Using Predictive Models and Rules: Worked Example**

This example shows how to use both the predictive model and prediction rules to generate sales leads.

You are a sales analyst responsible for reviewing, analyzing and measuring North America sales performance. The sales plan for the new quarter emphasizes pushing several servers, and you want to provide leads as soon as possible. You trained the predictive models with the past years' sales opportunity revenue data and used the model to generate sales leads for the past two quarters. The specific servers your company wants to push this quarter are:

- 8000RT Servers
- 900VR Servers
- 550 VR Servers
- DG 150 Green Servers, a newer product

## Summary of the Tasks

Generate leads using both the predictive model and prediction rules.

1. Review model reports to see if patterns match the current market conditions.
2. Create prediction rules for products where the model results do not support your business needs.
3. Simulate the product recommendations, either from the model or from prediction rules, and decide whether they will generate good leads.
4. If so, generate the leads.

## Analyzing Predictive Models

1. In the Products with Model Insight region on the Overview page, select Likelihood to Buy Model in the **Show** field and review the model quality for all four servers.
2. Analysis of the DG 150 Green Servers indicates the model quality is poor due to lack of sales data, but the model analysis of the other servers can be used as a reference for defining a rule for the green server.

## Creating a Prediction Rule

The new product, DG 150 Green Servers, has very little sales history and the predictive model quality value for this server is low. With the assistance of product experts coupled with a keen understanding of sales objectives, you create your own prediction rule for this product.

1. In the Tasks region, click **Manage Sales Predictor Rules**.
2. In the Manage Sales Predictor Rules page, click **Create Folder**.
3. In the Create Rule Folder page, enter the fields, as shown in this table.

Field	Value
Folder Type	Prediction
Name	DG 150 Green Servers
Description	Prediction rules for DG 150 green servers
Start Date	01/06/2012
End Date	01/06/2013

4. Select the **Active** check box.

5. Click **OK**.
6. Select this new folder and then click **Create Rule**.
7. In the Create Prediction Rule page, enter the **General Information** fields, as shown in this table:

Field	Value
<b>Name</b>	Target High Tech Customers in the US
<b>Description</b>	US High Technology customers are great sales targets for DG 150 Green Servers. Likelihood-to-buy > 70%
<b>Rule Folder</b>	Automatically populated to DG 150 Green Servers
<b>Start Date</b>	01/06/2012
<b>End Date</b>	01/06/2013

8. In the Target Products region, click **Create**.
9. Complete the fields, as shown in this table.

The application computes likelihood, revenue, and sales cycle estimates based on the model analysis. These values can be used as recommended, as guidance for defining and refining your own values, or overridden entirely in favor of realizing sales objectives.

Field	Value
<b>Name</b>	DG 150 Green Servers
<b>Estimated Likelihood to Buy</b>	75
<b>Estimated Revenue</b>	150000
<b>Estimated Sales Cycle</b>	40

10. In the Target Customers region, select **All of the Following from the list**.
11. Click **Add Rule**.
12. Use selections to enter the following condition: Customer / Country = US.
13. Click **Add Rule**.
14. Use selections to enter the following condition: Customer / Industry = High Technology.
15. Click **Save and Close**.

## Simulating Product Recommendations from the Model

Based on the analysis of the model results for the servers, we can conduct a simulation to ensure that the correct customers are targeted for the servers under evaluation.

1. In the Tasks region, click **Simulate Product Recommendations**.
2. Complete the fields, as shown in this table.

Field	Value
Based on	Model Predictions
Ranked by	Likelihood to Buy
Sales Account 1	Pinnacle Technologies
Sales Account 2	Maple Networks
Sales Account 3	Serenity Systems

3. Click **Simulate**.
4. Mouse over each of your target products for each customer to review the likelihood to buy, estimated revenue, and estimated sales cycle.

The model information looks to be accurate for the three sales accounts based on your evaluation of the model results for the servers under evaluation. The simulation verifies the model analysis, instilling confidence in generating and distributing leads based on the model results. You are confident that generating leads from the model will fulfill your sales objectives for three of the servers.

## Simulating Product Recommendations from Prediction Rules

You perform a new simulation to test the prediction rule you created for the DG 150 Green Server. Prior to running the simulation and based on the rule definition, you would expect the DG 150 Green Server to sell to customers in the United States and in the High Tech Industry, which you can confirm by executing the simulation.

1. Complete the fields, as shown in this table.

Field	Value
Based on	Prediction Rules
Ranked by	Likelihood to Buy
Sales Account 1	Pinnacle Technologies
Sales Account 2	Maple Networks
Sales Account 3	Serenity Systems

2. Click **Simulate**.
3. Mouse over the product DG 150 Green Servers for each customer to review the likelihood to buy, estimated revenue, and estimated sales cycle.

The information looks good for your prediction rule and you are confident that it will generate good leads.

## Scheduling Sales Leads Generation

1. In the Tasks region, click **Schedule Predictor Lead Generation**.
2. Click **Create**.

3. Complete the fields, as shown in this table.

Field	Value
Description	Create Sales Leads for West Region
Generated By	Prediction Rules
Select Option	By Sales Territory
Sales Territory	Sales Overlay West

4. Click **Continue**.

5. Click **OK**.

6. Select to run as soon as possible.

7. Click **OK**.

8. Schedule a second lead generation by model analysis to generate leads for the three servers. Complete the fields, as shown in this table.

Field	Value
Generated by	Model
Select Option	By Profile
Industry	High Technology

## Managing Prediction Rules: Examples

Prediction rules identify target customers for target products to provide quality leads for sales. The following scenarios illustrate when you might want to use prediction rules.

### Using Prediction Rules to Introduce a New Product

Sales executives determine that a new product will sell well to large manufacturing customers in North America who have previously bought an earlier model. The sales administrator creates a new prediction rule for the new products with the following conditions:

- Employee size > 10,000
- Industry = Manufacturing
- Region = North American
- Asset = the name of the prior model

The product expert predicts the expected revenue of 500,000 dollars if the targeted product is sold to customers who meet the rule criteria and predicts that the sales cycle should take 30 days. He sets the likelihood to buy at 95 percent.

### Using Prediction Rules to Improve Product Sales

A product specialist researches why a product is not selling as well as expected. He checks the model quality reports for the product and discovers that the

model is of low quality. Sales executives are sure that the product will sell well to pharmaceutical companies in the eastern United States, so the sales administrator creates a new prediction rule for the product that includes these customer conditions.

### **Using Prediction Rules to Overcome Incorrect Data**

The company hired several new salespeople six months ago. Since then, the company has discovered that these new salespeople used old product codes when selling several products. The model is missing accurate historical data for these products. Therefore, the company uses prediction rules based on expert knowledge to generate leads missed by the model.

## **Prediction Rules and Recommendation Eligibility Conditions Editor: Highlights**

You can edit and create your own prediction rules and recommendation eligibility conditions.

### **Rule Editor**

- Using the rule editor, you can select objects to include in your rules and you can write Boolean statements.

See: Working with Rules

## **Recommendation Eligibility Conditions: Examples**

Following are examples of when you can use recommendation eligibility conditions to eliminate ineligible customers from product recommendation simulations and sales leads generation, providing the simulation and lead generation use prediction rules.

### **Government Regulations**

You sell software and government regulations prevent you from selling certain types of software to certain countries. You write rules to prevent recommendations of these products to any customers with locations in these countries.

### **Customer Criteria**

You sell two similar chemicals, both used in manufacturing, but only one meets the criteria for use in the health care industry. You write a rule to designate customers in the health care industry ineligible for one of the chemicals.

### **Cross Selling**

One of your product lines is only sold to new customers because of its low profit margin. You write a rule to prevent the line from being offered to anyone as a cross sell.

## **Assets**

You are starting a sales campaign that features your latest model microscope. You do not want to offer this model to any customer who purchased the previous model within the last year. A rule designates the new model ineligible for any customer who purchased the previous model within one year.

## **FAQs for Analyze Sales Performance**

### **What's a model training?**

Model training (or learning) is the process of discovering intrinsic structures in the data using a set of algorithms to extract patterns and relationships to make predictions for future cases. The predictive models learn from historical opportunity revenue data and predict what products a customer is likely to purchase next, the estimated revenue, and the projected sales cycle.

### **When does the model need to be trained?**

The model requires initial training to gather and analyze historical data. After that, you can schedule incremental training, depending on how dynamic your sales environment is. You can choose to only process revenue items that closed during more recent sales periods. You can also limit the process to specified product families and sales regions. If your sales history is fairly stable and consistent, you can choose to learn incrementally over a period of time. If there are abrupt changes (such as market conditions, supplies, demand, or seasonality), you can conduct an entirely new model training.

### **When do I simulate product recommendations?**

Prior to generating leads, use simulation to preview what products are being recommended to specified customers from either model or rule predictions, and also check to see if prediction rules are evaluated correctly.

### **What's the difference between recommendation eligibility conditions and prediction rules?**

Criteria in a recommendation eligibility condition define when a customer is eligible or ineligible for a specific product or product group. Analytical calculations process recommendation eligibility conditions first before prediction rules to eliminate ineligible customers from further calculations. For example, customers who purchased your Model 1000 microscope within the last year are ineligible to purchase the new Model 2000.

You create prediction rules, based on your industry or product expertise, to identify products to sell to customers who meet predefined conditions. Prediction rules are an alternative to using the statistical model to generate predictions and leads. For example, use prediction rules when new products are

introduced, to promote products with a poor sales history, or to push products to align with marketing initiatives. For example, recommend the new Model 2000 to customers who purchased your Model 1000 microscope three or more years ago.

### **What happens if a prediction rule conflicts with another prediction rule?**

If two or more prediction rules overlap or conflict, then the prediction rule with the most recent update date takes precedence.

In this example, two rules overlap:

- Rule 1
  - Customers in the United States
  - Target product: Model 2000 microscope
- Rule 2
  - Customers in the East United States
  - Target product: Model 2000 microscope

If Rule 2 is edited last, then Model 2000 microscope predicted metrics for East US customers override those from Rule 1 when the lead generation process is executed. The predicted metrics defined for Rule 1 apply to leads generated for customers within the US but not in the East US.

In this example, two rules conflict:

- Rule 1: Customers not in US target Microscope 2000 (essentially position this product to all customers everywhere but in the US)
- Rule 2: Customers in US target Microscope 2000

The conflict between rules in this case, results in leads generated for Model 2000 to all customers (US or otherwise), which is not be the intent. Each rule works to undermine the objective of the other.

### **What happens if a recommendation eligibility condition conflicts with a prediction rule?**

Recommendation eligibility conditions are always evaluated first before prediction rules. For example, if a recommendation eligibility condition says a customer is ineligible for a certain product, then the customer is ineligible regardless of whether or not that customer is targeted for that particular product in the prediction rule.

### **Can I assign the new rule to another folder from the Create Prediction Rule or Create Eligibility Rule page?**

Yes. You can change the folder name, start and end dates, and the Active status from the rules create page as long as the attributes satisfy the conditions of the parent folder.

### **When do I enter product recommendation estimates for a sales prediction rule?**

For each product that you recommend in the prediction rule you create, the application provides calculated estimates for each of the three predictions: likelihood to buy percentage, sales revenue, and sales cycle in days. These serve as a guideline for current sales performance of the product. You can override these predictions using your expert knowledge of the market.

If the product or product group is new or has insufficient past sales data, then no estimates are provided. You must enter estimates based on your market expertise.

### **What's a current model quality?**

A number from 0 to 100 indicates the predictive power of a model. The higher the model quality value, the more impact the resulting predictions will have against a random sampling of events. Therefore, the products with higher model quality can be targeted and prioritized to prospective customers, improving sales success.

### **What's an overall importance?**

Importance is the degree to which an attribute and an outcome show a tendency to vary together. Overall importance is the usefulness or correlation of an attribute identified through the predictive model.

### **Can I run multiple sales leads generation processes simultaneously?**

No. Only one leads generation process, or the model training process, can run at a time. Your submitted process goes into the queue to run after the process currently running completes.

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## Manage Partners

### Manage Partner Accounts

#### Partner Registration: Overview

The Self Service Partner Registration business process flow allows prospect partners to enter and submit a registration application to access the vendor's partner portal. At this point the prospect partner is an anonymous user who is not required to login in order to access partner network information and the registration flow. For most vendors, registration to the partner portal is required before program enrollment. Some companies allow prospect partners to register and enroll in programs in the same transaction.

#### Partner Registration Process

The prospect partner gets information on partner programs from a vendor organization, through marketing campaigns, events, partner recruitment initiatives from the vendor's channel sales organization and so on. The Partner decides to apply for a Partnership with the vendor organization. In order to apply for partnership, the partner must first register on the vendor's registration site. The registration process broadly includes the following steps:

1. Provide information about the prospect partner company like address and primary contact details
2. Provide additional details like number of employees, revenue, area of product expertise and so on
3. Partner reviews and submits the application
4. After the partner user is provisioned in the system, the partner receives an e-mail notification with approval information, login details, vendor contact information and details about how to manage profiles and enroll into programs.

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#### Important

The username you provide must be unique.

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Click the Register Your Company as a New Partner link in the Partner Registration page.

## Modifying Security Settings: Points to Consider

The Login page of the partner portal allows a partner to sign in with a user name and password. A partner can change the password and the security questions and answers.

### Resetting the Password

A partner can reset the password, if required. The password reset process requires that the partner answer the security questions correctly. A new password is provisioned and the partner will receive a new password e-mail notification.

### Security Questions

The partner provides a set of three security questions and answers either during first login or it is available in the user profile. Partners have to take note of the questions and answers that they enter. At the time of resetting the password, the partner has to provide the correct answers to all the three questions.

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#### Note

Contact the systems or delegated administrator, if you have forgotten a security question or answer.

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## Modifying Partner User Profile: Points to Consider

Once a prospective partner registers, the partner will initially have limited access to the Partner Portal. Partner Administrators can do the following Login to the Partner Portal to access their personal profile View and edit profile information such as email address, password, and some personal preferences.

### Modifying Personal Information

Partner users can view and edit their personal information, opt in setting, and change their password and security questions. They can update personal information like name, title, country and so on. They can reset their password and change their security questions and answers.

## Managing Attachments: Explained

An attachment is a document file or URL that is related to a partner account. Attachments are used to upload, download and store content specific to a partner. A channel user can view attachments associated with a partner account. Depending on security privileges they may also be able to add, delete, and update attachments. Partner administrators can also view attachments uploaded to partner profiles.

## Types of Attachments

The different types of attachments are:

- Desktop File: This can be any type of file created in a third party application. (such as MS Word, MS Excel, PDF, and so on)
- URL: A link to a web page on the Internet or intranet
- Text: Plain text can be added to an object.
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## Partner Center: Explained

The Partner Center is a work area that serves a central point to manage partner profile, members, account team, program enrollments, tasks, interactions, leads, opportunities, and to analyze partner performance of each partner.

The Channel Account Managers and Channel Operations Managers can manage their partners effectively and efficiently by having complete information of each partner in a single place. They can manage the partner profile, partner members, track partner tasks and interactions, view leads and opportunities of each partner in Partner Center. Channel managers use the partner profile information to differentiate partners, decide whether a partner should be upgraded or downgraded and provide better support and services, such as marketing funds, incentives, and opportunities. Partner Administrators benefit from self service access to Partner Center to update partner profile, administer the partner users and review program enrollments of their company.

## Partner Lifecycle: Explained

The partner lifecycle tracks a partner's progression through various phases.

### Registered

This status is assigned by the system when the partner registration is approved. This status can also be manually assigned by a channel account or operations manager.

### Active

This status is assigned by the system when a partner's enrollment request to a program is approved. A partner organization cannot be created when the status is set to Active manually.

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### Note

It is recommended that partner users including partner administrator have limited or no access to the Vendor's partner management application system while the status is Registered or Inactive.

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### **Inactive Expired**

This status is assigned by the system when a partner's enrollment in all programs is expired. The status can also be manually assigned by a channel account manager or operations manager.

### **Inactive - Terminated**

This status is manually assigned by a channel account manager or operations manager.

## **Creating Partner User Accounts:Explained**

When you create a partner user, you enable the partner member to access and use the deploying company's resources for working on assigned tasks. You also assign job and security roles to the partner member's user profile and specify the organization to which the new user needs to belong.

### **Assigning Job and Security Roles to Partner Users**

Every partner user needs to have an assigned job role. This job role can be used to create security roles for the user. Based on the security roles you assign, the user can access applications, locations, and data within the deploying company. You may choose to assign security roles automatically to a user; you can also assign additional security roles individually if needed.

### **Assigning Partner Users to Organizations**

While assigning non-manager partner users to organizations, you can either select an organization or a manager. Once you select an organization, the manager of the selected organization becomes the new user's manager. Similarly, once you select a manager, the new user automatically becomes a member of the organization to which the manager belongs.

### **Assigning Manager-Level Partner Users to Organizations**

If the role of the new user is that of a manager, you need to assign the new user to an organization even after specifying a manager. This is because you granted the new user a managerial role, and you now need to specify the organization that the new user needs to manage. You can either select an organization from the list of available organizations, or you can create a new one if required.

## **Automatic Role Provisioning:Explained**

Automatic role provisioning is the process by which security roles are granted to a user based on the user's resource role.

Resource roles capture the nature of work intended to be performed by the partner user. As a result of automatic role provisioning, a range of security roles are granted to the new user. This enables users to access applications flows that are crucial for performing the tasks related to their resource roles.

Once the list of assigned security roles is populated, you can choose to remove roles or add new ones individually as needed.

## Tasks: Explained

Tasks are used to organize, track and resolve a variety of 'To Do' items, from assigning leads to a partner to following up on a partner's performance in a program. Tasks can only be viewed by channel users (vendor).

The channel account manager can create, search, update and delete tasks. Tasks can be used to:

- Support a priority, a category like phone, meeting and so on, Tasks can be related to a business object such as lead or opportunity
- Indicate percentage complete values
- Track business object such as a lead or opportunity.

## Partner Assignment to Opportunities: Explained

Much like any other internal resources, partners can be added or removed from the opportunity team manually. However, the resource picker displays only partner resources whose partner organization is already associated to the opportunity. The same behavior is applied when choosing a partner resource for credit allocation purpose.

### Partner Opportunity Assignment

A partner resource cannot be removed from the opportunity team if the resource is receiving nonrevenue credit on a revenue line on the opportunity. The credit allocations must first be removed from the partner resource. When a partner organization is removed from the opportunity and no resource from that partner is receiving credits on the opportunity, all partner resources, if they exist, will be automatically removed from the opportunity team.

After a partner is added to a revenue line, the next step is to assign matching territories to the revenue line and relevant resources to the opportunity sales team. Partner territories and Partner Program territories (territories of type equal to Partner or Partner Program) are not assigned to opportunities, since they are not used to drive territory forecasting, metrics, or reporting. However, other territories such as Prime, Overlay, Channel Sales Manager territories, and territories of custom defined types will be assigned based on matching dimensional attributes on the revenue line, much like an internal sales opportunity. The treatment of a territory in terms of post-assignment, such as the side effect of adding territory owner or members to the opportunity team, is the same as that of an internal sales territory.

### Sales Credits and Partners

Partner resources are only eligible to receive nonrevenue credits on opportunity revenue. When selecting sales credits for partner resources, only partner resources whose partner organization is associated to the revenue line are

eligible for sales credits. Partner resources are also not eligible for deal protection.

### **Credit Allocation Templates and Partners**

The allocation of credits to partner resources can be automated through the use of credit allocation templates. The automation is highly desirable, since credit allocations for partner opportunities are often split among multiple types of resources (prime, overlay, channel, and partner) and are pre-determined ahead of time in the form of contractual agreement, compensation plan, and/or the program details of the partner agreement.

## **FAQs for Manage Partner Accounts**

### **When do I register as a partner in a vendor organization??**

You can register as a partner after reviewing the vendor's web site and browsing for available partner programs that may interest you. You can engage with the Alliances and Channel team to get additional details on partner programs, before you register.

### **Can I download terms and agreements?**

Yes. The prospective partner must read and agree with the terms and agreements before submitting the registration application. Click **Download Terms and Conditions** to view, save or print the terms and conditions in a separate window.

### **How can I gather partner profile information??**

Partner profile information is usually gathered through the self service partner registration. This information can be entered by the channel managers of a Vendor or Brand Owner company. The partner profile information enables the channel managers to understand and differentiate their partners in order to provide appropriate sales support and incentives for maximizing the channel sales.

Some of the partner profile this information can also be derived from partner sales transactions like closed partner opportunities revenue last year, or partner data stored in external sources. Some partner profile information can be updated by the partner user or administrator.

### **Can I cancel a registration?**

Yes. At any point during the registration flow, the prospective partner can cancel a registration progress. All the information entered will be lost at the time of cancellation.

### **Why am I unable to provision user accounts for the partner members I create?**

Only approved or active partner companies can create user accounts. If you belong to a prospective or registered partner company, you can create partner members but cannot create user accounts.

### **Why am I unable to select an organization once I have selected a manager while creating user accounts for my partner company?**

If you are creating a member user, the manager information is automatically populated once you choose the organization to which the user needs to belong. However, if you are creating a manager user, you need to specify the organization that you want the new user to manage. If required, you can also create a new organization for the new manager user.

### **Why can I not see a complete list of roles when I assign security roles to my partner users?**

When you assign security roles to your partner users, the screen displays only those roles that are enabled for your profile or which can apply to the job role you chose while creating the user.

## **FAQs for Manage Partner Enrollment**

### **Can I add questions to a questionnaire?**

The Channel Partner Manager can add, modify or delete questions from a questionnaire. The questionnaires collect key information that will be used to assess the application for program enrollment and also will help gather key attributes that will help the partner manager manage the transactions after the enrollment is complete.

### **What's a decommissioned program?**

A decommissioned program is a program that has been decommissioned by the vendor organization. Decommissioned programs are not available for enrollment.

### **What's a Partner Program Enrollment Term?**

Programs can have terms with a duration specified in days, months or years. When a partner enrolls for a program, the partner must apply for renewal by the end of the term. An enrollment can also be set up for automatic renewal. An enrollment term can be null. In such a case, a program enrollment has no term.

## **Manage Partner Programs**

### **Partner Program Approval: Explained**

The overall business process of reviewing and approving a partner program is managed by the approver. The overall process is as follows:

The approver receives a notification and opens the item, reviews the summary, benefits, budget, fees, eligibility and may approve or reject the item. If approved, the channel partner manager releases the program on the site for enrollment and updates the program summary.

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**Note**

The approval process may take days, weeks to months to evolve to the point where the programs are ready for approval and release.

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## Program Status: Explained

A program can be in different statuses during its lifecycle. The various statuses are::

**Draft**

This indicates that a program is work in progress. A Program Manager sets the status of the program to draft status while defining the elements of a partner program.

**Submitted**

This indicates that the Program Manager has completed defining the elements of a partner program and has submitted the program for approval within the channel partner manager's heirarchy.

**Rejected**

This indicates that the programs that have been rejected. Once a Partner Program has been submitted, the approver can reject the program.

**Unpublished**

: An unpublished program indicates that the program has been approved by the Program Manager's approver, but the status has not been changed. The program remains in unpublished status until the program manager changes the status to Published.

**Published**

A published program is an active Partner Program and is open for enrollment to partners

**Terminated**

This indicates that the programs have been terminated. A program manager may terminate a program ad hoc or after the time period or if the active end date has passed for a given program

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**Note**

Additionally, a Channel Partner Manager can review partner programs that are in Drafts, Published, Unpublished, or Terminated status.

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## Defining a Partner Program: Overview

The overall business process for defining a partner program involves the following steps:

1. Create or Update a Program

The partner program manager defines the case for the program, indicating the anticipated benefits, and costs to maintain the program over its term. The scope of availability (Languages or Jurisdictions) of the program will be determined. The channel partner manager optionally establishes goals or targets like: enrollments, units sold through, market coverage growth. The channel partner manager works with a number of internal functions like channels marketing, strategy, operations and business practices to define the characteristics and proposed rollout schedule of a program.

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### Note

The process of defining a program can span over weeks or months.

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2. Define or update program summary: The channel partner manager defines the program summary information and sets the program to Draft status. The program can be partially saved at any point in the process. The channel partner manager designs the offering that will appear on the portal in order to position and sell the program to prospective partners. The offering can be presented in more than one language, in which case, the user may have to switch to the language they want to use.
3. Define or Update Contract Terms and Conditions: The legal department defines any proposed agreement language that must be executed by the partner. These agreements and amendments travel through an internal review process where the context for the agreement is reviewed with Legal. The legal team decides on the appropriate legal terminology to use in the program
4. Define or update Legal Agreements: Design and create the template for the legal agreement
5. Define or update Eligibility: The Channel Partner Manager defines the proposed eligibility for the program in a given segment of the market
6. Define or update Benefits: The Channel Partner Manager optionally defines the proposed benefits for the program
7. Define or update Objectives: The Channel Partner Manager optionally defines the goals for the program enrollments, program margin and so on
8. Define or update Questionnaires: The Channel Partner Manager optionally defines one or more questionnaires to be used during enrollment. These questionnaires collect key information used to assess the application for enrollment and to gather key attributes
9. Associate Legal Agreements: Once the Legal Department has created the agreement templates to support the program, the Channel Partner Manager associates the appropriate agreements with the program

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**Note**

Additional attributes set by the channel partner manager will include the method of agreement execution as being online-click, offline or both.

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10. Submit for Approval: The Channel Partner Manager reviews and submits the Program for approval and changes the status to Submitted
11. Review Program for Approval: Workflow approvals are then submitted to the manager to review the program as defined, and approve the program for release or publication. The Approver does the following:
  - a. Receives a notification of pending workflow item
  - b. Opens the item and reviews the Summary, Benefits, Budget, Fees, Eligibility and so on
  - c. Approves, Rejects or Publishes the Program. Once approved, the Channel Partner Manager can release the program.

## Creating an Objective: Overview

Channel partner managers can define objectives for a program, to establish well defined targets or goals for the partner or the program. The program objectives can have a number of key attributes. For example, objectives can be fiscal, training requirements, number of leads registered and so on. The program summary displays the goals and the progress made against these goals. Some of the key attributes of an objective are:

- Description: The Channel Partner Manager describes the objective. The Maximum number of characters is 4096
- Period Type: Dimension to be used for evaluation. For example, Quarter, Month, Year
- Period: Period used for evaluation. For example, Quarter, Month, Year

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**Note**

The period set name is not required, if the objective is constant.

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## Benefits: Examples

The program manager can define tangible benefits for the program such as:

- Additional incentives for deal registration
- Access to product sales and marketing collateral
- Enrollment in the developer network
- Free training

- Platinum support

### **Scenario**

A program manager is creating a program with benefits like free training and platinum support.

## **Objectives: Examples**

Objectives for a program lists the targets or goals for the Program or Partner. Some of the examples for an objective are:

- Generate a revenue from indirect channel for a product or set of products
- Expand geographic reach (emerging markets)
- New Product Launch
- Ramp up the number of trained & certified SIs to support product implementations
- Allocate Partner Tier (Gold, Silver, Bronze)

### **Scenario**

You have created a program with an objective to promote or launch your new product.

## **FAQs for Manage Partner Programs**

### **Can I create a benefit?**

Program managers can define the partner program benefits. They can highlight the value of the program to the partners. Partners are eligible for benefits immediately upon an approved enrollment.

### **What's a Partner Program?**

A partner program enables channel partner managers to define program objectives and provide various benefits to partner to encourage them to enroll into the programs. A partner program can be created to address objectives such as: generate revenue from an indirect channel for a product or a set of products, expand geographic reach (emerging markets), new product launch, provide training and so on. A partner program can be in Drafts, Published, Unpublished, or Terminated status.

A partner program can consist of the following artefacts:

- Program objectives that are aligned with the channel strategy
- Program benefits that provide incentives to partners
- Program questionnaire to gather information from potential partners to determine their eligibility

- Legal Terms and Conditions s part of the program agreements. These are crafted in collaboration with the Channel Operations and Legal team
- Program measures against which the partner performance will be evaluated

### **What's the role of a program manager?**

Program Managers create and maintain a partner program and define the associated benefits, objectives, enrollment questionnaire and other criteria of a program. They can view the program enrollments and participants in a partner program. Knowledge of the partners who have enrolled and other statistics like number of partner enrollments will give a program manager an insight on how the program is being received. A program manager may terminate a program ad hoc or after the time period or active end date has passed for a given program. The Channel Partner Manager identifies the resource who will be the program manager.

### **What's a benefit value?**

The benefit value associated to the program. A benefit can be associated with the following types of values:

- Boolean: For example, Yes or No for free training
- Number: For example, Platinum Support for first five issues

### **What's the difference between a Partner Objective and a Program Objective??**

A partner objective is an objective only assigned to a partner and the program objective applies for the entire program.

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# Administer CRM for Microsoft Outlook

## Supported Software for Oracle Fusion CRM for Microsoft Outlook: Explained

Before using the Oracle Fusion CRM for Microsoft Outlook application, several setup tasks must be performed. One of these tasks is to verify each user's computer has the necessary supported software prior to installing CRM for Microsoft Outlook.

### Supported Client Computer Operating Systems

The following are the supported client computer operating systems:

- Microsoft Windows XP SP3 (32 bit) and higher
- Microsoft Vista SP1 (32 and 64 bit) and higher
- Microsoft Windows 7 and higher

### Microsoft Office Versions Supported

The following are the supported Microsoft Office versions:

- 2007 SP2 and higher
- 2010 and higher

### Supported Outlook Profiles

The following are the supported Outlook profiles:

- Profile with a Microsoft Exchange e-mail account configured in cached mode with single mailbox. Outlook needs to be run with this profile at least once.
- Profile with an Internet e-mail account. Outlook needs to be run with this profile at least once.

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#### Note

CRM for Outlook can only be installed into one of the Outlook profiles.

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Depending on what data file is set as the default mail delivery location in the Outlook profile selected for CRM for Outlook installation, it can be either:

- .ost file
- .pst file

### **IMAP Not Supported**

Only POP protocol is supported. IMAP is not supported for the following reasons:

- The IMAP protocol has a unique structure. Whether or not a custom folder can be created in this protocol depends on the mail server. The CRM for Outlook platform requires the ability to add custom folders, and needs to be able to synchronize custom CRM objects (for example, accounts or opportunities) with Outlook.
- The IMAP protocol cannot be made the default mail delivery location in Outlook, and the CRM for Outlook platform installs to the default mail delivery location in the profile. Either Exchange mailbox or POP .pst can be made the default mail delivery location. A default mail delivery location is required for the platform, as all Outlook activity processing happens there (for example, meeting participants receive notification from the organizer only in this location).

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#### **Note**

Changing the default mail delivery location in the Outlook profile where CRM for Outlook is installed is not supported because doing so will cause the CRM for Outlook add-in to fail.

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### **Microsoft Exchange Server Versions Supported**

The following are the supported versions of Microsoft Exchange Server:

- Microsoft Exchange Server 2003
- Microsoft Exchange Server 2007

### **Other Required Components**

Microsoft .NET Framework 3.5 SP1 or higher is required to support the client application.

## **Manage Outlook Client Configuration Files**

### **What's a client configuration file?**

In Oracle Fusion CRM for Microsoft Outlook, a client configuration file describes a part of the application configuration that resides on the user computer, and it extends the desktop application. Client configuration files can either describe a portion of the application logic implemented as Java script, or can be a declarative configuration of items, such as UI components or synchronization mappings implemented as XML. Each configuration file has a particular type. There can be more than one version of any file type at one time as long as the names differ, and only one file of any given type can be included in a deployment package.

# Manage Outlook Client Deployment Packages

## What's a client deployment package?

In Oracle Fusion CRM for Microsoft Outlook, a client deployment package is a collection of metadata files that describe the CRM application extensions deployed to users' computers. Access to a given deployment package is given to CRM application users through a privilege associated with their job role. When a user connects to the CRM application server to synchronize data from a desktop application like Microsoft Outlook, the application determines if any changes to the package have occurred, and if so, downloads any changes.

## Creating Deployment Packages: Explained

In Oracle Fusion CRM for Microsoft Outlook, deployment packages contain metadata files that describe the CRM application extensions deployed to users' computers. To provide users access to a new client configuration, you can either create a new deployment package or create a new instance of an existing package, as discussed in the following sections.

### Create New Deployment Package

When you create a new package, in addition to activating it, you must configure a data security policy that allows users to access the package. This secondary task is done in Oracle Fusion Authorization Policy Manager (APM) and involves the following steps:

1. In the top left section of the APM application window, use global search to search for Database Resources using search criteria equal to `Outlook`. This should return the result, Outlook Edition Metadata Package.
2. Select the Edit button on the Search Results pane to edit the Outlook Edition Metadata Package database resource.
3. In the Edit Database Resource tab, select the Condition tab and create a new condition on the database resource. Specify any unique name/display name, and set the SQL predicate to `package_name = '<name_of_deployment_package>'` (for example, `package name = 'NewOutlookPackage'`).
4. Select the Submit button to commit the change.
5. Repeat step 2. In the search results pane, select Edit to reopen the Edit Database Resource page to edit the Outlook Edition Metadata Package database resource.
6. In the Edit Database Resource tab, select the Policy tab, and select the policy that should have access to the new package (for example, `ZOE_SALES_MGR_OUTLOOK_DUTY`), and then select Edit.
7. In the lower section of the page, select the Rule tab.
8. Select the lookup control next to the condition field and select the new condition created in step 3.

9. Select Submit to commit the changes.

### **Create New Instance of Existing Package**

When you use an existing package, you create a new instance of the package with different configuration files. When using this method, you must inactivate the previous instance and activate the new instance. There is no need to configure a data policy when creating a new instance of an existing deployment package.

## **Manage Outlook Client Configuration Validation Files**

### **What's a client configuration validation file?**

In Oracle Fusion CRM for Microsoft Outlook, the client configuration validation file (.xsd) describes the structure of a valid client configuration file (.xml). The application uses the client configuration validation file to check that any client configuration file imported to the server is structured correctly and complies with the requirements of the validation file. The validation process happens automatically during the import of any client configuration file, and helps catch misconfigured files.

## **Manage Outlook Server Configuration Files**

### **What's a server configuration file?**

The Oracle Fusion CRM for Microsoft Outlook application uses a file to identify and map services and view objects that are used when processing synchronization requests, and to correctly query, insert, update, and delete data on the server. There is only ever one of these files used at a given time, and changes made to it are recognized by the application and loaded immediately.

## **Oracle Fusion CRM for Microsoft Outlook and the Fusion Server: How They Fit Together**

Oracle Fusion CRM for Microsoft Outlook is a composite application that allows users to work with Oracle Fusion CRM data inside Microsoft Outlook. The application is deployed to Outlook using the add-in framework and extends the Outlook data model and UI framework in order to store and render CRM data to the user.

### **How Oracle Fusion CRM Data is Displayed in CRM for Microsoft Outlook**

Oracle Fusion CRM data is synchronized to users' computers and maintained in native Microsoft Outlook storage. While working in Outlook, users access CRM data that is stored locally, even when connected to the corporate network. The changes made to the CRM data are periodically synchronized with the Oracle Fusion CRM application. There are two options for storing the CRM data:

- A Microsoft Outlook mail profile configured to use a Microsoft Exchange service with the Use Cached Exchange Mode enabled to allow data to be stored in an offline storage file (.ost file format)

- A Microsoft Outlook mail profile configured to use the Internet E-Mail service with personal folder storage (.pst file format)

Because CRM data is maintained in Outlook storage, it can be displayed and accessed like any other Outlook item. For instance, CRM data types will appear in the folders for the user's mailbox alongside other native Outlook types, and users can select the CRM folder and view the CRM records there as they would work with other Outlook information. Within a given folder, the user can select and open a single record to view the data. In this case, the user will have access to CRM data that appears within an Outlook form or inspector window.

In addition to accessing CRM data in Outlook explorer views and inspector windows where the CRM data is the primary focus, users will also be able to access CRM context when viewing standard Outlook items like appointments, e-mails, and tasks. For these Outlook types, the user will be able to specify the CRM customer, related sales item, contacts, and resources associated with the Outlook item, and will be able to navigate to the related CRM item to review additional details.

Data that is stored in either cached Exchange mode in .ost file format, or in personal folders in .pst format, is accessible to the CRM for Microsoft Outlook user while disconnected. The user interacts with the CRM data that is stored locally on his computer and periodically synchronizes data between Outlook and the Fusion CRM server. Synchronization happens when the user is connected to the corporate network and can access the CRM application server. Because the user always works with the local set of CRM data, he will have access to the data from the server immediately following the synchronization process, but doesn't directly access or update the data on the server. Changes are made to the local data set, and then the synchronization process takes care of making changes to the local or server data sets to align the two.

### **Overview of the Synchronization Process**

After CRM for Microsoft Outlook is installed, the user must perform an initial synchronization to retrieve his accessible CRM data. Several synchronization settings are configured as part of the First Run Assistant process that influence the initial synchronization. These include the frequency of automatic synchronization, the synchronization filters to use, and which objects are enabled or disabled from synchronization. These settings can be changed by the user after the initial synchronization. Once the user completes the First Run Assistant process, the initial synchronization will begin. The duration of the synchronization process will depend on the number of records that will be synchronized, network bandwidth, load on the server, as well as processing speed and memory available on the user's computer. A rule of thumb is to try to configure synchronization filters so that no more than five to ten thousand records are synchronized.

During the synchronization process, the application performs the following steps:

1. Connects to the Fusion CRM server CRM for Microsoft Outlook synchronization services using SOAP over HTTP and authenticates the user.
2. Performs a check to determine the configuration for which the user possesses access. Access to an Outlook configuration is established based on a privilege associated with a user's job role that allows access to an Outlook client deployment package.

3. If a user has access to a deployment package, it is downloaded, and the configuration is applied to the Outlook mailbox.
4. The final step is to synchronize data. The records that are retrieved depend on the internal filters configured on the server, data security applied to the objects that are synchronized, and the user filters.

Subsequent synchronization cycles follow a process that includes these steps:

1. CRM for Microsoft Outlook sends a request to the Fusion CRM server with a list of objects and the current user filters and requests a snapshot of IDs and timestamps for all records that are within the scope of the object list and specified filters.
2. The server sends a response with the requested information.
3. CRM for Microsoft Outlook makes a local snapshot of IDs and timestamps and compares that to the server snapshot.

The differences between the local snapshot of IDs and timestamps and the server snapshot result in a few possible actions:

- Inserts, updates, or deletes data on the Fusion server based on changes that occurred in CRM for Microsoft Outlook since the prior synchronization.
- Inserts, updates, or deletes data in CRM for Microsoft Outlook based on changes that occurred on the Fusion server since the prior synchronization.

In all cases, changes that are made to data locally in the CRM for Microsoft Outlook client are only sent to the Fusion server during the subsequent synchronization session; however, users who want to synchronize a change or set of changes immediately can start the synchronization cycle manually to avoid waiting for the next scheduled synchronization.

### **About Web Services Usage During Synchronization**

The synchronization process on the Fusion server is supported by CRM for Microsoft Outlook accessing Web services. CRM for Microsoft Outlook accesses two Web services directly -- one that provides access to data during synchronization processing, and one that provides access to metadata. The synchronization process is initiated by CRM for Microsoft Outlook within the Outlook application, and the Fusion server accepts synchronization requests, routes them to the appropriate services within the service, and returns the appropriate responses. The work that each part of the synchronization architecture performs is summarized as:

1. CRM for Microsoft Outlook synchronization engine and connector that are deployed to Microsoft Outlook perform the following:
  - Initiates a new synchronization request based on a preconfigured automatic synchronization interval or by an ad hoc user request to start a new synchronization cycle.
  - Uses the stored details about username, password, server connection information, and CRM public security certificate stored on the user's computer to format and send requests to the CRM application server.

- Based on the configuration deployed to a user's computer (including object types deployed), fields defined as part of those objects, synchronization filters and the like, the application generates the appropriate SOAP message content and expects the corresponding response when using the HTTP or HTTPS transport to communicate with the CRM applicaiton server.
2. The Fusion server hosts an application that listens for CRM for Microsoft Outlook synchronization requests, and the synchronization services perform the following:
- The OutlookRequestHandlerService Web service processes all incoming requests for data synchronization, and the OutlookMetadataService Web service handles requests to retrieve metadata.
  - Incoming SOAP messages are routed to the appropriate service. These messages include one or more requests to invoke a method on the target service.
  - Requests sent to the OutlookRequestHandlerService in particular are routed to other services to perform the action expected from the synchronization process. For instance, a request to get appointment data sent to the OutlookRequestHandlerService will be routed to the appointment Web service that will process the request and return the requested data, and the OutlookRequestHandlerService will send this back to the CRM for Microsoft Outlook client that sent the request.

A synchronization cycle will include requests to get a server snapshot, and can then include many additional requests to query, insert, update, and delete data based on the changes detected when CRM for Microsoft Outlook compares the local and server snapshots.

- Each of these requests is processed based on the type of request, and is either managed within the OutlookRequestHandlerService processing directly or is routed to the appropriate target service to be fulfilled.

### **Extensions to the Standard Outlook User Interface**

In addition to standard Outlook data storage mechanisms and the synchronization engine, several extensions to the standard Outlook user interface provide a way to access and manage CRM data inside of Outlook. Examples of extensions to the standard Outlook user interface include custom toolbar buttons, menu items, inspectors that display Fusion CRM data, controls that are embedded on standard Outlook item inspectors, the personalization options dialog box, and so forth. The CRM for Microsoft Outlook client can use these extensions to perform a variety of tasks.

The following are some examples of tasks that the user can perform:

- Create, view, and edit CRM data in Outlook.
- Mark an Outlook item to be shared with CRM Desktop and associated sales data.
- Initiate a standard Outlook action, such as sending an e-mail or scheduling a meeting in the context of a sales item.

The behavior of the extended Outlook user interface is influenced by custom CRM business logic that performs a variety of validations during data entry. The following are some examples of validation that are performed:

- Confirm that the data type is valid for a given field.
- Make sure fields that are required are populated.
- Prevent changes to fields or records that are configured to be read-only.
- Validate field values based on comparisons with other fields or static values.
- Apply conditional validation so that a field may be required or read-only based on other criteria.

### **Physical Components that CRM for Microsoft Outlook Architecture Uses**

Following are the major physical components that CRM for Microsoft Outlook uses:

1. CRM Database

This is the database accessed by the CRM application that stores data about customers, contacts, business opportunities, and so on.

2. CRM Application Server

This is the server that hosts the CRM for Microsoft Outlook application and the related Outlook Web services, and therefore is the main entry point for synchronization requests coming from the CRM for Microsoft Outlook add-in running on users' computers.

3. Laptop or Desktop

This is the computer where the CRM for Microsoft Outlook add-in is installed, and where users are working with CRM data in Outlook. The Outlook add-in will install binary files that support synchronization of CRM data and integration with Outlook, including support to extend the Outlook data model and user interface, and resource files containing images and strings to initialize the application. The CRM for Microsoft Outlook add-in will connect to the CRM application server and download the appropriate configuration and CRM data for the user which are also stored on this computer.

4. Corporate Messaging Infrastructure

The corporate messaging infrastructure encompasses all of the server computers and other network topology that support the transmission of e-mail messages, and other personal information management capabilities such as the corporate calendar, contact and task lists.

### **CRM for Microsoft Outlook Functional Components**

Following are the CRM for Microsoft Outlook functional components:

1. CRM Extensions in Outlook

Extensions integrate with Outlook data storage and deliver additional business logic and extensions to the Outlook user interface to allow users

to access and modify CRM data. CRM data is viewed with extensions to the Outlook user interface. Changes to CRM data are controlled by business logic and custom controls and then finally stored in Outlook data storage (for example, in a user's mailbox storage file). The user works with a version of the CRM application, as defined in the configuration deployed to the user's computer. Changes to CRM data since the last synchronization cycle are calculated by the synchronization engine during data synchronization with the CRM application server.

## 2. Synchronization Engine

The synchronization engine handles requests to initiate a synchronization cycle and is responsible for structuring the requests that are sent to the server. For the initial and incremental synchronization cycles, the synchronization engine manages requests to count records available to the user; sends a request to generate a server snapshot; initiates the process to generate a local snapshot; compares the results; and calculates the necessary requests to be sent to the CRM application server to complete the synchronization of local and server data sets. The synchronization engine works in tandem with the connector to correctly format and transmit messages with the CRM application server.

## 3. CRM Connector

This part of the CRM for Microsoft Outlook add-in is responsible for knowing how to connect and communicate with the CRM application server. The connector uses details such as the username, password, connect string, public security certificate, and client metadata to interpret requests from the synchronization engine to correctly format and send requests to the CRM application server. All details of the requests to send to the server are orchestrated by the synchronization engine, but the transmission of the requests and retrieval of the responses is done by the connector. The connector uses the details in the connect string to know where to send requests to the CRM application Web services.

## 4. CRM Application Web Service

CRM Web Service provides functionality to handle the user session, and to add, delete, modify, count, and list data objects that are required by the Web service connector.



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## Administer Mobile Sales

### Oracle Fusion Mobile Sales: Overview

The Oracle Fusion Mobile Sales application serves a critical need for mobile sales force personnel as a means to receive time-critical updates regarding the sales activities in the enterprise. For the deploying organization, one of the greatest benefits of the mobile application is increased sales representative productivity.

The main functionality and features of the application are:

- **Application home page:** The application home page provides sales representatives with access to critical information when they are out in the field making sales calls and decisions. All functional areas of the application are arranged in grid fashion on the home page, using icons for functional areas, with labels corresponding to those areas. Users touch an icon to navigate to the corresponding object.
- **Sales account management:** With access to the sales accounts in their territory while on the road, the sales representative can access reference information (for example, customer location on a map) as well as current events about the customer (for example, news headlines via RSS feeds). This information creates a sales representative who is more knowledgeable and responsive to the customer.
- **Opportunity management:** From the mobile opportunity management page, the sales representative can access current and critical information about their opportunities and quickly share opportunity updates with the sales team. From the organization standpoint, the benefits are increased accuracy of the pipeline and forecast, since sales representatives can more readily provide updated information about opportunities even while on the road.
- **Lead management:** With access to their open leads while on the road, the sales representative can more quickly act upon the leads and reduce the sales cycle time. From the organization standpoint, the benefits are increased accuracy of the pipeline, since sales representatives can more readily provide updated information about leads even while on the road.
- **Calendar and tasks:** Use of the mobile calendar and tasks allows the sales representative to view events occurring in the next two weeks, and a list

of all open tasks, helping the sales representative to manage appointments and tasks on the road.

- **Contacts:** The application displays a list of key contacts, and using **Search** a sales representative can search for all contacts. Contacts can be easily phoned or e-mailed from the Actions menu in the Contact page, using the Email Contact and Call Contact feature. Contacts that do not want to be phoned or e-mailed will have the Email Contact and Call Contact features disabled.
- **Sales analytics:** Sales representatives can access business intelligence reports (current period performance and opportunity pipeline) from the home page. Analytics also are embedded contextually for each account a sales representative is viewing on the mobile application, thus providing him with useful contextual insights into his accounts. The contextual reports include data on sales account revenue trends, sales account win/loss trends, and sales account win/loss reasons.
- **Alerts:** Alerts are automatically sent out for new leads assigned to the sales representative, as well as updates to opportunities of interest.

## Mobile Sales Extensibility: Explained

Oracle Fusion CRM Application Composer lets implementors customize the Oracle Fusion Mobile Sales iPhone and Blackberry applications. Using Application Composer, implementors can manage which objects and fields are visible on Mobile Sales without having to do specific customizations for any particular device.

Implementors can manage the following for the mobile application:

- Enable for the mobile device standard Oracle Fusion Sales objects that are not enabled by default
- Enable for the mobile device custom Sales objects
- Change the fields (including custom fields) visible on Mobile Sales for mobile-enabled Sales objects (standard or custom objects)
- Change the fields (including custom fields) visible on Mobile Sales for contacts

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### Note

To customize the sales contact object model, select the **Trading Community Org Contact** object under the **Common** application in Application Composer. To expose those sales contact object model changes on Mobile Sales pages, you must select the **Mobile Contact** object under the **Sales** application in Application Composer, then select the **Pages** node on the object's navigation tree.

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To customize Mobile Sales for a given object, select the application you want to customize within Application Composer, and then select the parent object to manage. Select the **Pages** node in the navigation tree, then select the **Mobile Pages** tab to see the mobile configuration options for the parent and its child

objects. For details on Application Composer, refer to the Oracle Fusion Applications CRM Extensibility Guide.

## FAQs for Administer Mobile Sales

### What are the supported platforms for Oracle Fusion Mobile Sales?

The Oracle Fusion Mobile Sales client is supported on the following Apple and Blackberry platforms and devices:

- The Apple mobile operating system, iOS 4.3 and above
- The following Apple mobile devices: iPhone 4, iPhone 3GS, iPhone 3G, iPod Touch
- The Blackberry mobile operating systems, 5.0 and 6.0
- The following Blackberry models: 9800, 9300, 8900, 8500, 9000, 9650, 9700, 9530, 9550

### How do users sign in to the Oracle Fusion Mobile Sales client?

Users will enter their usernames, passwords, and the Oracle Fusion CRM server details to sign in to the client. When users enter the Oracle Fusion CRM server details, they will need to enter the CRM server location - this will be the same location as the deployed Oracle Fusion Sales application, for example, crm.mycompany.com. Administrators can choose to enable or disable the automatic saving of passwords on the device by setting the **Password Save on Phone Enabled** profile option within the Manage Administrator Profile Values task.

### How can users navigate within the Oracle Fusion Mobile Sales client?

On both the Apple iPhone and Blackberry mobile devices, touching on any icon on the home page shows a list of items. For example, pressing Opportunities retrieves a list of the user's open opportunities. The user can view details by touching any item in the list view. Additionally, users can scroll upward in list view to obtain a search box to search for items on the client application. For quick and easy access to contextual actions, users can press and hold any list item to reveal available contextual actions.

On the Apple iPhone, users touch the **Title** bar, which returns them to the application springboard. Then they select **Action** to reveal a contextual action sheet. Selecting **Action** again closes the action sheet.

On the Blackberry, both **Short** and **Full** menus are enabled. Users also can use the **Back** button to return to previous screen.

### How can users synchronize Apple iPhone calendar and contacts with Oracle Fusion CRM?

To synchronize your Apple iPhone contacts and calendar from Oracle Fusion CRM to an iPhone, users must configure the calendar (calDAV) and contacts (cardDAV) settings on the iPhone.



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# Manage Tablet Application Configuration

## Oracle Fusion Tap for Oracle Fusion Applications: Highlights

Oracle Fusion Tap for Oracle Fusion Applications enables you to use a tablet device to complete day-to-day sales and human resources tasks, and review key business information.

For example, HR professionals can use Oracle Fusion Tap to:

- Monitor business critical performance indicators, receive alerts, and drill down to details accessed through integration with real-time business intelligence
- Compare workers, no matter where they are in the organization, by simply tapping on them in the interactive organizational chart
- Obtain a true view of workers by blending human resource information with job specific information
- Export a peer, their peers, and their direct reports with a single tap on a contact list

Sales managers and executives can use Oracle Fusion Tap to view key performance indicators and obtain an accurate view about how the business is performing. Salespeople can also:

- Access contacts, accounts and opportunities when out of the office
- Identify key contacts and collaborate with sales co-workers
- Browse interactive sales catalogs to discover, present, and compare products
- Log sales activities and notes quickly and easily

### Oracle Fusion Tap Capabilities and Installation

- End users can learn about Oracle Fusion Tap capabilities and installation. See: Oracle Fusion Tap for Oracle Fusion Applications Capabilities and Installation document (1430761.1) on My Oracle Support at <https://support.oracle.com>

## **Extensibility**

- Administrators can learn how to configure the different page displays for opportunities on tablet devices. See: Oracle Fusion Tap for Oracle Fusion Applications Extensibility (1430783.1) on My Oracle Support at <https://support.oracle.com>

## **See Also**

- You can view more details about extensibility options and capabilities across all Oracle Fusion applications.

See: Oracle Fusion Applications Extensibility Guide

- You can access more implementation information for Workforce Deployment.

See: Oracle Fusion Applications Workforce Deployment Implementation Guide

- You can access more Sales implementation information.

See: Oracle Fusion Applications Sales Implementation Guide

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# Glossary

**adjusted forecast**

Total forecast for all revenue items that meet forecast criteria plus a salesperson's adjustment amount, which can be a positive or negative number.

**adjusted territory quota**

The quota amount assigned to the user plus the adjustment amount entered.

**adjustment threshold**

Largest percentage of a quota that can be added as an adjustment.

**deal size**

Total monetary amount the customer is expected to spend.

**dimension**

A data category used to define territory boundaries, such as geography. Dimensions contain related members usually organized in hierarchies. For example, a geography dimension often includes members such as countries and cities that belong to countries. Defined dimensions determine how to assign objects such as sales accounts, leads, and opportunities.

**dimension member**

Individual components of a dimension.

**forecast due date**

The date after which the forecast changes from current status to past status and no changes can be made to the forecast.

**interaction**

A record of contact or communication between internal and external contacts.

**lead**

A new prospect or existing customer who has interest or the potential for interest in a product or service being sold. The interest is represented in the application by a lead.

**lead rank**

A configurable set of values such as hot, warm, or cool used to prioritize leads for lead qualification and sales engagement.

**line of business**

A particular kind of commercial enterprise. For example, a broad grouping of sellable products such as hardware or training.

**market potential**

Estimated revenue for sales leads and recommendations within a territory.

**named account**

A sales account that can be assigned directly to a sales territory.

**nonrevenue quota**

A type of quota typically assigned to a sales resource with overlay sales roles, such as sales consultants or telemarketing representatives, to measure their performance.

**overlay territory**

A territory, usually owned by an internal employee, whose team supports the sales activities within the territory boundaries. Overlay territories often overlap with one or more prime or other overlay territories.

**partner**

Independent company that works with multiple vendors, selling and servicing on behalf of a vendor.

**prediction rules**

A user-defined business logic that identifies target customer segments for target products based on a set of criteria to predict the likelihood of target customers to buy a product, the average revenue, and the average sales cycle salespeople could expect.

**predictive model**

Functions built from an observable data sample and used to estimate an outcome that is unknown at the point of decision. Predictive models analyze past sales data to predict future sales potential. For example, models predict likelihood to buy, potential revenue, and estimated length of the sales cycle.

**prime territory**

A territory that is usually owned by an internal employee who is directly responsible for sales within the territory boundaries. Prime territories aim to assign sales representatives to each region where potential customers are located.

**prospective partner**

An organization that has the potential to enter into a partnership with the deploying company or has expressed interest to become a partner by submitting an application for registration.

**qualified lead**

A qualified lead is one where the lead qualification status has been updated to qualified. Generally, a lead is considered qualified and ready for conversion to

a sale when the need, purchase interest, and budget are confirmed and a sales account and primary product are associated with the lead.

**quota**

A revenue target, often tied to expected performance.

**recommendation eligibility condition**

Rules that define what can or cannot be sold to what customers based on a set of eligibility or business criteria, such as due to company policy or customer eligibility constraints. Eligibility conditions are evaluated before any recommendations can be made.

**resource**

People designated as able to be assigned to work objects, for example, service agents, sales managers, or partner contacts. A sales manager and partner contact can be assigned to work on a lead or opportunity. A service agent can be assigned to a service request.

**resource quota**

The revenue target associated with a territory resource. Resource quota can be either revenue resource quota or nonrevenue resource quota.

**revenue**

The recognized monetary amount for a sale.

**sales account**

Parties with the usage Sales Account and a sales account profile containing sales information specific to the party. When a party has one sell to address, it ceases to be a sales prospect and becomes a new sales account. When the party purchases something, it changes from a new to an existing sales account.

**sales campaign**

A sales campaign enables a salesperson to target customer contacts by e-mail in a personalized campaign, using marketing generated collateral.

**sales quota**

Territory and resource quota together compose sales quota.

**sales quota plan**

Plan that contains all quota activities for the fiscal year, created by the administrator. Actual sales and pipeline are tracked against only one quota plan for the year.

**source territory**

A territory with one or more dimensions inherited by at least one recipient territory.

**territory**

The jurisdiction of responsibility of a salesperson or sales manager over a set of sales accounts. Territories serve as a basis for forecasting, quota, compensation, and analysis of sales performance.

**territory coverage**

A territory coverage is one set of related dimensions that together define what is included in the territory and what can be sold. For example, sell all products in North America. In addition to this Regular Coverage, selected sales accounts or partners can be included or excluded from the territory being defined.

**territory freeze date**

The date after which forecasting stops accepting territory hierarchy changes for the scheduled forecast, and forecasting activities can begin.

**territory owner**

Resource assigned to manage a territory and is typically accountable for the work objects, such as opportunities, that are within the boundaries of the territory.

**territory proposal**

A sandbox container used to model territory changes. All valid territories within a proposal become active on the proposal activation date.

**territory quota**

The revenue target associated with the expected performance of a territory.

**unadjusted sales forecast**

The unadjusted forecast is the total forecast for all revenue items that meet forecast criteria and that have close dates falling within the forecast period. The unadjusted number excludes any adjustments applied on top of the underlying forecast items.