PeopleSoft 8
CRM Sales PeopleBook

PeopleSoft 8 CRM Sales PeopleBook

SKU CRMr8CSFA-B 0601

PeopleBooks Contributors: Teams from PeopleSoft Product Documentation and Development.

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About This PeopleBook

The book provides you with the information that you need to implement and use PeopleSoft *CRM SALES*. You can order the online version by requesting SKU *CRMB8r0* or the print version by requesting SKU *CRMr8CSFA-B 0601*.

This section describes information that you should know before you begin working with PeopleSoft products and documentation, including PeopleSoft-specific documentation conventions, information specific to the PeopleSoft *Customer Relationship Management* product line, how to order additional copies of our documentation, and so on.

Before You Begin

To benefit fully from the information covered in this book, you need to have a basic understanding of how to use PeopleSoft applications. We recommend that you complete at least one PeopleSoft introductory training course.

You should be familiar with navigating through the system and adding, updating, and deleting information using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft® Windows or Windows NT graphical user interface.

Because we assume that you already know how to navigate around the PeopleSoft system, much of the information in this book is not procedural. That is, it does not typically provide step-by-step instructions on using tables, pages, and menus. Instead, we provide you with all the information that you need to use the system most effectively and to implement your PeopleSoft application according to your organizational or departmental needs. This book expands on the material covered in PeopleSoft training classes.

Related Documentation

To add to your knowledge of PeopleSoft applications and tools, you may want to refer to the documentation of other PeopleSoft applications. You can access additional documentation for this release from PeopleSoft Customer Connection (**www.peoplesoft.com**). We post updates and other items on Customer Connection, as well. In addition, documentation for this release is available on CD-ROM and in hard copy.

Important! Before upgrading, it is *imperative* that you check PeopleSoft Customer Connection for updates to the upgrade instructions. We continually post updates as we refine the upgrade process.

Documentation on the Internet

You can order printed, bound versions of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM. You can order additional copies of the PeopleBooks CDs through the Documentation section of the PeopleSoft Customer Connection web site: **http://www.peoplesoft.com/.**

You'll also find updates to the documentation for this and previous releases on Customer Connection. Through the Documentation section of Customer Connection, you can download files to add to your PeopleBook library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation delivered on your PeopleBooks CD.

Documentation on CD-ROM

Complete documentation for this release is provided on the CD-ROM *Customer Relationship Management* SKU *CRMB8r0*.

Note. Your access to PeopleSoft PeopleBooks depends on which PeopleSoft applications you've licensed. You may not have access to some of the PeopleBooks listed here.

Hardcopy Documentation

To order printed, bound volumes of the complete PeopleSoft documentation delivered on your PeopleBooks CD-ROM, visit the PeopleSoft Press web site from the Documentation section of PeopleSoft Customer Connection. The PeopleSoft Press web site is a joint venture between PeopleSoft and Consolidated Publications Incorporated (CPI), our book print vendor.

We make printed documentation for each major release available shortly after the software is first shipped. Customers and partners can order printed PeopleSoft documentation using any of the following methods:

Internet	From the main PeopleSoft internet site, go to the Documentation section of Customer Connection. You can find order information under the Ordering PeopleBooks topic. Use a Customer Connection ID, credit card, or purchase order to place your order. PeopleSoft internet site: **http://www.peoplesoft.com/**.
Telephone	Contact Consolidated Publishing Incorporated (CPI) at 800 888 3559.
Email	Email CPI at callcenter@conpub.com.

Typographical Conventions and Visual Cues

To help you locate and interpret information, we use a number of standard conventions in our online documentation.

Please take a moment to review the following typographical cues:

`monospace font`	Indicates a code example.
Bold	Indicates field names and other page elements, such as buttons and group box labels, when these elements are documented below the page on which they appear. When we refer to these elements elsewhere in the documentation, we set them in Normal style (not in bold).
Italics	Indicates a PeopleSoft or other book-length publication. We also use italics for *emphasis* and to indicate specific field values. When we cite a field value under the page on which it appears, we use this style: ***field value.*** We also use italics when we refer to words as words or letters as letters, as in the following: Enter the number *0,* not the letter *O.*
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press W.
Cross-references	The phrase "For more information" indicates where you can find additional documentation on the topic at hand. • Capitalized titles in *italics* indicate the title of another PeopleBook. For example: For more information about billing, see *PeopleSoft 8 Billing PeopleBook.* • Capitalized titles in *italics* followed by chapter title in quotes refer to a chapter in another PeopleBook. For example: For more information about establishing rate templates, see *PeopleSoft 8 Projects PeopleBook,* “Integrating With PeopleSoft Billing and PeopleSoft Contracts.” • Capitalized titles in quotes refer to another chapter of this PeopleBook. For example: For more information about contract status security, see “Securing Your PeopleSoft Contracts System.” • Capitalized titles refer to sections within this chapter of this PeopleBook. For example: For more information about Defining Contract Statuses, see Defining Your Own Contract Statuses.

Note. Text in this bar indicates information that you should pay particular attention to as you work with your PeopleSoft system. If the note is preceded by **Important!,** the note is crucial and includes information that concerns what you need to do for the system to function properly.

Text in this bar indicates **For more information** cross-references to related or additional information.

Warning! Text within this bar indicates a crucial configuration consideration. Pay very close attention to these warning messages.

Page and Panel Introductory Table

In the documentation, each page or panel description in the application includes an introductory table with pertinent information about the page. Not all of the information will be available for all pages or panels.

Usage	Describes how you would use the page, panel, or process.
Object Name	Gives the system name of the page, panel, or process as specified in PeopleTools Application Designer. For example, the Object Name of the Detail Calendar page is DETAIL_CALENDAR1.
Navigation	Provides the path for accessing the page, panel, or process.
Prerequisites	Specifies which objects must have been defined before you use the page, panel, or process.
Access Requirements	Specifies the keys and other information necessary to access the page or panel. For example, **SetID** and **Calendar ID** are required to open the Detail Calendar page.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like changed, about our documentation, PeopleBooks, and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager
PeopleSoft, Inc.
4460 Hacienda Drive
Pleasanton, CA 94588

Or send comments by email to the authors of PeopleSoft documentation at:

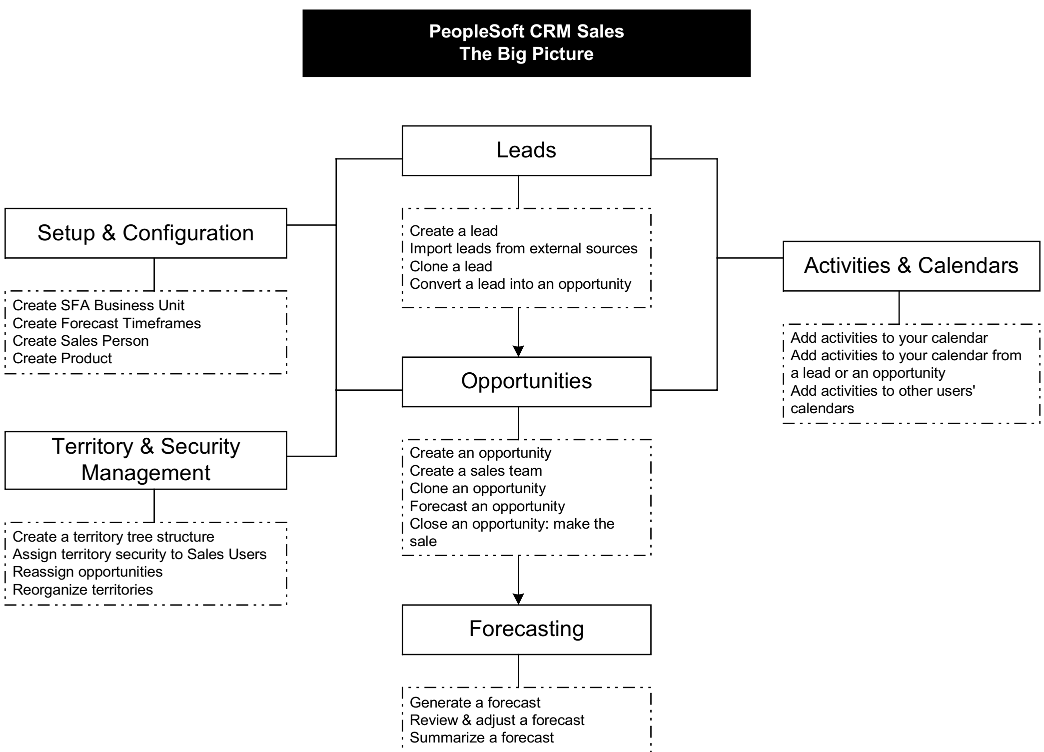
DOC@PEOPLESOFT.COM

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions. We are always improving our product communications for you.

CHAPTER 1

PeopleSoft CRM Sales PeopleBook

PeopleSoft CRM Sales enables you to import leads, track opportunities, make forecasts, generate quotes, and track all the tasks you perform along the way. The companion Sales Insight product enables you to analyze the data you collect.



PeopleSoft CRM Sales: The Big Picture

After your system is set up, your organization can get to the business of managing its sales efforts and understanding the effectiveness of its efforts, where your money is being made. First you bring lead data into the system; for example, by referrals, the data entry of business cards you may have obtained at a trade show, or lead lists you may have purchased. Sales representatives will work with those leads to qualify them as prospects or identify whether they should be removed from the system. If the lead is promising, you can click one button to convert it to an opportunity.

PeopleSoft CRM Sales provides a system calendar for tracking tasks. For example, if a prospect ask you to call back in two weeks, you can capture that request so that it appears in your personal calendar.

Depending on your company's sales cycle, you may need to record sales support activities. Throughout the process of working with opportunities, sales representatives can assign approximate deal value and degrees of confidence that the deals will close.

Management can see how many opportunities are at specified stages in your company's sales cycle and the approximate value of deals in the works. You can also use qualitative information to assess where your company is succeeding. For example, if, throughout the sales process, you are capturing details about your customers, such as their industry or who your competitors are on specific types of deals, you can readily see where your company is strong and where more resources might be needed.

Using this PeopleBook

This PeopleSoft CRM Sales PeopleBook is divided into five chapters covering the major areas of functionality. The first two chapters describe administrative setup tasks you need to perform before using PeopleSoft CRM Sales. The remaining chapters explain how to use the application to manage your sales activities.

Defining Users and Territories covers the steps necessary to give people appropriate security access to the application. It also explains how to create a territory tree that define the hierarchical relationships between the various parts of your sales organization.

Defining the Business Environment describes how to record information about your sales business: the industries you serve, the partners you work with, the sales process you use, and the products you sell.

Managing Leads introduces the tools that PeopleSoft CRM Sales offers for capturing and tracking lead information.

Managing Opportunities explains how PeopleSoft CRM Sales helps you follow through on opportunities.

Forecasting collects together data about leads and opportunities into a financial snapshot of the organization.

Running PeopleSoft CRM Sales Reports provides information about the standard reports.

CHAPTER 2

Defining Users and Territories

The first step in setting up your PeopleSoft CRM Sales system is defining system users and specifying what parts of the application those users can use. Since a person's access requirements depend on his or her position in the company, an important part of setting up security is defining your company's organizational structure, especially as it relates to sales territories.

In this chapter, we discuss the following tasks:

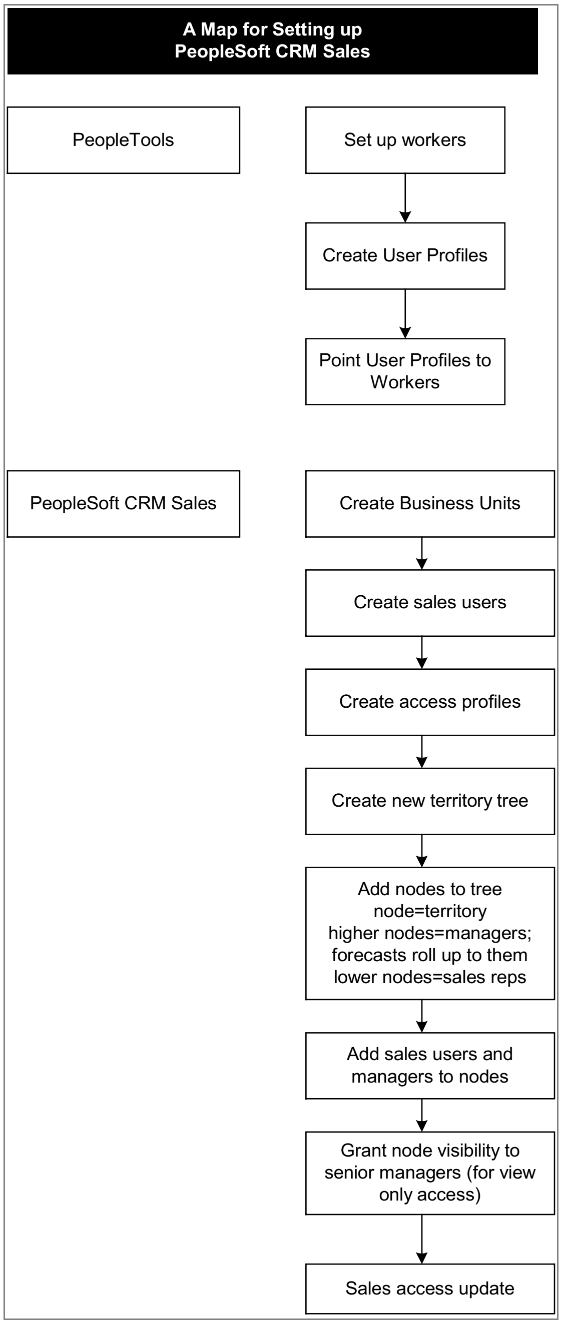
- Setting up security and access profiles.
- Entering sales users.
- Defining business units and territory trees.
- Reorganizing territories.

Overview of Setting Up Users and Territories

Getting a user set up to use PeopleSoft CRM Sales involves several steps. Since a user's security access rights depend on his or her position in the organization, some of these steps involve your *territory tree*, which is a graphical representation of the structure of your sales organization.

The major steps in the process are:

- Create a Person ID and PeopleSoft User ID for each person that uses the application. These IDs identify the user and enable him or her to log onto the system. See Giving Users Access to PeopleSoft CRM Sales.
- Create *access profiles*, which specify what data a user can see, and assign the appropriate profile to each user. See Creating Access Profiles and Defining Sales Users.
- Define your organizational structure by creating business units and a territory tree. You associate sales people with each territory in the tree. See Defining Your Organizational Structure.



A map for setting up PeopleSoft CRM Sales

Giving Users Access to PeopleSoft CRM Sales

To use PeopleSoft CRM Sales, you first need to provide each user with a PeopleSoft CRM Person ID and a PeopleSoft User ID. This section gives an overview of that process, most of which you perform using the standard PeopleTools security components.

To give a user access to PeopleSoft CRM Sales

1. Add the user as a PeopleSoft CRM worker by assigning a Person ID.

   Select **Manage Workforce, Manage Workforce, Use, Worker.**

   For more information, see Managing Workers in *PeopleSoft CRM Application Fundamentals*.

   ---

2. Create a User ID for each person who will access PeopleSoft CRM Sales.

   Select **PeopleTools, Maintain Security, Use, User Profile.**

   For more information about creating User IDs, see Security in the *PeopleTools PeopleBook*.

   ---

3. Associate the User ID with the Person ID that refers to the same person.

   The ID page in the User Profile component enables you to associate the two IDs. Select *Person* from the **ID Type** box, then select the Person ID you assigned to this person in step 1.

4. Assign the appropriate role to the user.

   The Roles page in the User Profile component enables you to assign a role to the user. The assigned role determines what parts of the system the user has access to.

   PeopleSoft CRM Sales delivers a number of standard roles, each of which provides access to the parts of the system that type of user typically needs access to. The standard roles are:

   - Channel Sales Manager
   - Field Sales Representative
   - Inside Sales Representative
   - Lead Qualifier
   - Sales Application Administrator
   - Sales Manager

   You can, of course, modify the security permissions associated with any of these roles, or create new roles and assign them to users.

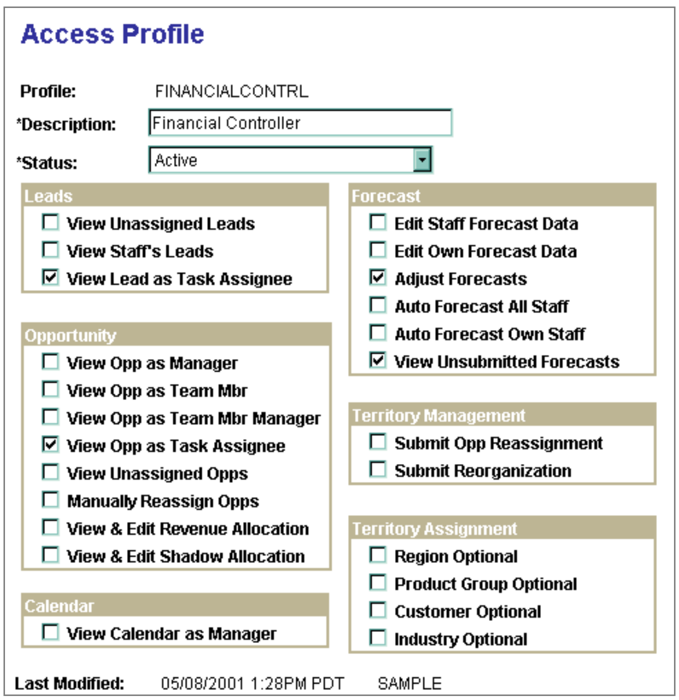
   For more information about which areas of the system each of these roles has access to, see Setting Up Security in the *PeopleSoft CRM Application Fundamentals PeopleBook*. For more information about modifying roles and permissions, see see Security in the *PeopleTools PeopleBook*.

Creating Access Profiles

By giving a user a User ID, you define which parts of the *application* that person has access to — for example, which menus and which pages. The next step is to define what *data* the person has access to — for example, which leads and which opportunities. You accomplish this by creating *access profiles* and assigning them to the sales user.

Access Profile Page

Usage	Use the Access Profile page to select the types of information that people in particular job roles have permission to see.
Object Name	RSF_ACC_PROFILE
Navigation	**Define Business Rules, Structure Sales Force, Use, Access Profiles**



Access Profile page

Enter the **Description** to the security or access profile. We recommend that the description you assign to the access profile resemble the role name that you assigned for menu access in PeopleTools.

Select whether the profile's **Status** is ***Active*** or ***Inactive.*** You select levels of access within **Leads, Opportunity, Calendar, Forecast,** and **Territory Management** by selecting the appropriate check boxes.

Note. You must also have appropriate PeopleTools security privileges in order to perform the actions that your access profile gives you rights to.

Leads

View Unassigned Leads	Access unassigned leads in addition to your assigned leads.
View Staff's Leads	Access the leads of people reporting to them as set up in a territory tree.
View Lead as Task Assignee	Access for someone who has been assigned tasks that support the progress of a lead to becoming an opportunity.

Opportunity

View Opp as Manager (view opportunities as manager)	Access the opportunities of people reporting to them, as set up in a territory tree.
View Opportunities as Team Member	Access to opportunities where the representative is a team member. **For more information** about setting up sales teams, see Sales Team Page.
View Opportunities as Team Member Manager	Access the opportunities that your staff members support. For example, you might manage sales support staff such as presales consultants.
View Opp as Task Assignee	Enables user to view an opportunity where a supporting task has been assigned to them.
View Unassigned Opps	Access to unassigned opportunities in addition to their assigned opportunities. An unassigned opportunity does not have a primary sales representative assigned.
Manually Reassign Opps	Manually reassign opportunities from one representative to another. This option is usually reserved for managers.
View & Edit Revenue Allocation	Enables the user to view and edit revenues percentages allocated to sales team members on specific opportunities. This option is usually reserved for managers.
View & Edit Shadow Allocation	Enables the user to view and edit shadow percentages and amounts allocated to sales team members on specific opportunities.

Calendar

View Calendar as Manager	Select this check box so that the profile can view the calendar entries of people reporting to them, as set up in the territory tree. A manager would select Person A and could then view Person A's calendar. However, Person A's calendar would not merge with the manager's calendar.

Forecast

Edit Staff Forecast Data	Enables you to make changes to the forecast data of all people reporting to you as defined in a territory tree. Typically, this would be a managerial or sales administrative function.
Edit Own Forecast Data	Enables you to make changes to your own forecast data, as in the case of a sales representative.
Adjust Forecasts	Enables you to make adjustment entries to groups of forecast entries; for example, a manager might decrease the department's forecast by 10 percent in the case of an economic slowdown.
Auto Forecast All Staff	Enables managers to create a system forecast that includes the data of people reporting to them who have not officially submitted their opportunity data for forecast. Auto Forecast also prevents a person who did not submit forecasts from submitting them a second time.
Auto Forecast Own Forecasts	Enables one to create a system forecast even if they have not officially submitted their opportunity data for forecast.
View Unsubmitted Forecasts	Enables you to view saved but unsubmitted forecasts of those who are reporting to one as defined in the company's territory tree.

Territory Management

Submit Opp Reassignment	Enables you to reassign opportunities between staff members. Selecting this check box enables you to click the **Submit** button on the Reassignment page.
Submit Reorganization	Enables you to reorganize territories within the company; for example, from being based on geography to being based on product line. Selecting this check box enables you to click the **Submit** button on the Reorganization page. Your company may benefit from splitting the responsibility for setting up reorganizations, which can be saved as worksheets, from the responsibility of executing the reorganization.

Territory Assignment

The **Territory Assignment** check boxes determine which fields are required or optional before the system automatically assigns sales representative to leads or opportunities. If a check box is clear (not selected), that means that it is required before system assignment can occur. The system assigns leads and opportunities based on combinations of region, product group, customer, and industry.

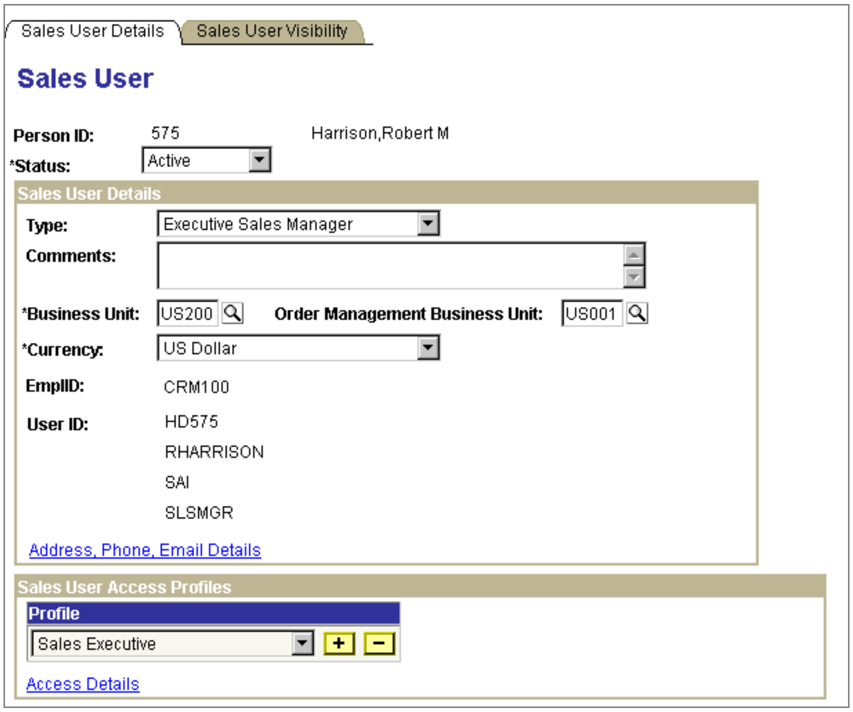
Region Optional	Select Region Optional if it will not be required for the system to assign sales representative to leads or opportunities.
Product Group Optional	Select Product Group Optional if it will not be required for the system to assign sales representative to leads or opportunities.
Customer Optional	Select Customer Optional if it will not be required for the system to assign sales representative to leads or opportunities.
Industry Optional	Select Industry Optional if it will not be required for the system to assign sales representative to leads or opportunities.

Defining Sales Users

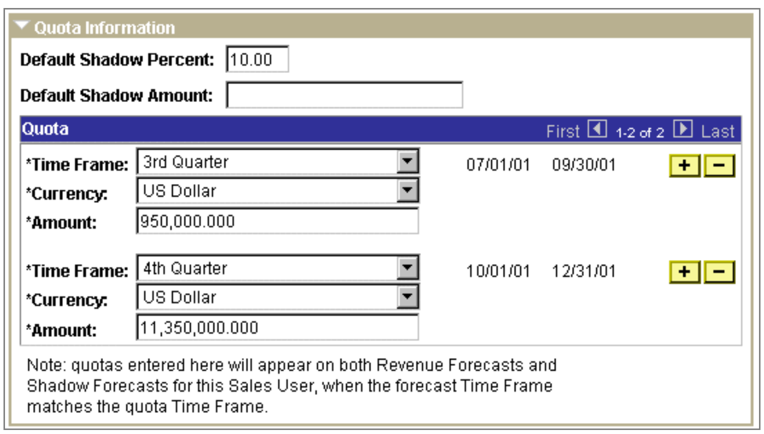
You have created a Person ID and a PeopleSoft User ID for each person who will be using PeopleSoft Sales. You have defined access profiles that specify what different types of users are allowed to see. The next step is to provide details about each sales user: their job category, access profile, and quota information.

Sales User Details Page

Usage	Use the Sales User Details page to enter users into PeopleSoft CRM Sales.
Object Name	RSF_USER
Navigation	**Define Business Rules, Structure Sales Force, Use, Sales Users**
Prerequisites	For each user of PeopleSoft CRM Sales, complete the PeopleTools setup and create a Person ID.



Sales User Details page (1 of 2)



Sales User Details page (2 of 2)

Sales User Details

Type Select the type of user from the following options:

Executive Sales Manager

Field Sales Rep (field sales representative)

Inside Sales Rep (inside sales representative)

Pre-Sales Consultant

Sales Administrator

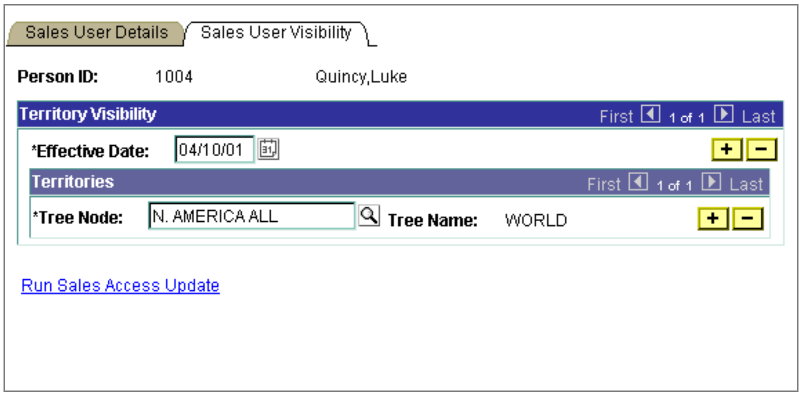
	Sales Manager
	Sales Tech Support (sales technical support)
	TeleSales Rep (telemarketing sales representative)
Comments	Record comments about this user's profile.
Business Unit	Select the business unit of which the user is a member. This business unit defaults onto each lead or opportunity that a sales representative creates. The business unit also defines the setID for customers and products. For more information about business units, see Sales Definition Page.
Currency	Sets the default currency that is associated to a sales representatives on their leads and opportunities. The default currency is also set for sales managers who perform forecasts that might include representatives who work with other currencies.
Profile	Select this user's access profile. Access profiles are user-defined. Click the **Access Details** link to go the Access Details page, listing the levels of access.

Quota Information

Default Shadow Percent	Enter the shadow percent that will automatically default when the sales user is added as member of an opportunity.
Default Shadow Amount	Enter the shadow amount that will automatically default when the sales user is added as member of an opportunity.
Time Frame	Select the forecast time frame that applies to the user's quota. For more information, see Report Timeframes Page.
Currency	Select the currency in which the user's quota is measured.
Amount	Enter the amount of the user's quota.

Sales User Visibility Page

Usage	You use the second page in the Sales User component to specify which territory or territories this user can view data from.
Object Name	RSF_SUSER2
Navigation	**Define Business Rules, Structure Sales Force, Use, Sales User, Sales User Visibility**
Access Requirements	Select a person ID.



Sales User Visibility page

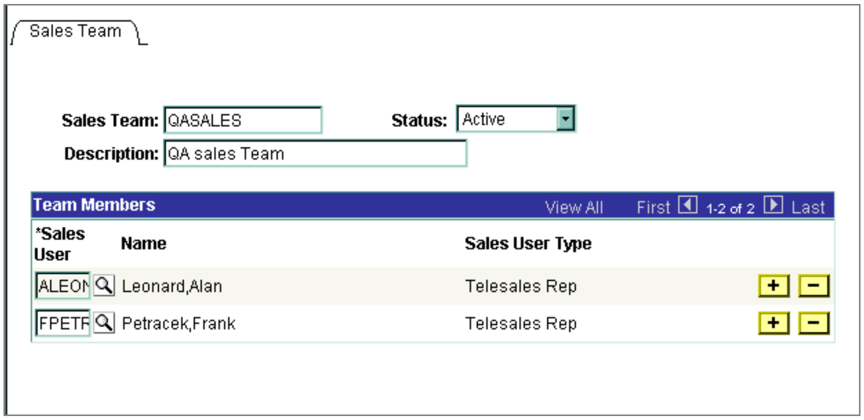
You need to define your sale's organization's territory tree before you can complete this page.

For more information about setting up territory trees, see Working with Territory Trees.

Effective Date	Select the effective date of the user profile. This field is useful for setting up profiles that will take effect sometime in the future; for example, when a transfer to a new division or a promotion takes effect.
Tree Name	The name of your organization's territory tree appears by default.
Tree Node	Select the node of the territory tree, specifying this user's place in the reporting structure. To give this user access to more than one territory, click the + button to add another node.
Run Sales Access Update	Click this link to launch the Application Engine process that updates changes in sales user access details. For more information about the sales access update process, see Sales Access Update Page.

Sales Team Page

Usage	Use the Sales Team page to group multiple users together as a sales team.
Object Name	RSF_TEAM
Navigation	**Define Business Rules, Structure Sales Force, Use, Sales Team**



Sales Team page

Creating a sales team enables you to assign a group of sales users to an opportunity all at once. Once you add a sales team to an opportunity, you can add or delete team members as necessary. Changes that a sales representative makes to the sales team on the Opportunity Detail page will not change team members on the Sales Team page.

Sales Team Assign a name to your grouping of sales users.

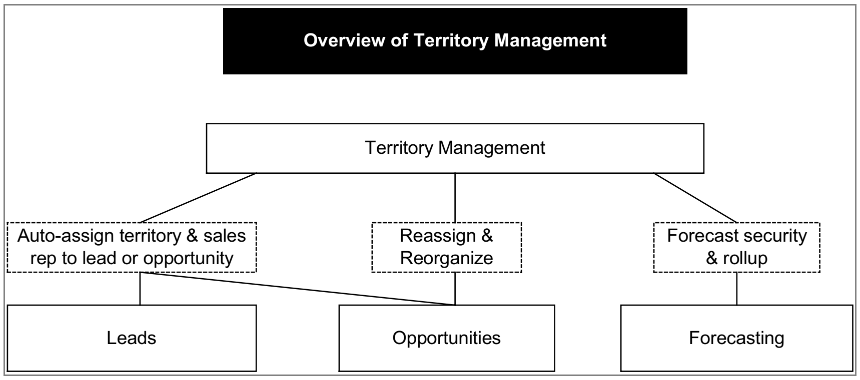
Status Select whether the sales team designation is ***Active*** or ***Inactive.***

Description Enter more descriptive name for your sales team than the truncated name of the Sales Team field.

Sales User Select your **Team Members** from previously created Sales Users. Click the + button to add team members or the − button to delete them.

Defining Your Organizational Structure

What data a user should have access to depends critically on where that user fits into the overall structure of your sales organization. Therefore, before you can provide data access to users, you need to describe certain aspects of your sales organization, most notably what business units you have and how you divide your organization into territories. You organize reporting relationships of people into territory trees, which will shape how your business organizes the management of leads, opportunities, and forecasting. The territory tree will become a systemic map of your organization.



Overview of territory management

To define your organizational structure

1. Create business units.

   Navigate to **Define Business Rules, Establish Business Units, Use, SFA Definition.**

2. Define the items that distinguish territories from one another.

   Different sales organizations use different criteria to divide their sales activities: by product line, by geographic region, by customer, or by industry. Before you build your territory tree, you must define the items that distinguish one territory from another; for example, if your territories are based on customers, you must first define the customers.

   Which pages you use to define these items depends on which criteria you are using. You can access any of these pages from the Territory Management Home page (**Manage Sales, Manage Sales Territory, Use, Territory Management Home Page**).

3. Create the root node of the territory tree.

   Navigate to **Manage Sales, Manage Sales Territories, Use, Create Territory Tree.**

4. Build the tree structure by specifying the hierarchical relationships between the territories.

   You build the tree structure using the PeopleSoft Tree Manager, which you can reach from the Create Territory Tree page.

5. Associate each sales user with a business unit, a territory, and an access profile.

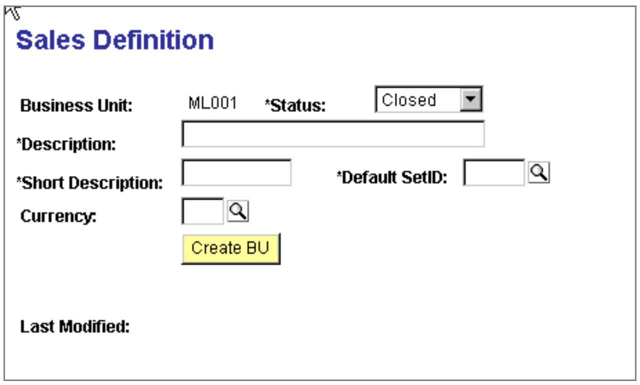
   To complete this step, return to the Sales Users component (**Define Business Rules, Structure Sales Force, Use, Sales Users).**

6. Run the sales access update.

   Navigate to **Define Business Rules, Structure Sales Force, Process, Sales Access Update.**

Sales Definition Page

Usage	Use the Sales Definition page to enter your company's business unit into PeopleSoft CRM Sales.
Object Name	RSF_BUS_UNIT_TBL
Navigation	**Define Business Rules, Establish Business Units, Use, SFA Definition**
Access Requirements	Enter a business unit ID. **Note.** For best performance, we recommend that your business unit IDs be exactly five alphanumeric characters.



Sales Definition page

Note. Sales business units are used in PeopleSoft CRM Sales to determine the list of customers (customer setID) and the list of products (product setID) that a sales representative can sell. The PeopleSoft customer and product tables are keyed by setID, which are derived from business units. If your company uses more than one PeopleSoft application and defines the same business units across applications, ensure that you use the same name for business units designed to share the same setID.

If sales representatives can sell to the whole customer list and can sell the whole list of products, that implies that your company needs only one business unit. However, if your company needs to keep its list of European customers separate from its list of American customers, you can create a customer setID EU and a Sales business unit EUSLS, which points to the customer list. Then you can assign the business unit to all of your sales representatives in Europe; they can prompt only on the list of European customers.

Status Indicates whether the organization represented by the business unit is ***Open*** or ***Closed***. No new transactions can be processed for a ***Closed*** business unit.

Description The long description of the business unit. When you add a business unit, you can enter a long description using up to 30 alphanumeric characters.

Short Description The short description of the business unit. When you add a business unit, you can enter a short description using up to 10 alphanumeric characters.

Default SetID The setID that determines your preliminary TableSet sharing setup. The system displays this field when you open the page in Add mode. The setID you select determines your preliminary TableSet sharing setup by determining the setIDs assigned to each record group for the new business unit. The setID assigned to a record group determines which TableSet is used as valid values for that specific business unit. If you enter a value that is equal to an existing business unit, it uses the set control definition of that business unit and copies it to the new business unit.

For more information about setIDs and tableset controls, see Planning Records, Control Tables, and TableSets in the *PeopleTools PeopleBook.*

Create BU (create business unit) Click this button to establish the setID controls for the business unit based on the **Default SetID** you specify.

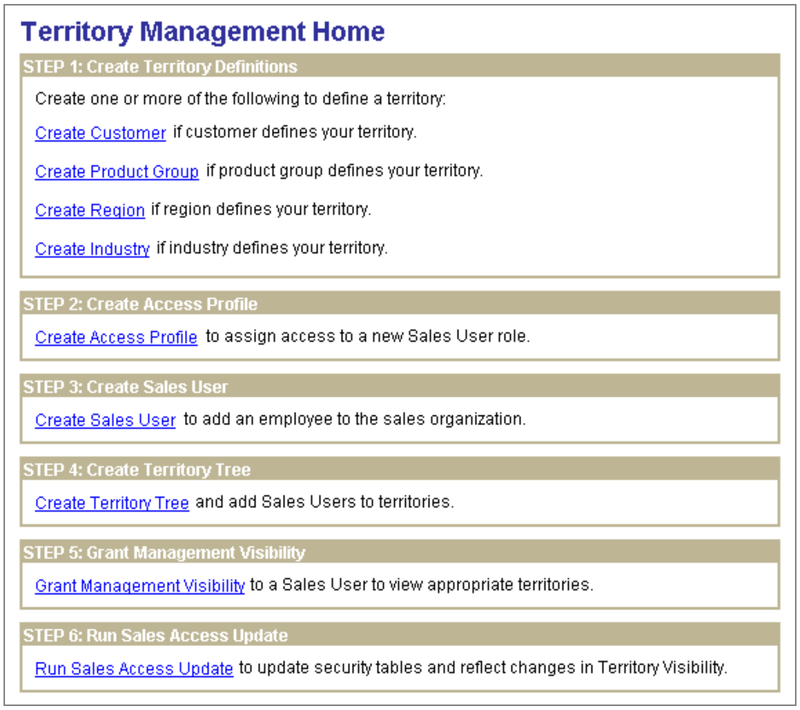
Note. You must click the **Create BU** button before you can specify the **Status**, or select the **Automatic Receiving** option.

Currency Select the currency in which this business unit conducts business.

Note. The **Default SetID** and **Create BU** controls appear on the page only when you initially create the business unit. They do not appear if you return to view the details of an existing unit.

Territory Management Home Page

Usage	Use the Territory Management Home page to create territory definitions, sales users, territory trees, and assign security. This page is particularly useful for first-time setups.
Object Name	RSF_TR_HOME
Navigation	**Manage Sales, Manage Sales Territory, Use, Territory Management Home**



Territory Management Home page

Create Customer

Create Product Group

Create Region

Create Industry

The four links under **STEP 1: Create Territory Definitions** provide shortcuts to the setup pages for the types of items you can choose to use to define your territories. For example, if you have geographically based territories, click the **Create Region** link to go to the Region setup page. On that page you create regions, which you then build into the territory tree.

For more information about using the Industry page to define your territory, see Defining the Business Environment in this PeopleBook. For information about customers, product groups, and regions, see *PeopleSoft CRM Application Fundamentals PeopleBook*.

Create Access Profile

Click the **Create Access Profile** link to go to the Access Profiles page to set up or assign access to a new sales user in the system.

Create Sales User

Click the **Create Sales User** link to go to the Sales User page to add an employee to the sales organization.

Create Territory Tree

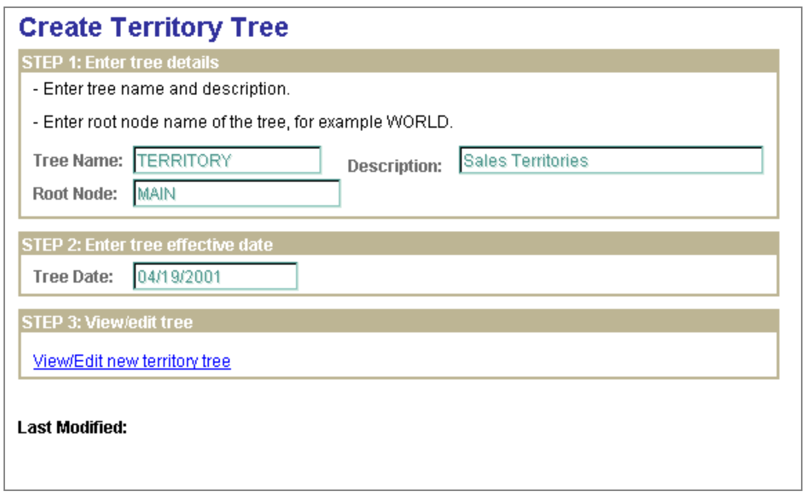
Click the **Create Territory Tree** link to go to the Create Territory Tree page to add sales users to territories.

Grant Management Visibility

Click the **Grant Management Visibility** link to add sales users to a specific level of the territory tree on a view-only basis; for example, a senior manager may want such access. This link takes you to the Sales User Visibility page, where you can add additional nodes to the user's definition.

Create Territory Tree Page

Usage	Use the Create Territory Tree page to set up your organization's territory tree.
Object Name	RSF_TR_NEW_TREE
Navigation	**Manage Sales, Manage Sales Territories, Use, Create Territory Tree**



Create Territory Tree page

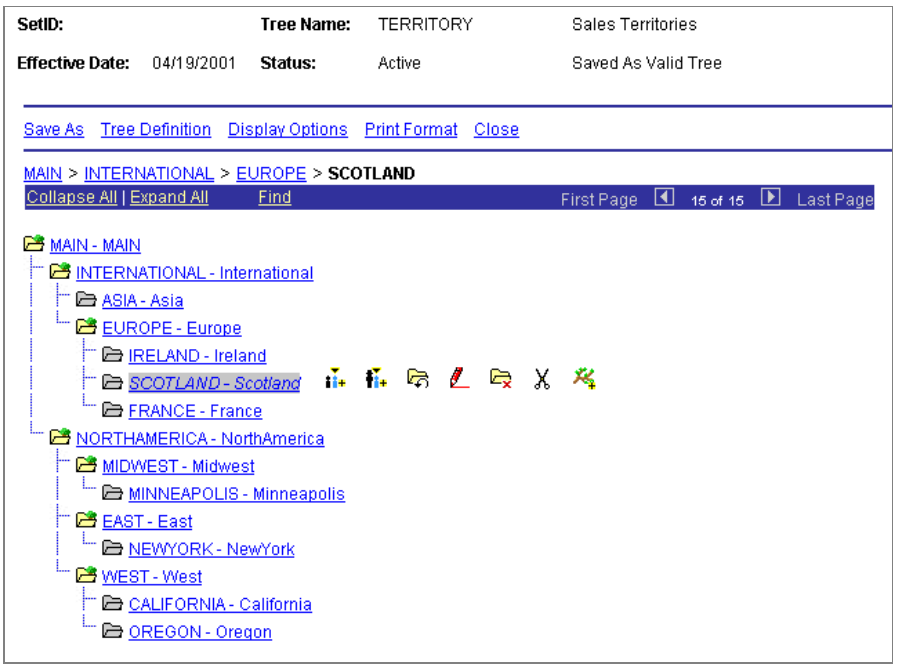
You use this page to define the basics of your territory tree: the **Tree Name** and description, the name of its **Root Node**, and the date when the tree goes into effect (**Tree Date**). When you have entered this information, click **View/Edit new territory tree** to start building the tree structure.

Important! Once your company defines and creates a territory **Tree Name,** only that tree name can be used for territory management. Renaming the tree will invalidate much of the processing logic related to assignments and reorganization. To make changes to the territory tree, create a new *version* of the tree using a new effective date without changing the name.

When you return to this page after creating your territory tree, the fields appear as read-only; however, the **View/Edit new territory tree** link is still available, and takes you to the tree you created earlier.

View/Edit Territory Tree Page

Usage	Use the View/Edit Territory Tree page to define the hierarchical structure of your company's territory tree.
Object Name	PSTREEMGR
Navigation	Click the **View/Edit new territory tree** link or **Manage Sales, Manage Sales Territories, Use, View/Edit Territory Tree**
Access Requirements	Select an effective date.



View/Edit Territory Tree page

Note. SetID is left blank because Territory trees are not dependent on setIDs.

This page displays your territory tree using the PeopleSoft Tree Manager, which you use to specify the hierarchical relationships between the territories in your sales organization.

For more information about using PeopleSoft Tree Manager, see Tree Manager in the *PeopleTools PeopleBook.*

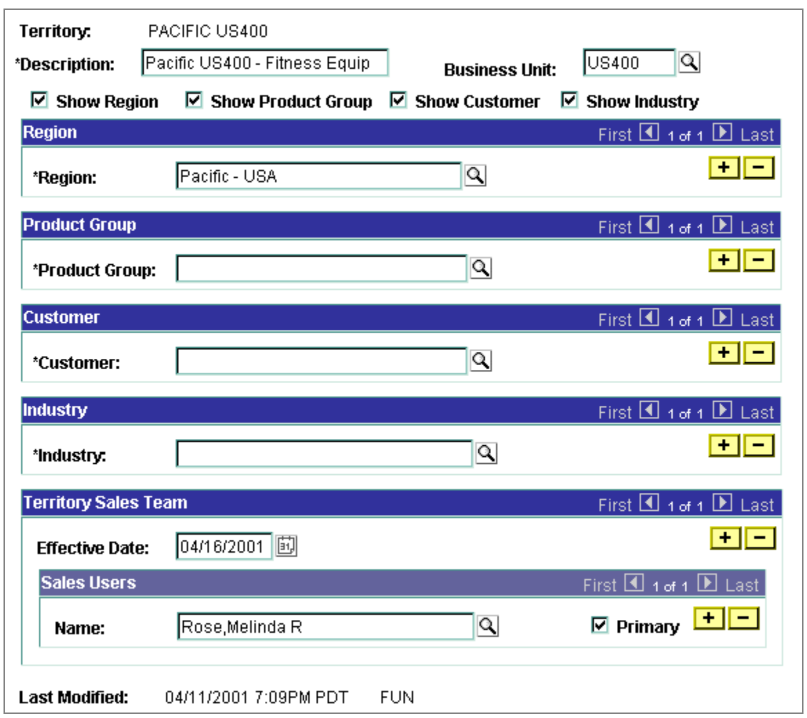
You add territories to the tree starting from the root node. The territories directly under the root node are the high-level territories, with the smaller territories that roll-up into them showing as their "children."

As you add each node in its proper place in the hierarchy, click to define the details about that node. See the next section for details.

Important! Do not use the Save As option to rename your territory tree. Once your company defines and creates a territory **Tree Name,** only that tree name can be used for territory management. Renaming the tree will invalidate much of the processing logic related to assignments and reorganization. To make changes to the territory tree, create a new *version* of the tree using a new effective date without changing the name.

Territory Tree Page

Usage	Use the Territory Tree page to provide details about a node in your territory tree, which represents a particular territory.
Object Name	RSF_TERRITORY
Navigation	**Click the icon.**



Territory Tree Page

Description Description of the territory you selected from the territory tree.

Business Unit The business unit whose product groups or customers you want to see listed in those sections. If the territory you are defining is not based on a customer or product group, you can leave this field blank.

Show Region

Show Product Group

Show Customer

Show Industry

These four check boxes specify which of the corresponding group boxes is active. Which check box you select depends on how you divide your sales organization into territories. Select the box corresponding to the type of item you want to select as defining this territory. For example, if you have geographically based territories, select **Show Region**, then select a region from the **Region** list.

Territory Sales Team

Use this group box to associate sales users with this territory.

Effective Date Whenever you make changes to the territory sales team, specify the date on which these changes should take effect.

Name Enter the name of a sales representative associated with this territory. Click the + button to add additional sales representatives.

Primary If this territory is the sales representative's primary territory, select this check box.

Last Modified is a display-only field (populated by the system) that lists the user sign-on of the last person to change the territory information on this page. The date and time of the change are also displayed.

Note. In View/Edit Territory Tree, you are on a PeopleTools page, which does not provide a back button to specific applications like PeopleSoft CRM Sales. To return to PeopleSoft CRM Sales, click your browser's Back button or click the Use link.

Sales Access Update Page

Usage	Use the Sales Access page to launch the Application Engine process, which combines user identities with access permissions.
Object Name	RSF_ACCESS_RUN
Navigation	**Define Business Rules, Structure Sales Force, Process, Sales Access Update**

Sales Access Update page

Enter a run control ID and click the **Run** button.

Note. The Sales Application Administrator who runs the Sales Access Update RSF_ACCESS Application Engine job must have the Process Profile, Primary, and Row Security permission lists set to *ALLPANLS* to run this job (as well as having the Sales Application Administrator Role with the CRRS9000 Permission List).

Managing Your Territory Tree

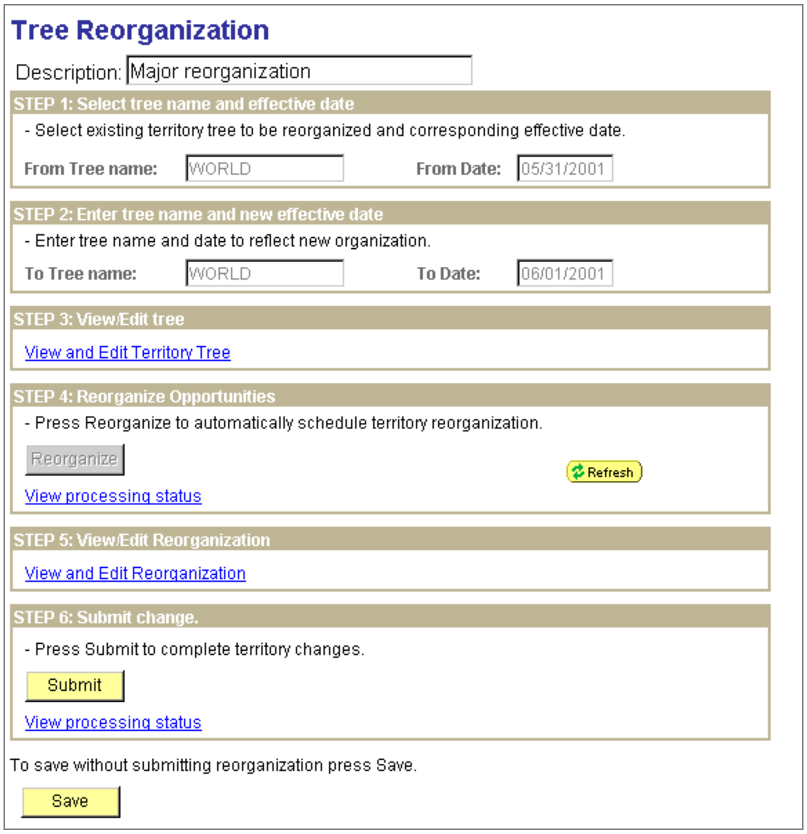
Periodically you may need to make changes to the structure of your territory tree or move opportunities from one territory to another. The pages described in this section enable you to make these changes.

Here are some guidelines for things to check before you reorganize your territory tree:

- Check data in the opportunity header and team for the primary sales representatives that are going to be reorganized.
- If your territory is defined by Customer, Region, Industry, Product Group, make sure there are values for them in the header for each opportunity of all primary sales representatives. Make sure that these values match with your territory tree definitions.
- Check territory sales team in the territory tree to ensure appropriate sales representatives belong to each territory.
- Each sales representative should have appropriate territory populated on the opportunity. This becomes the **From Territory** used in the reorganization and the corresponding sales representative is considered as the **From Rep**.

Tree Reorganization Page

Usage	Use the Tree Reorganization page to make changes to your company's territory tree to match the changes in your business as of a certain date.
Object Name	RSF_TR_REORG
Navigation	**Manage Sales, Manage Sales Territories, Use, Reorganize Territory Tree**



Tree Reorganization page

Description Enter a description of the tree reorganization.

From Tree Name The default is the name of your territory tree.

From Date The default is the effective date of the most recent version of the territory tree.

To Tree Name Use the same name as in the **From Tree Name** field.

Important! Once your company defines and creates a territory **Tree Name,** only that tree name can be used for territory management. Renaming the tree will invalidate much of the processing logic related to assignments and reorganization. To make changes to the territory tree, create a new *version* of the tree using a new effective date without changing the name.

View and Edit Territory Click this link to go to the View and Edit Territory page, where you can move and edit tree nodes to match the changes in your business organization. See View/Edit Territory Tree Page.

Reorganize Click the **Reorganize** button to launch the system processes that cause changes to your company's territory tree.

When you click the **Reorganize** button, the Reorganize, Submit, and Save buttons become unavailable while the system processes the changes. Reorganization changes only the statuses and opportunities of primary sales representatives. A sales administrator needs to manually edit any corresponding changes in sales teams.

Clicking the **Reorganize** button triggers an application engine process to run in the background. After this process has completed, check the results in the worksheet. Proceed to next step if the results are as you expected.

View processing status Click this link to go to the Process Request page.

On the Process Request page, the Run Control ID is *REORG<process_instance>*, where *<process_instance>* is the process instance number created by the system. If the Application Engine process fails, go back to the Tree Reorganization page and click the Reorganize button to enter the worksheet for processing. Return to Process Monitor and validate that the Application Engine process was successfully completed. Then review the worksheet by clicking the **View and Edit Reorganization** link.

For more information about the Process Request page, see *PeopleTools Process Scheduler PeopleBook,* "Process Scheduler Basics."

View and Edit Reorganization Click this link to go to the Reassignments Detail page, where you can see the list of opportunities that are affected by the reorganization.

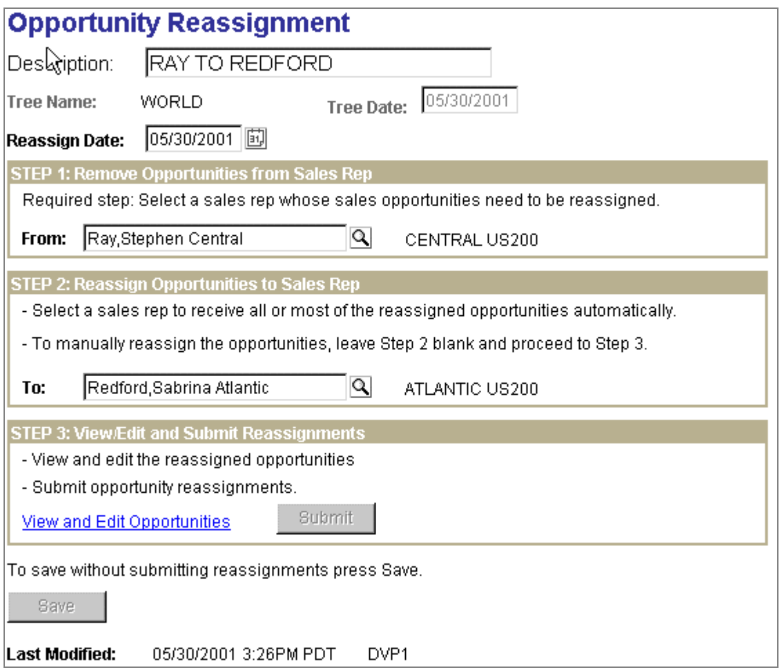
Submit Launches or executes the reassignment in the system.

The **Submit** button triggers another application engine batch process that actually updates the opportunity records.

Save Saves the reorganization as a draft or worksheet.

Opportunity Reassignment Page

Usage	Use the Opportunity Reassignment page to move opportunities from one representative to another; for example, when a representative is promoted to another division. **Note.** All reassignments and realignments have a unique identifier and are stored for preview and history.
Object Name	RSF_TR_CHANGE
Navigation	**Manage Sales, Manage Sales Territories, Use, Reassign Opportunities**



Opportunity Reassignment page

Description Enter a description of the opportunity reassignment.

From Select from whom the opportunity is being taken.

To Select to whom the opportunity is being assigned.

View and Edit Opportunities Click this link to go to the Reassignments page, where you can work with the individual opportunities.

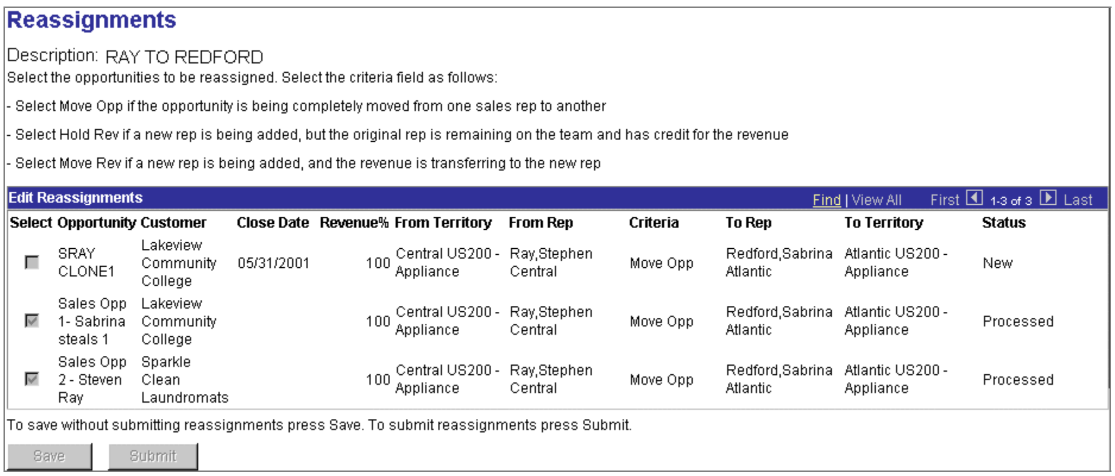
Submit — Click the **Submit** button to execute the opportunity reassignment.

Save — Click the **Save** button to save your work as a draft.

Note. You must click the **Submit** button to actually perform the opportunity reassignment.

Reassignments Page

Usage	Use the Reassignments page to select and edit opportunities that are being reassigned from one representative to another.
Object Name	RSF_TR_CHG_DTL
Navigation	Click the View and Edit Opportunities link.


Reassignments

Description: RAY TO REDFORD

Select the opportunities to be reassigned. Select the criteria field as follows:

- Select Move Opp if the opportunity is being completely moved from one sales rep to another
- Select Hold Rev if a new rep is being added, but the original rep is remaining on the team and has credit for the revenue
- Select Move Rev if a new rep is being added, and the revenue is transferring to the new rep

Edit Reassignments — Find | View All — First 1-3 of 3 Last

Select	Opportunity	Customer	Close Date	Revenue%	From Territory	From Rep	Criteria	To Rep	To Territory	Status
	SRAY CLONE1	Lakeview Community College	05/31/2001	100	Central US200 - Appliance	Ray,Stephen Central	Move Opp	Redford,Sabrina Atlantic	Atlantic US200 - Appliance	New
✓	Sales Opp 1- Sabrina steals 1	Lakeview Community College		100	Central US200 - Appliance	Ray,Stephen Central	Move Opp	Redford,Sabrina Atlantic	Atlantic US200 - Appliance	Processed
✓	Sales Opp 2 - Steven Ray	Sparkle Clean Laundromats		100	Central US200 - Appliance	Ray,Stephen Central	Move Opp	Redford,Sabrina Atlantic	Atlantic US200 - Appliance	Processed

To save without submitting reassignments press Save. To submit reassignments press Submit.

Save Submit

Reassignments page

Select — Click **Select** to edit an opportunity or mark it for reassignment.

From Rep (from representative) — Representative that the opportunity comes from.

To Rep — Representative who receives the opportunity.

Criteria — Select the **Criteria** that is associated with how an opportunity is reassigned to a representative. Criteria relates to the representative who receives financial credit for an opportunity. Options are as follows:

Move Opp (move opportunity): The opportunity is being completely moved from one sales representative to another.

Hold Rev (hold revenue): A new primary representative is being added, but the original representative remains on the team and still receives credit for the revenue.

Move Rev (move revenue): A new primary representative is being added, and the revenue is being transferred to the new representative.

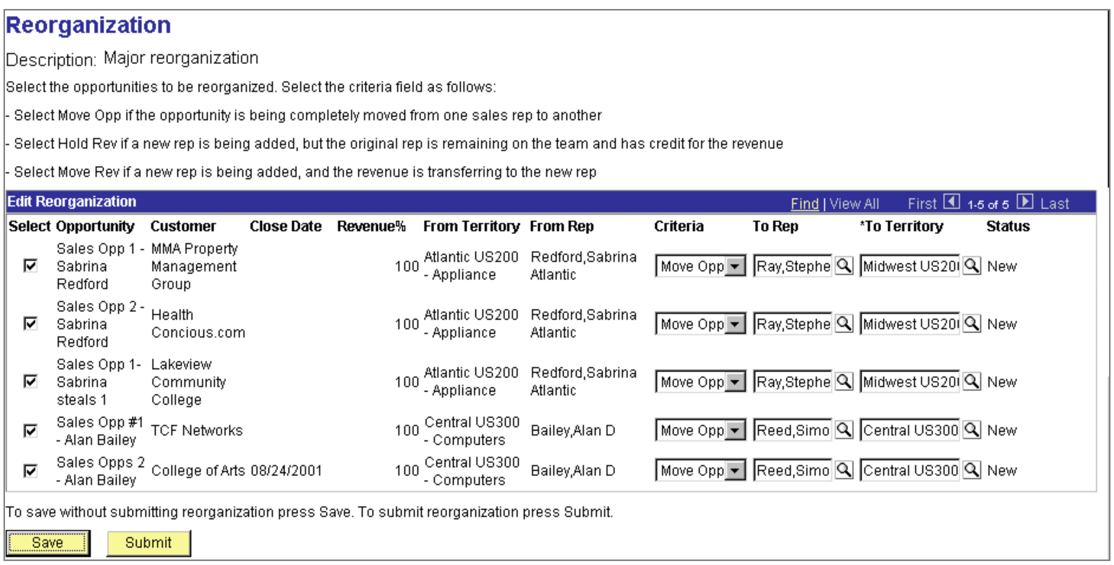
Status The system displays the reassignment's status: ***New, Processed,*** or ***Skipped.***

Save Click the **Save** button to save the reassignment as a draft or worksheet.

Submit Click the **Submit** button to launch or execute the reassignment in the system.

Reorganization Page

Usage	Use the Reorganization page to select and edit opportunities that are being reassigned from one representative to another.
Object Name	RSF_TR_REORGDTL
Navigation	Click the View and Edit Reorganization link.



Reorganization page

The Reorganization page has the same functionality as the Reassignments page.

For information about the page elements on the Reorganization page, see the Reassignments Page.

CHAPTER 3

Defining the Business Environment

In the previous chapter you defined the structure of your sales organization. In this chapter, you define key aspects of the environment in which you do business. You enter information about:

- The stages and tasks that make up your sales model
- The partners you work with
- The industries you sell into
- The products you sell

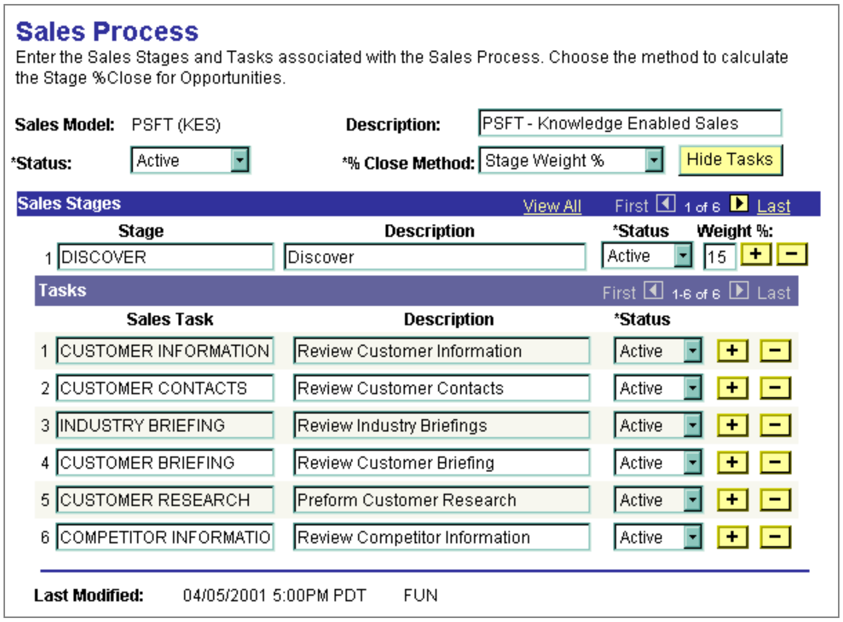
Defining the Sales Model

To help you track opportunities through the sales process, the system needs to know the key stages and tasks of your sales process. The Sales Process page enables you to enter this information.

By default, PeopleSoft CRM Sales delivers the Knowledge Enables Sales (KES) model. However, using the Sales Process page, you can enter the stages and tasks for any sales model.

Sales Process Page

Usage	Use the Sales Process page to enter the stages and tasks of your company's sales process.
Object Name	RSF_SALES_MODEL
Navigation	**Define Business Rules, Structure Sales Force, Use, Sales Process**



Sales Process page

Note. The screen shot above show the first stage of the KES model as delivered with PeopleSoft CRM Sales for illustrative purposes. You can see the complete model on the Sales Process page.

Header Section

The information in the top section of the page relates to the sales model as a whole. You can enter a **Description** and specify whether this model is *Active* (available for use) or *Inactive*.

The **% Close Method** field enables you to specify how the system evaluates the progress of an opportunity based on the stage and task assigned to that opportunity. The available options are:

Stage Weight %

The % Close value for an opportunity is determined by adding together the percentages specified in the **Weight %** field for the each stage the opportunity has passed through.

For example, if the **Weight %** for the second stage of the sales model is 15%, the system adds 15 to the % Close value when the opportunity completes that stage.

Stage Level

The % Close value for an opportunity is determined by the number of stages the opportunity has passed through, compared to the total number of stages. For example, if your sales process has six stages in total, and an opportunity completes stage 3, the % Close value is 50.

Task Level	The % Close value for an opportunity is determined by the number of tasks you have completed for an opportunity, compared to the total number of tasks. For example, if your sales process involves 25 tasks in total, the system adds 4 to the % Close value as you complete each one.
Not Used	If you select **Not Used**, the system will not calculate a % Close value for opportunities.

If you click the **Hide Tasks** button, the page displays only the top-level information for each stage in the sales model. When only the stage-level information appears, the button says **Show Tasks**, and it reverses the effect of the **Hide Tasks** button.

Sales Stages Section

Sales models are divided into major *stages*, and each stage can be divided into multiple *tasks*. To add a new stage, click the + button that appears next to the stage that precedes the stage you want to add. To add a new task to a stage, click the + button next to the task that precedes the one you want to add.

Each stage and each task has a name and a description, and you can specify whether each one is currently *Active* or *Inactive*. Only Active stages and tasks are available for assigning to opportunities, and only they are counted when determining an opportunity's % Close value.

For each stage, you can also provide a **Weight %**, which is used if you selected **Stage Weight %** in the header section; see above for details.

Defining Partners

PeopleSoft CRM Sales enables you to enter basic information about the partners you work with during the sales process. You can identify two types of partners: alliance partners and channel partners.

Once these partners are in your system, you can record which partner generated a specific lead.

Adding Partners to the Sales Organization

Depending on how closely involved they are in the sales process, you may want to add certain partners to your sales team; that is, you may want to give them access to your PeopleSoft CRM Sales system so that you can assign tasks to them and let them see some lead or opportunity data.

For partners that don't need access to the system, simply add their names on the Alliance Partner or Channel Partner page.

To give a partner access to PeopleSoft CRM Sales

1. Add the partner as a Customer.

For more information about creating customers, see Managing Customer Information in *PeopleSoft CRM Application Fundamentals PeopleBook*.

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2. Add the partner as a Contact to the Customer.

3. Set up a PeopleTools User Profile for the lead member or contact..

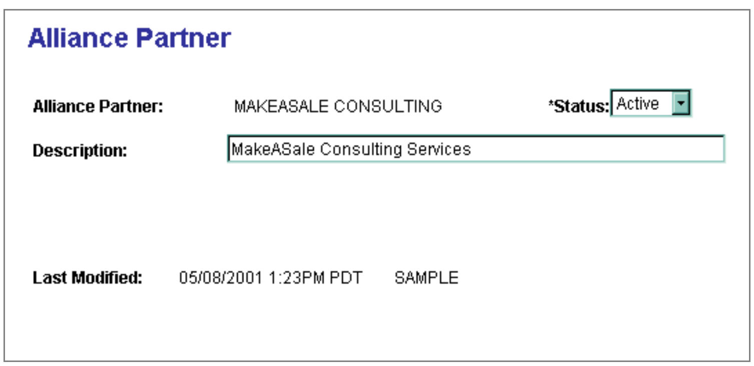
4. Set up the partner as a Sales User.

For more information about create sales users, see the chapter Defining Users and Territories.

Note. Companies may want to create special sales access profiles and permission lists for alliance partners so the range of what an alliance partner can do within the system is very specified.

Alliance Partner Page

Usage	Use the Alliance Partner page to record which companies you are in alliance with, so that you can identify that partner as the source of a lead or opportunity.
Object Name	RSF_ALLNC_PRTNR
Navigation	**Define Business Rules, Sales Force Automation, Use, Alliance Partners**



Alliance Partner page

Only partners whose **Status** is *Active* are available for associating with a lead.

Channel Partner Page

Usage	Use the Channel Partner page to record which companies you partner with, so that you can identify that partner as the source of a lead or opportunity.
Object Name	RSF_CHNL_PARTNR

Navigation	**Define Business Rules, Sales Force Automation, Use, Channel Partner**

Channel Partner page

Only partners whose **Status** is *Active* are available for associating with a lead.

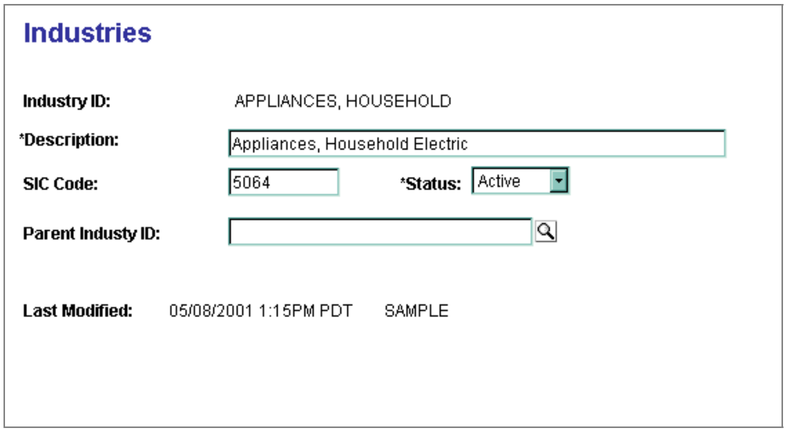
Defining Industries

You use the Industry page to record which industries your company targets for sales. Entering industry information into the system enables you to identify which industry a lead or opportunity relates to. You may even define your sales territories based on the industry each sales team targets.

For more information about using industries to define your territory tree, see Defining Your Organizational Structure in "Defining Users and Territories."

Industry Page

Usage	Use the Industry page to record which industries your company targets for sales. Entering industries is required if you divide your sales organization into industry-based territories.
Object Name	RSF_INDUSTRY
Navigation	**Define Business Rules, Sales Force Automation, Use, Industry**



Industry page

Description	A description of the industry.
Status	Only Active industries are available for assigning to leads or opportunities.
SIC Code	The Standard Industry Classification code for this industry.
Parent Industry ID	The Industry ID of the larger industry of which this industry is a part.

Setting Up for Price Quotes

PeopleSoft CRM Sales draws upon the PeopleSoft CRM Sales Product Configurator to support your company's price quoting requirements. Your sales staff can offer price quotes to customers.

The Product Configurator enables you to define the available components and options for a category of products, and to establish pricing structures for each option.

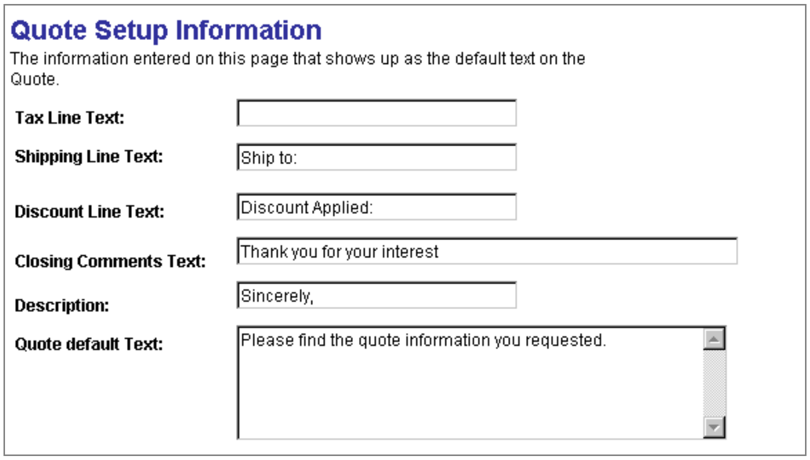
For information about setting up and using the PeopleSoft CRM Sales Product Configurator, see the *PeopleSoft CRM Sales Product Configurator PeopleBook*.

Once you have set up your product information in the Product Configurator, you can use it to create price quotes based on product configuration. You use the Quote Setup Information page to enter the text that will accompany the product and price information in the actual quote you deliver to the customer.

Quote Setup Information Page

Usage	Use the Quote Setup Information page to prepare the default text areas for your

	correspondence that provides quotes to prospects.
Object Name	RSF_QUOTE_SETUP
Navigation	**Define Business Rules, Structure Sales Force, Use, Default Text for Quotes**



Quote Setup Information page

You will see the text you enter here appear as the default text on the Generate Quote page when you create a new quote.

Shipping Line Text	Shipping and handling.
Discount Line Text	Frequent customer discount.
Closing Comments Text	Closing remarks; for example, “We appreciate your continued business.”
Closing	Closing line in your correspondence; for example, “Best regards.”
Quote Default Text	Text that introduces the requested quote information.

For more information about generating quotes, see Generating Quotes in "Managing Opportunities."

Setting Up Prompt Tables

For certain types of information, you want everyone to select from a predefined set of values rather than freely entering a value. For such fields, you define a *prompt table*: a list of the valid values for the field. When a field has a prompt table associated with it, an hourglass icon or down arrow appears next to it on the page, and you select a value from the valid list instead of typing your own value into the field.

Prompt tables serve two purposes:

- They limit the number of separate values for the field, making it easier to analyze the data

For example, the Lead Source field has a prompt table. By making sure that everyone uses the same values for the lead source (instead of entering their own versions), you can analyze which sources are the most productive. If everyone entered their own values, it would be more difficult to determine which ones represented the same sources.

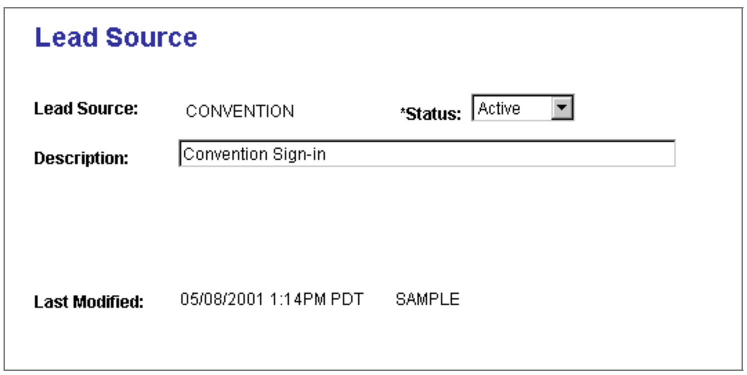
- They provide data validation

For some fields you want to ensure that the user selects a valid option. For example, the Ship Via field has a prompt table that lists all and only the shipping options that are actually available.

This section describes some basic prompt tables you need to set up before you start entering leads and opportunities.

Lead Sources Page

Usage	Use the Lead Sources page to record common sources for leads.
Object Name	RSF_LEAD_SOURCE
Navigation	**Define Business Rules, Sales Force Automation, Use, Lead Sources**



Lead Source page

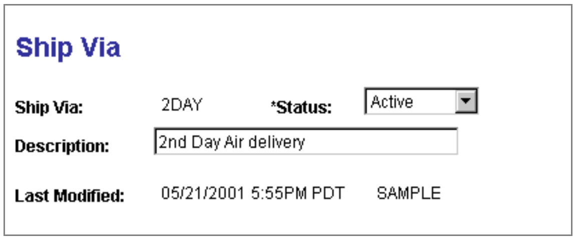
When you enter a lead into the system, you can identify the source of that lead. You select the lead source from the list of sources you define on this page. Only sources whose **Status** is *Active* are available for assigning to a lead.

Working with predefined lead source definitions enables you to analyze how productive the various sources are: you can compare the number of leads coming from each source.

Ship Via Page

Usage	Use the Ship Via page to record the available shipping options for fulfilling customer orders.
Object Name	RSF_SHIP_VIA

Navigation	**Define Business Rules, Sales Force Automation, Use, Ship Via**

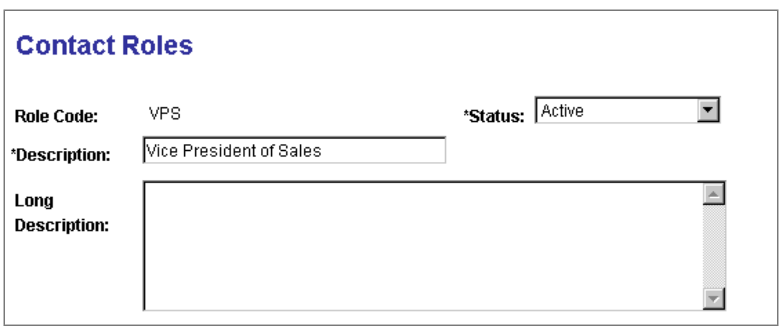


Ship Via page

When you need to send information to a customer or prospect, you must specify the shipping method. You identify the available options on the Ship Via page. Only methods whose **Status** is *Active* are available for use in the system.

Contact Roles Page

Usage	Use the Contact Roles page to enter descriptions of the titles or roles of the people who serve as your contacts at customer sites.
Object Name	RSF_ROLE_CD_TBL
Navigation	**Define Business Rules, Sales Force Automation, Use, Contact Roles**



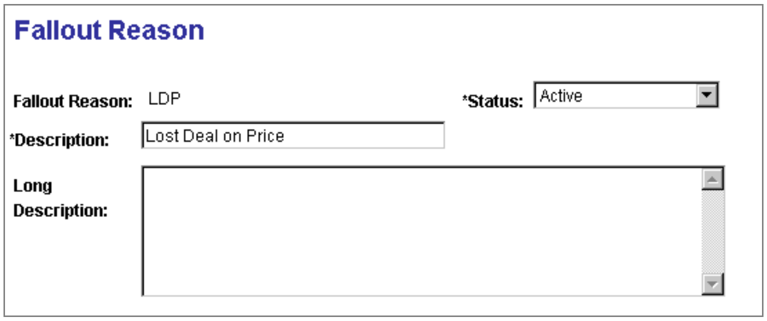
Contact Roles page

When you enter the name of your contact for a lead or opportunity, you can also specify what that person's role or title is. Selecting the role from a predefined list (rather then entering free-form text) makes it easier to analyze trends: you can evaluate the success of opportunities based on the role of your contact person.

Description	The text that will appear on the Lead Detail or Opportunity Detail page when you assign this role to your contact.
Long Description	A more detailed description of the role, for your information only.
Status	Only *Active* roles are available for assigning to contacts.

Fallout Reason Page

Usage	Use the Fallout Reason page to describe common reasons for losing deals.
Object Name	RSF_FALLOUT_RSN
Navigation	**Define Business Rules, Sales Force Automation, Use, Fallout Reason**



Fallout Reason page

When you lose a deal, you need to specify why. You select the primary reason from the list of fallout reasons you define on this page. Working with predefined reason definitions enables you to analyze the most common reasons for losing deals: you can review the number of deals that fall through for each reason.

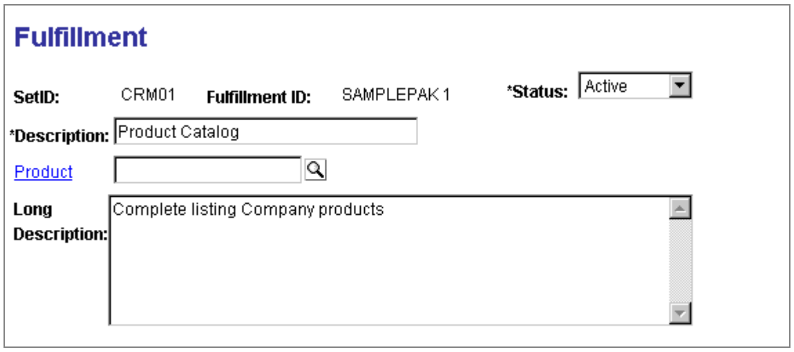
Description The text that will appear in the drop-down list you use to select a fallout reason.

Long Description A more detailed description of the reason, for your information only.

Status Only *Active* reasons are available for assigning to a lost deal.

Fulfillment Page

Usage	Use the Fulfillment page to record the types of items you provide to customers.
Object Name	RSF_FULFILLMENT
Navigation	**Define Business Rules, Sales Force Automation, Use, Fulfillment**



Fulfillment page

In the course of following up on a lead or opportunity, you may need to provide the customer or prospect with various supporting material, such as catalogs or product samples. You define the available promotional material on this page.

Description	The text that will appear in the drop-down list you use to select a fulfillment item.
Product	The product associated with this item. Click the **Product** link to select the product.
Long Description	A more detailed description of the item, for your information only.
Status	Only *Active* items are available for delivery.

CHAPTER 4

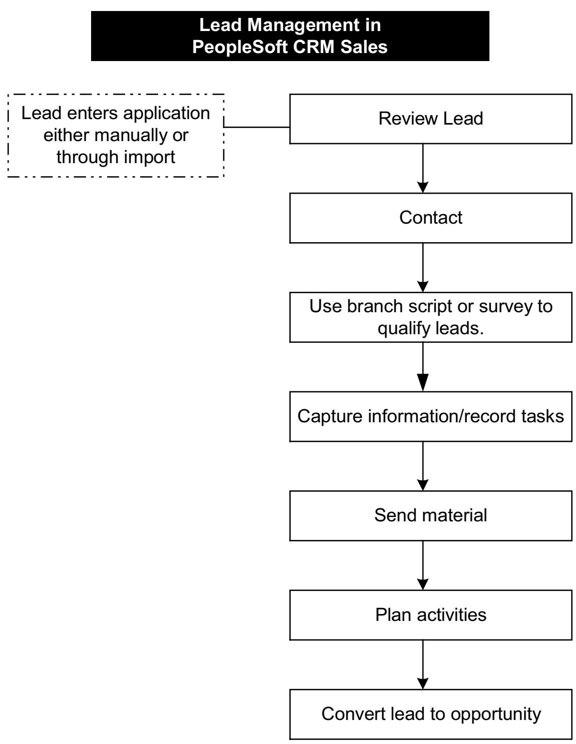
Managing Leads

With PeopleSoft CRM Sales, you can enter and retrieve lead information in a very direct manner.

You can organize your leads by status, by whether they're qualified, or just focus on the hot ones. You can research contact information, company information, and the status of existing leads.

Leads and opportunities populate the sales pipeline. Maintaining a solid lead to opportunity balance is important to promote a predictable close ratio of sales.

After you make headway on a lead, you can capture notes, then easily convert the lead into an opportunity. You can organize your lead lists by a variety of criteria and also export the data to Excel.



Lead Management in PeopleSoft CRM Sales

With Lead Management, you can review your lead information, contact the party (for example via e-mail), capture information, send collateral materials, plan sales activities, and convert your leads into opportunities. In other words, you can manage the evolution of your sales data from its first contact with your organization to changing in quality to becoming a legitimate revenue prospect.

You can capture the supporting efforts involved in your sales process, including future required efforts, through the use of system calendars. You can view a Task History, which shows a history of completed or cancelled tasks. From the Task List menu item, you can view all your tasks for all Leads and Opportunities. From the Calendar, you can view all the tasks assigned to you as well as to your team.

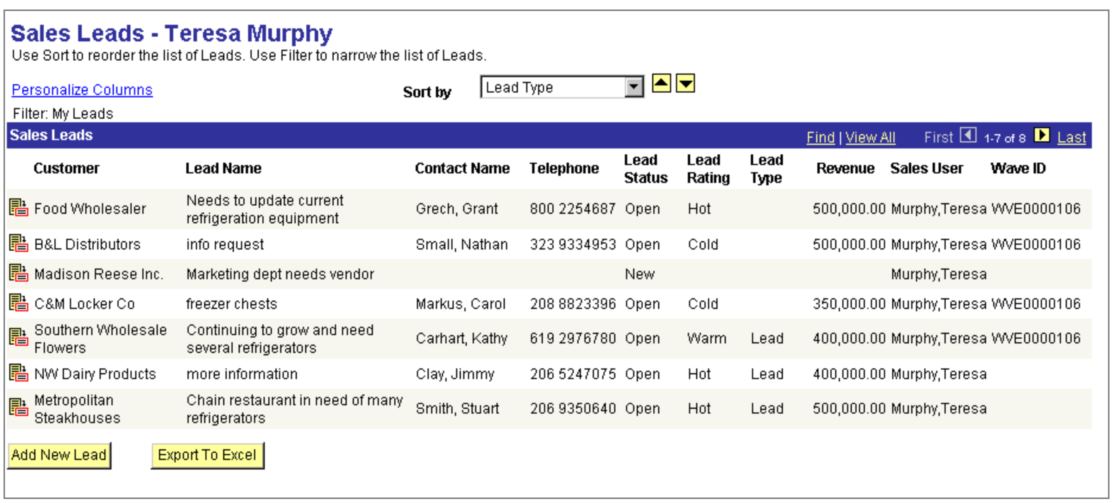
So to summarize, you add tasks to a lead or opportunity, then they will automatically appear in the task list and calendar of the person to whom the task was assigned.

Viewing Leads

The Sales Leads page is your "home page" for managing leads. It displays key information about your leads. You can customize the list to display just the information you want to see and just those leads you want to concentrate on.

Sales Leads Page

Usage	Use the Sales Leads page to access your lead data. You can sort and filter your sales lead information and organize it according to criteria.
Object Name	RSF_LEADS_HOME_GRD
Navigation	**Manage Sales, Manage Sales Leads, Use, Sales Leads**



Sales Leads - Teresa Murphy

Use Sort to reorder the list of Leads. Use Filter to narrow the list of Leads.

Personalize Columns Sort by Lead Type

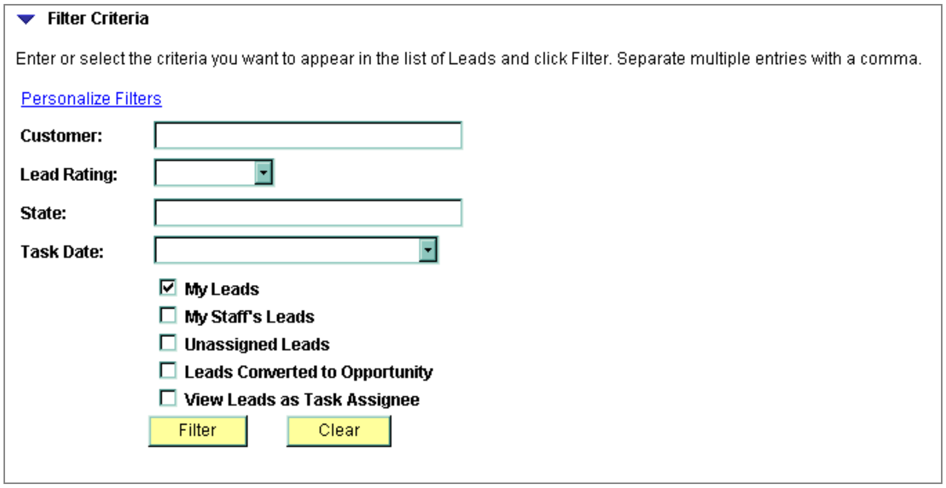
Filter: My Leads

Sales Leads Find | View All First 1-7 of 8 Last

Customer	Lead Name	Contact Name	Telephone	Lead Status	Lead Rating	Lead Type	Revenue	Sales User	Wave ID
Food Wholesaler	Needs to update current refrigeration equipment	Grech, Grant	800 2254687	Open	Hot		500,000.00	Murphy,Teresa	WVE0000106
B&L Distributors	info request	Small, Nathan	323 9334953	Open	Cold		500,000.00	Murphy,Teresa	WVE0000106
Madison Reese Inc.	Marketing dept needs vendor			New				Murphy,Teresa	
C&M Locker Co	freezer chests	Markus, Carol	208 8823396	Open	Cold		350,000.00	Murphy,Teresa	WVE0000106
Southern Wholesale Flowers	Continuing to grow and need several refrigerators	Carhart, Kathy	619 2976780	Open	Warm	Lead	400,000.00	Murphy,Teresa	WVE0000106
NW Dairy Products	more information	Clay, Jimmy	206 5247075	Open	Hot	Lead	400,000.00	Murphy,Teresa	
Metropolitan Steakhouses	Chain restaurant in need of many refrigerators	Smith, Stuart	206 9350640	Open	Hot	Lead	500,000.00	Murphy,Teresa	

Add New Lead Export To Excel

Sales Leads page (1 of 2)



Sales Leads page (2 of 2)

Using the Sales Leads Section

To select the columns of information displayed for each lead

1. Click the **Personalize Columns** link to access the Personalize Columns page.
2. Click the check box next to each column you want to display on the Sales Lead page.

To define sales lead sorting order

1. In the **Sort by** box, select the sales leads attribute that will dictate the sorting order: the key attribute.

   You can sort leads based on the values in any column you selected for the Sales Lead list. For example, if you select ***Lead Rating,*** the system will sort sales leads by whether they are Hot, Warm, and then Cold.

2. Select the direction to sort leads—in ascending order (low values first) by clicking on the icon or descending order (high values first) by clicking on the clicking on the icon.

To export lead information to an Excel spreadsheet

1. Click the **Export to Excel** button.

   A dialog box appears so that you can specify where to save the Excel file. The name of the file is *UserID*_LeadList.CSV, where *UserID* is your PeopleSoft User ID.

To display detailed information about a lead

1. Click the  icon next to the lead whose details you want to review.

   The Sales Lead Details page appears. For information about using this page, see Sales Lead Details Page.

To add a new lead

1. Click the **Add New Lead** button.

   The Sales Lead Details page appears. For information about using this page, see Sales Lead Details Page.

Using the Filter Criteria Section

The Filter Criteria section enables you to limit which leads display in the Sales Lead list. You can filter leads based on two types of criteria:

- Particular values for attributes in the columns of the Sales Leads list — for example, only display leads whose Lead Rating is Hot
- Categories of leads — for example, you can decide whether to include unassigned leads or just those assigned to you

The top portion of the Filter Criteria section displays fields corresponding to particular attributes of a lead, such as Customer, Lead Rating, or Task Date. You can filter leads in the Sales Leads list by entering values into these fields. You can also select which fields are available to use as filters.

At the bottom of the page, you can also limit your search results by selecting **My Leads**, **My Staff's Leads, Unassigned Leads, Leads Converted to Opportunity,** or **View Leads as Task Assignee**. These options are enabled on the Access Profiles page to become available on the Sales Leads page.

For more information on setting up access profiles, see Creating Access Profiles in "Defining Users and Territories."

To filter leads

1. Click the **Clear** button to remove any previous criteria in the attribute fields.

2. In one or more of the attribute fields, enter the specific values for the leads you want to include in the list.

   For example, if you only want to display leads whose Lead Rating is Hot, select *Hot* in the **Lead Rating** field. To display only hot leads associated with a particular customer, select *Hot* in the Lead Rating field and enter the customer name in the **Customer** field.

To enter multiple values for an attribute, separate the values with a comma.

3. Select which categories of leads to include by selecting the appropriate check boxes.

4. Click the **Filter** button.

   Only those leads that meet your criteria will appear in the Sales Leads list.

Note. To redisplay all leads, click the **Clear** button to remove all criteria, then click the **Filter** button.

To select the attributes available for filtering leads

1. Click the Personalize Filters link.

   The Personalize Filters page appears.

2. Click the check box next to each attribute you want to make available as a filtering option.

   For information about the attributes you can use as filters, see Sales Lead Details Page.

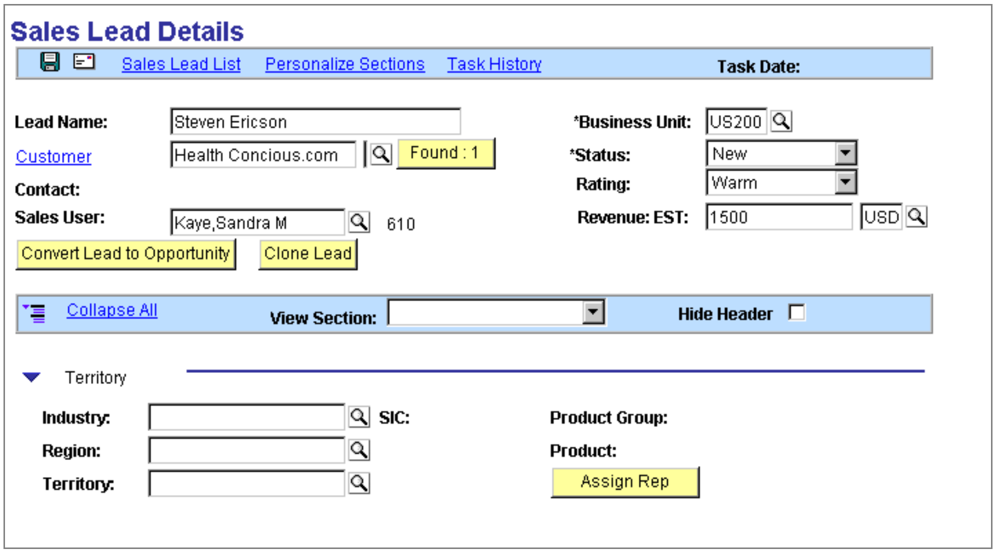
Creating Leads

You can create leads in three ways:

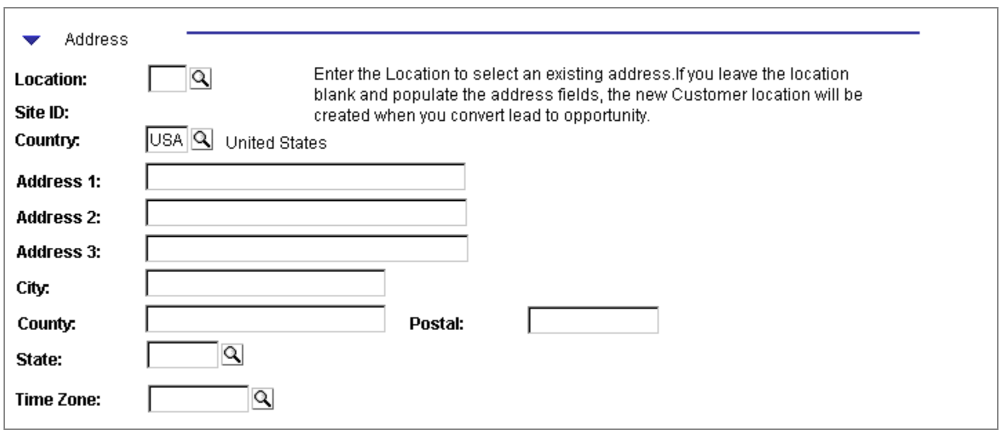
- Enter the lead information on the Sales Lead Detail page, which you can reach from the Sales Leads page or from the **Manage Sales** menu.
- Clone an existing lead.
- Import leads from an external file, most notably from PeopleSoft CRM Marketing.

Sales Lead Details Page

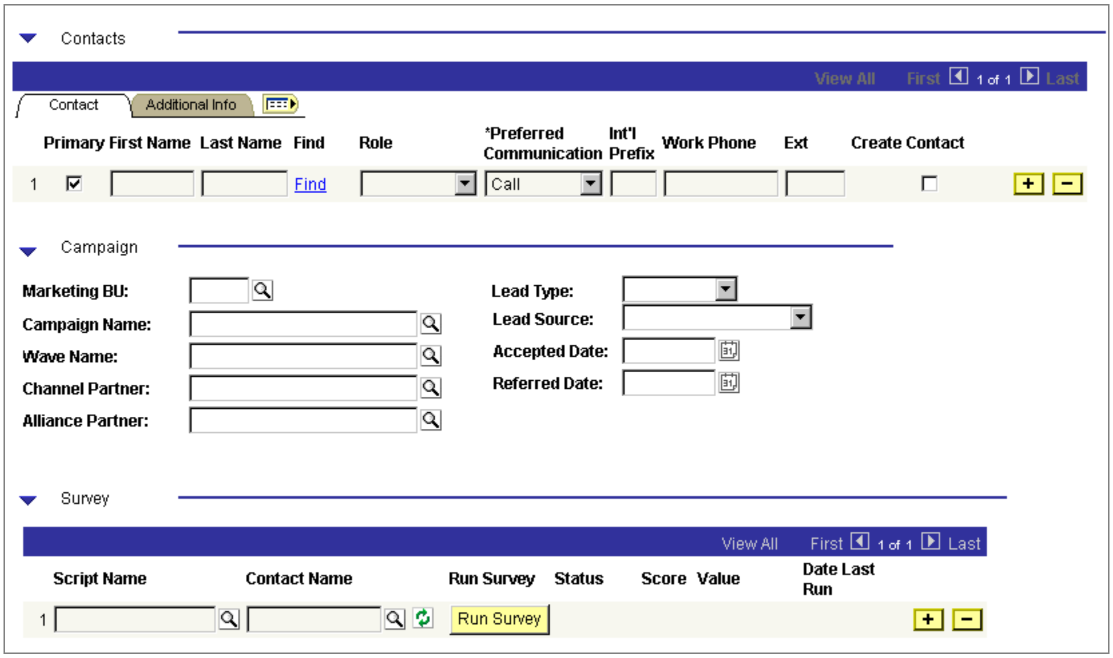
Usage	Use the Lead Entry page to capture data about sales leads that you will contact. Track products, fulfillments, contacts, or tasks.
Object Name	RSF_LEAD_ENTRY
Navigation	**Manage Sales, Manage Sales Leads, Use, Sales Lead Details**



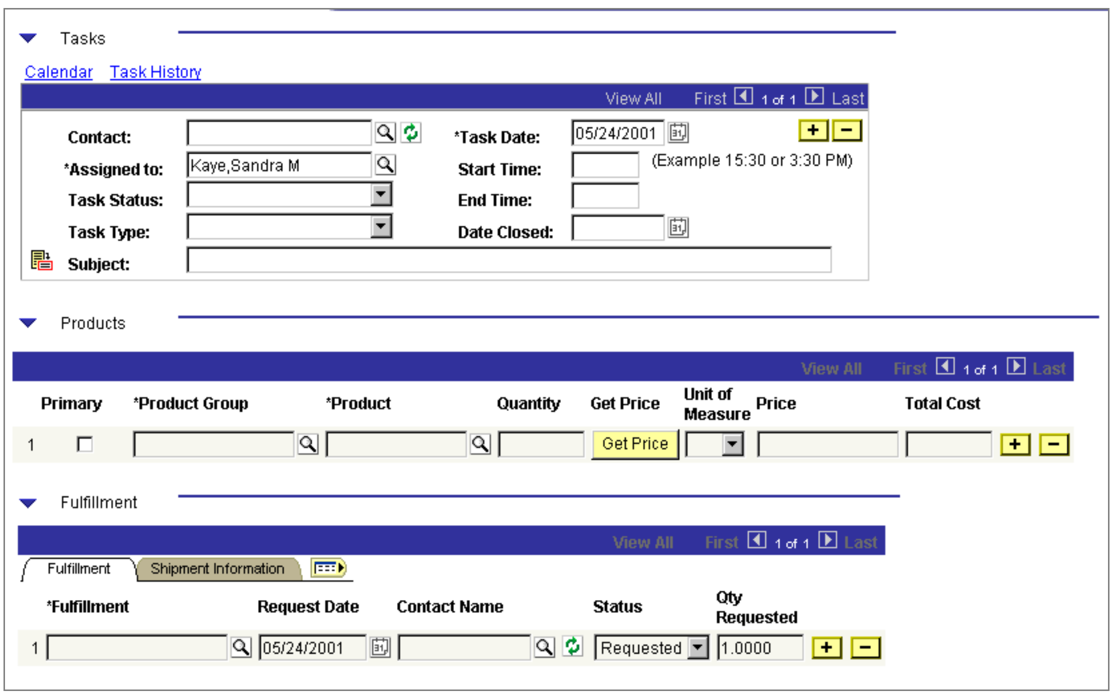
Sales Leads Details page (Header and Territory sections)



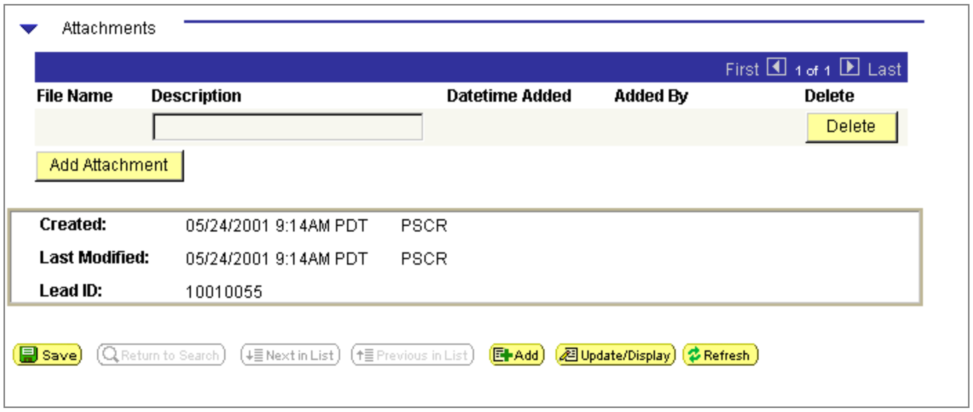
Sales Leads Details page (Address section)



Sales Lead Details page (Contacts, Campaign, and Survey sections)



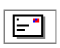
Sales Leads Details (Tasks, Products, and Fulfillment sections)



Sales Lead Details (Attachment section)

Action Bars

The bar across the top of the page provides shortcuts to key related pages for leads and to actions you may commonly want to perform:

- Click  to save the lead information.
- Click  to send an email message or worklist notification related to this lead.
- Click **Sales Lead List** to go to the Sales Leads page and view your existing leads. See Sales Leads Page.
- Click **Personalize Sections** to specify which sections appear on this page for capturing lead information.
- Click **Task History** to review the tasks that have been performed related to this lead.

The bar below the lead header information (under the **Convert Lead to Opportunity** button) enables you to specify what categories of lead information appear on this page. The Sales Lead Detail page is divided into sections, and you can specify which sections are expanded (displayed) and which are collapsed (hidden).

- The link on the left end says either **Expand All** or **Collapse All**, depending on whether the remaining sections on the page are currently hidden or displayed. Click the list to display or hide all the sections.
- The **View Section** box enables you to display an individual section. Select the section you want to see from the drop-down list.
- The **Hide Header** check box enables you to collapse the header section so that only the Lead Name, Customer Name, Contact, and Status display.

Header Section

In the top section of the page, enter the basic information about the lead.

Lead Name Provide a description for your lead.

Customer You can enter the name of the customer, or enter just part of the name and click the **Find** button to select from the list of existing customers.

If the selected customer has an associated contact, the contact name appears.

Sales User You can enter the name of the sales person for this lead, or enter just part of the name and click the hourglass button to select from the list of existing sales users.

Business Unit Select the business unit that the lead belongs to. **Business Unit** is a required field.

Rating Select whether the lead is ***Cold, Hot,*** or ***Warm.***

Status The available lead status values are:

- ***Accepted***
- ***Closed*** — When you select Closed, all fields for the sales lead are grayed out.
- ***Closed Duplicate*** — When you select Closed Duplicate, all fields for the sales lead are grayed out.
- ***Converted*** — The system assigns this status when you convert the lead to an opportunity. You cannot assign it yourself. All fields for a *Converted* sales lead are grayed out.
- ***Deferred***
- ***New***
- ***Open***
- ***Referred***
- ***Working***

Revenue: EST Estimated revenue. The field next to Revenue EST enables you to specify the currency code associated with the prospective revenue; the default value comes from your Sales User profile.

Convert Lead to Opportunity button	Click the **Convert Lead to Opportunity** button to change your working lead into an opportunity, where it will be visible for forecasting. For more information about converting a lead, see Convert Lead to Opportunity Page.
Clone Lead button	Click the **Clone Lead** button to go to the Clone Lead page where you can create a copy of your current lead. For more information, see Clone Lead Page.

Note. The **Clone Lead** button appears only after you save the lead.

Territory Section

You use the Territory section to assign the lead to the appropriate territory.

Region	Region
Industry	Name associated with the industry in which your lead operates. A default value will appear if the selected customer has an associated industry defined for it.
Territory	The territory that the lead will be assigned to.
Assign Rep button	Click the **Assign Rep** button to assign a sales representative. Depending on how your sales organization is divided into territories and on the user's access profile, you may have to assign values to the Customer, Region, Industry, or Product fields before the system will permit you to assign a sales representative.

For more information on setting up the Access Profiles page, see Creating Access Profiles in "Defining Users and Territories."

Address Section

You can specify the customer address for this lead either by selecting one of the predefined Location codes for that customer or by entering values into the address fields. If you select an existing **Location**, the system fills in the remaining fields; if you enter values in the address fields, the system will create a new customer location using these values when you convert the lead to an opportunity.

Contacts Section

You can add a contact either by entering information into the fields in the Contact row, or by clicking the **Find** link and selecting from a list of existing contacts. If you enter information about a new contact, select the **Create Contact** check box to add this person to the list of contacts, making him or her available in future searches. This person is also defined as a contact when you convert this lead to an opportunity.

You can enter multiple contacts for a lead. To add additional contacts, click the + button at the end of the **Contact** row. When you have more than one contact for a lead, you should identify one of them as the primary contact by clicking the **Primary** check box for that contact.

Campaign Section

If this lead originated from a marketing campaign, this section captures the information about the source of the lead.

For more information about importing links from PeopleSoft CRM Marketing, see PeopleSoft CRM Marketing PeopleBook.

Marketing BU Marketing business unit originating the lead.

Campaign Name Name of the marketing campaign

Wave Name Name of the wave of marketing activities, which generated the lead.

Channel Partner The channel partner who referred the lead.

Alliance Partner The alliance partner who referred the lead.

Lead Type The available lead types are:

Inquiry

Lead

Qualified

Trnbk Qual

Turnback

Lead Source Where the lead originated from. You select the source from the list on the Lead Sources page.

Accepted Date Enter the date that your organization determined that a potential lead is a worthwhile lead. Changing the lead status to **Accepted** defaults this lead with the current date.

Referred Date Enter the date that your organization received the prospect information, for example from a trade show. Changing the lead status to **Referred** defaults this lead with the current date.

Survey Section

The Survey section enables you to run survey scripts that can help you qualify leads. Scripts are standardized sets of questions that you can ask your customers. The scripts that you create in PeopleSoft CRM are *branch scripts*; that is, you can incorporate logic into the script so that the answer to a question determines what happens next.

You can conduct more than one survey for a lead. To run additional surveys, click the + button to add a new row.

Script Name	Select the branch script or survey to go through with your lead.
Contact Name	Enter the name of the contact who provides the answers to your survey. Click the Refresh button next to the **Contact Name** field to populate the contact list with the contacts for this lead (from the Contacts section).
Run Survey button	Click the **Run Survey** button to launch the survey selected in the **Script Name** field. The system will lead you through the survey questions, then assign a score or value to the prospect based on their survey answers.
Status	PeopleSoft CRM Sales will display either ***Completed, Processing,*** or ***Started*** based on where the user is in running the survey.
Score	This field gets filled in when you complete the survey, based on the customer's responses. The score is based on values established with the survey script was created.
Values	One of the following values based on survey score: ***Cold*** ***Hot*** ***Warm*** ***Satisfied*** ***Somewhat Satisfied*** ***Very Satisfied***

For more information of the creation and use of branch scripts, see Creating Branch Scripts in *PeopleSoft CRM Application Fundamentals PeopleBook.*

Tasks Section

Click the **Calendar** link to go to the Monthly Calendar page, which will display the tasks assigned to you.

For more information about the use of calendars, see Using Resource Calendars in *PeopleSoft CRM Application Fundamentals PeopleBook*.

Click the **Task History** link to go to the Task History page where you can see the chronology of completed or cancelled tasks associated with this lead.

Contact — Contact name for the task.

Click the Refresh button next to the **Contact** field to populate the contact list with the contacts for this lead (from the Contacts section).

Assigned to — Sales user to whom the task is assigned.

Task Status — Select whether the status of this task is ***Cancelled, Completed, In Process, Pending, Planned, Re-Scheduled,*** or ***Unassigned.***

Task Type — Select the Task Type from your list of user-defined options.

 — Click the  icon to go the Lead Task Detail page, on which you can enter detailed notes about this task.

Subject — A short description of the task.

Task Date — Scheduled date for the task, which will default to the current date. If you enter a future date, the task description will appear on your calendar for that date, and may also be visible to your manager, depending on how access profiles were set up.

Start Time — Time that a task is scheduled.

End Time — Time that a task is completed.

Date Closed — The date this task is closed. When you enter a date into this field, the system changes the **Task Status** to *Completed* when you save the lead, and moves the task to the task history.

If you don't enter a specific date, the system automatically enters the current date into this field when you complete or cancel a task (by changing the **Task Status** to *Completed* or *Cancelled*).

Products Section

The Products section enables you to record information about the products the customer is interested in. To add additional products, click the + button.

Primary	To identify a product as the customer's primary interest, select the **Primary** check box in the row for that product.
Product Group	The product group that the customer is interested in.
Product	The product that the customer is interested in.
Quantity	The number of units, measured in the units specified in the **Unit of Measure** field.
Get Price	Once you have entered a product and quantity, click the **Get Price** button to fill in the cost fields based on data retrieved from the product definitions.
Unit of Measure	The unit used for the specified product.
Price	The price of each unit. Clicking the **Get Price** button fills in this field with the price from the product definition, or you can enter a price. Entering a price here does not affect the price in the product definition.
Total Cost	The **Price** multiplied by the **Quantity**.

Fulfillment Section

If you order items for the customer associated with this lead, use the Fulfillment section to record the status of the order.

Fulfillment	The type of item sent, based on the list of fulfillment items defined under the Define Business Rules menu.
Request Date	Date that fulfillment was requested.
Contact Name	Name of the primary contact. Click the Refresh button next to the **Contact Name** field to populate the contact list with the contacts for this lead (from the Contacts section).
Status	Select the status of the fulfillment form the following options. ***Back Order*** ***Cancelled*** ***Partial*** ***Requested*** ***Shipped***
Qty Requested	Quantity requested
Qty Shipped	Quantity shipped
Last Shipment Date	Date on which the last fulfillment was shipped to a prospect.

Last Shipment Sent Via Enter the means used to ship the fulfillment from the Ship Via setup values..

Attachments Section

The Attachments section enables you to attach supporting files to this lead. For example, you might attach a spreadsheet containing a competitive analysis or a document describing the customer's requirements.

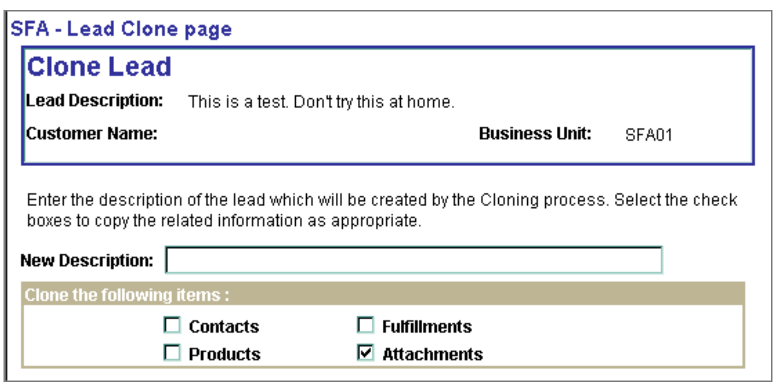
Note. You must save the lead before you can add an attachment.

To add an attachment, enter a description of the file, then click the **Add Attachment** button.

For more information about attachments, see Using PeopleSoft CRM Common Elements in *PeopleSoft CRM Application Fundamentals PeopleBook*.

Clone Lead Page

Usage	Use the Clone Lead page to create a copy of an existing lead.
Object Name	RSF_LE_CLONE_SEC
Navigation	Click the Clone Lead button
Prerequisites	Set up a lead.



Clone Lead page

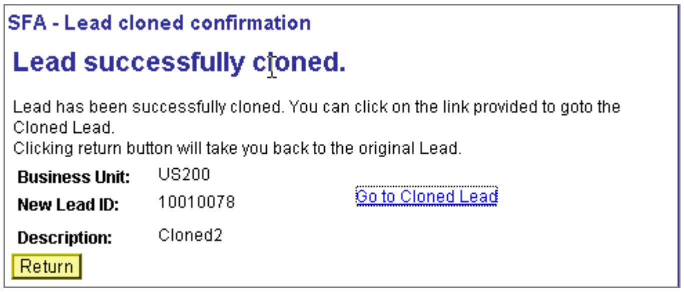
Cloning a lead is the equivalent of performing a Save As function in desktop programs.

New Description Enter a **New Description** for your cloned lead.

Items to clone You can select sections of a lead to clone. Select from the following: **Contacts, Products, Fulfillments,** or **Attachments.**

Lead Successfully Cloned Page

Usage	Use the Lead Successfully Cloned page to verify that a lead was successfully cloned.
Object Name	RSF_LE_CLON_OK_SEC
Navigation	Page will automatically display after cloning a lead.



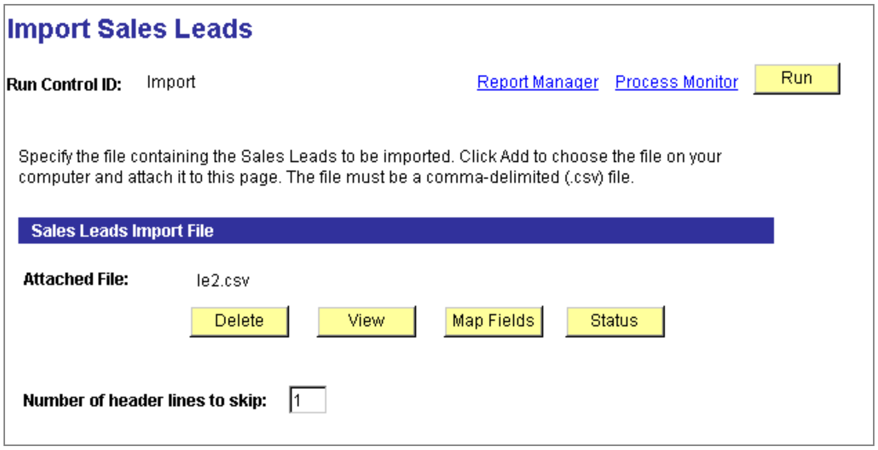
Lead Successfully Cloned page

Go to Cloned Lead link Click the Go to Cloned Lead link to go to the Sales Lead Detail page, which will be populated with the originating lead data under the **New Description** that you assign.

Return button Click the **Return** button to go back to the Sales Lead Detail page.

Import Sales Leads Page

Usage	Use the Import Sales Leads page to bring files containing leads into PeopleSoft Sales. Imported files must be in comma-delimited format.
Object Name	RSF_LEAD_IMPORT_AE
Navigation	**Manage Sales, Manage Sales Leads, Process, Import Sales Leads**
Access Requirements	Select a Run Control ID.



Import Sales Leads page

The Import Sales Leads page enables you to create multiple leads by importing the lead data from a comma-delimited spreadsheet file. A common source of lead import files is PeopleSoft CRM Marketing, which generates leads from marketing campaigns.

For more information about exporting leads from PeopleSoft Marketing, see PeopleSoft CRM Marketing PeopleBook.

To import sales leads

1. Click the **Add** button.
2. Click the **Browse** button on the search page.

   A standard file selection dialog box appears.
3. Navigate to the file containing the lead information, and select it.
4. Click the **Upload** button.

   The Import Sales Leads page reappears, with the name of the **Attached File** and with four new buttons: **Delete, View, Map Fields**, and **Status**.
5. Optionally, click the **View** button to review the contents of the file.
6. Enter the Number of header lines to skip.

   The first row in most import files does not contain data, but instead provides text labels specifying what data appears in each column. The number you enter in this field tells the system how many rows to skip over before the first row of lead information. The default is 1, meaning that the first lead is in the second row of the file.
7. Click the **Map Fields** button to specify how the data in the file maps to the fields in the PeopleSoft CRM Sales database.

The page that appears shows the contents of your import file on the left and the available system fields on the right. The **Field** column under **Import File Contents** shows the value from the first row in your file (which is usually a header row), and the **Sample data** column shows the value from the first data row.

Import Sales Leads

The contents of your import file are shown on the left. The expected format is shown on the right. This comparison will assist you in getting your import file to match the format that the system expects.

Your import file contains fewer fields than the required format.

Attached File: le2.csv **Header Lines:** 1

Import File Contents			Required Format				
Field Nbr	**Field**	**Sample data**	**Field Nbr**	**Field Name**	**Field Type**	**Length**	**Decimal Positions**
1	Lead ID (1)	NEXT	1	LEAD_ID	Char	15	
2	BU (2)		2	BUSINESS_UNIT	Char	5	
3			3	TERRITORY_ID	Char	15	
4			4	REGION_ID	Char	15	
5			5	DESCR50	Char	50	
6			6	CUST_SETID	Char	5	
7			7	PROD_SETID	Char	5	
8			8	FULFILL_SETID	Char	5	
9	Cust ID (9)	303	9	CUST_ID	Char	15	
10			10	NAME1	Char	40	
11			11	OPPORTUNITY_ID	Char	15	
12	Source (12)	MARKETING	12	LEAD_SOURCE_ID	Char	15	
13	RA BU (13)	RA200	13	BUSINESS_UNIT_RA	Char	5	
14	Campaign (14)	CMP0000101	14	RA_CAMPAIGN_ID	Char	15	

Mapping fields between the file and the database

In the **Field Nbr** column next to each field from the import file, enter the number of the database field you want to import its data into. When you have mapped all the fields from the import file, click the **Save** button and return to the Import Sales Leads page.

8. Click the **Run** button to import leads from the file.

The Process Scheduler Request page appears. Use it to send the import job to the Process Scheduler.

For more information about submitting requests to the Process Scheduler, see Using PeopleSoft 8 Applications.

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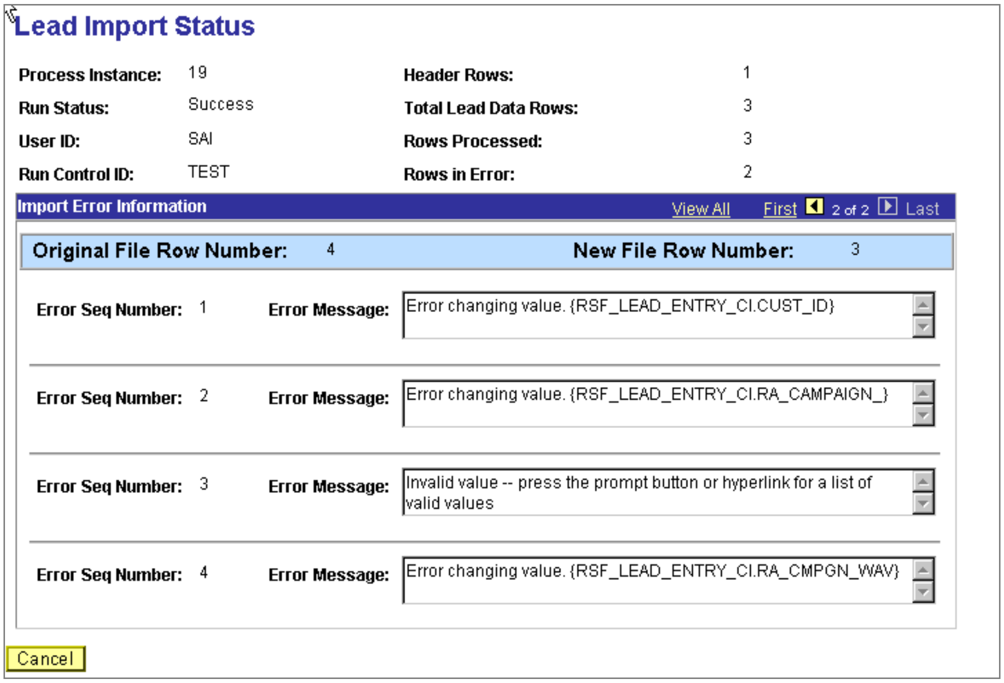
9. When the Process Monitor indicates that the process is complete, click the **Status** button that appears on the Import Sales Leads page.

The Lead Import Status page appears.



Lead Import Status page

Note. The Lead Import Status page indicates which leads were successfully imported. It differs from the status information available through the Process Monitor. The Process Monitor status indicates whether the import job ran without system errors.

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10. Review the status information.

    Total Lead Data Rows shows how many rows of lead data the system tried to import. The number should match the number of **Rows Processed**. If the system encountered any problems, **Rows in Error** specifies the number of leads that were not imported, and details about the errors appear in the lower portion of the page.

    When the system encounters an error, it does not import the problematic lead. It leaves the row in the spreadsheet file. Therefore, after the import, the file contains *only* the rows for the leads that were *not* successfully imported. In the **Import Error Information** section, the **Original File Row Number** shows which data row had the error, and the **New File Row Number** indicates that row's location in the new file (which includes only the rows that had errors in them),

    When you are done reviewing the status information, click the **Cancel** button to return to the Import Sales Leads page.

    If the **Rows in Error** is 0, the import was completely successful and you can skip the remaining steps.

11. Click the **View** button to display the contents of the spreadsheet file.

12. Correct the data problems.

13. Use **Save As** to save the spreadsheet to your local drive.

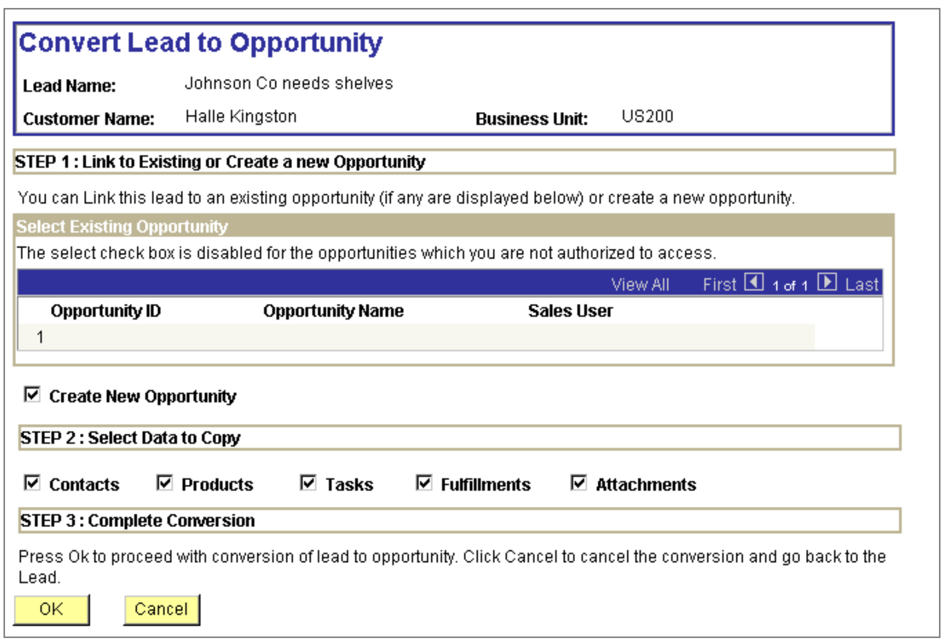
14. Close the spreadsheet and return to the Import Sales Leads page.

15. Click the **Delete** button to remove the currently attached file.

16. Repeat this procedure, selecting the revised spreadsheet from your local drive as the file to import.

Convert Lead to Opportunity Page

Usage	Use the Convert Lead to Opportunity page to move a lead into the category of opportunities.
Object Name	RSF_LE_OPP_SEC
Navigation	Click the **Convert Lead to Opportunity** button on the Sales Lead Details page.



Convert Lead to Opportunity page

To convert a lead into an opportunity

1. Select the existing opportunity to associate this lead with, or select the **Create New Opportunity** check box.

   When you convert a lead into an opportunity, you can chose to associate the lead with an existing opportunity or create a new opportunity.

2. Select which sections of the lead information to copy into the opportunity definition.

If you selected an existing opportunity, the lead information will be added to the existing information for that opportunity.

3. Click the **OK** button.

Managing Tasks

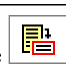
In addition to recording detailed information about each lead, you can associate tasks with them. These tasks are added to the calendar of the person you assign the task to.

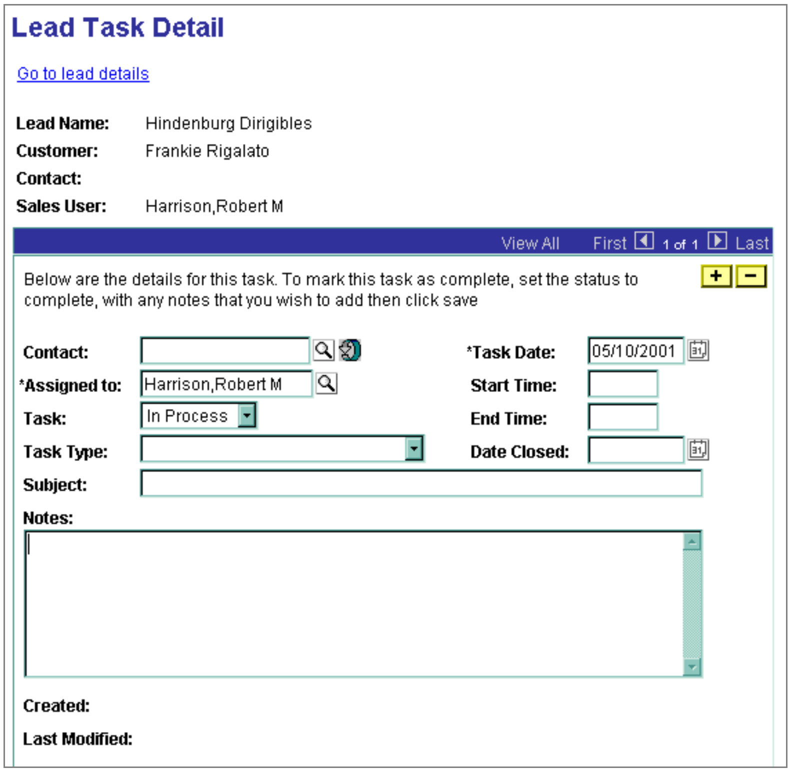
For more information about the calendar features, see Using Resource Calendars in *PeopleSoft CRM Application Fundamentals PeopleBook*.

You add a task using the Tasks section on the Sales Lead Detail page. From there, you can drill down to the Lead Task Detail page to enter notes about the task.

When you complete a task (or cancel it), the system removes the task from the active list of tasks and adds it to the task history for this lead. You can view that history by clicking the Task History link from the Sales Lead Details page.

Lead Task Detail Page

Usage	Use the Lead Task Detail page to enter notes about a task.
Object Name	RSF_LE_ACT_SCH_DTL
Navigation	Click the  detail icon from the Task section of the Sales Lead Detail page.

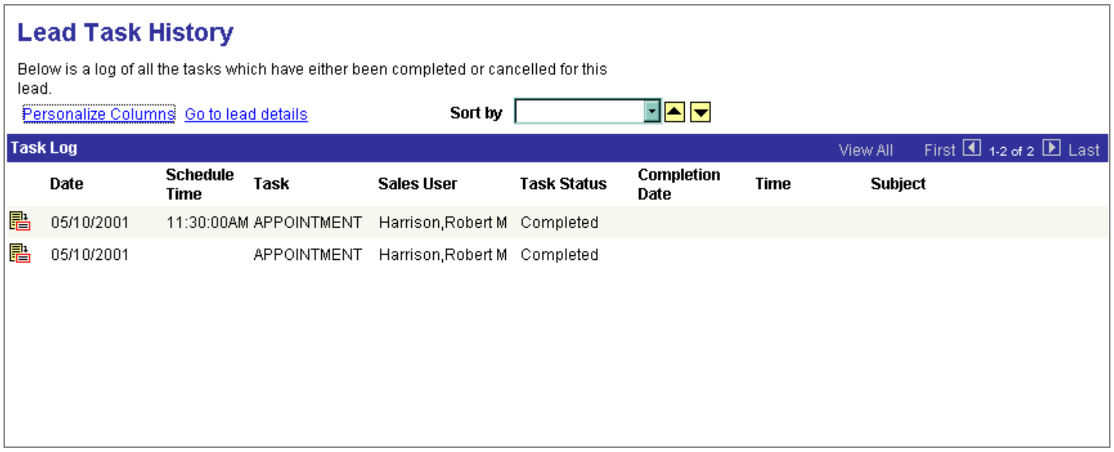


Lead Task Detail page

If you entered the basic task information on the Sales Lead Detail page, the values carry over into the corresponding fields on this page. See Sales Lead Details Page for details. In addition, this page includes a free-form **Notes** field, so that you can enter detailed information about the task.

Lead Task History Page

Usage	Use the Lead Task History page to review the history of tasks associated to a particular lead. The history of tasks are display only.
Object Name	RSF_LEAD_ACT_LOG
Navigation	Click the Task History link on the Sales Leads Detail page.



Lead Task History page

- Click the **Personalize Columns** link to go to the Lead Task History – Personalize Columns page.
- Click the **Go to lead details** link to return to the Lead Details page.
- Click to go to the Task History Detail page.

To define task sorting order

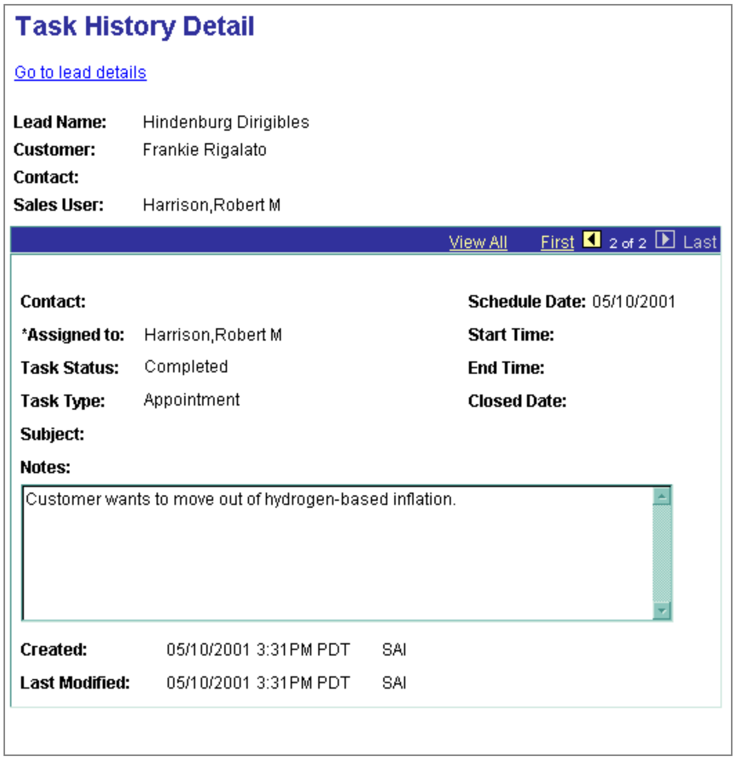
1. Select the attribute that will dictate the sorting order: the key attribute.

   You can sort tasks based on the values in any column you selected for the Task Log.

2. Select the direction to sort leads—in ascending order (low values first) by clicking on the icon or descending order (high values first) by clicking on the clicking on the icon.

Task History Detail Page

Usage	Use the task History Detail page to review details associated with a specific task.
Object Name	RSF_LE_ACT_LOG_DTL
Navigation	Click the icon on the Lead task History page.



Task History Detail page

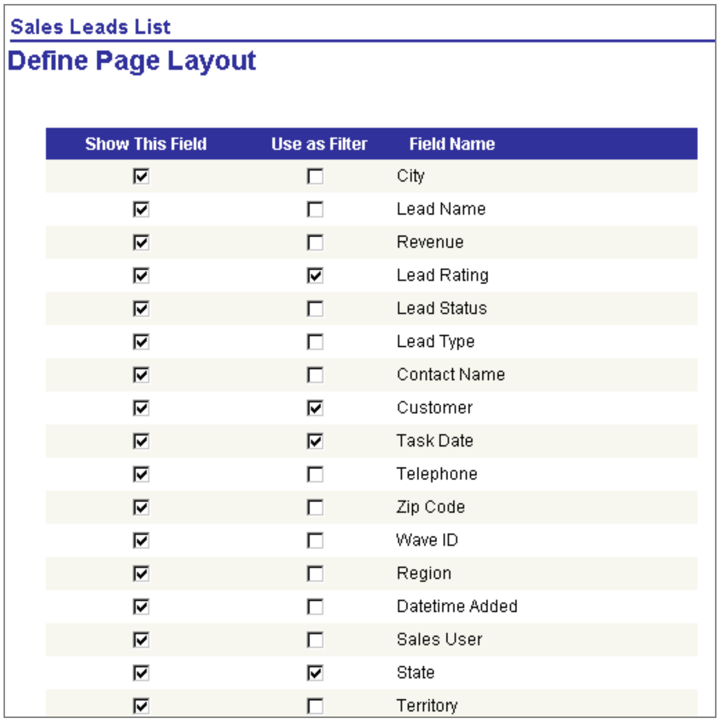
This page is a display-only version of the Lead Task Detail page (Lead Task Detail Page).

Personalizing Sales Information

You can personalize many of the pages in PeopleSoft CRM Sales, meaning you can specify which categories of information appear on the page. By personalizing pages, you can focus directly on the information that is most important to you.

Default Page Layout Page

Usage	Use the Define Page Layout page to define the default layout of the Sales Leads page. You select which columns to display and which attributes to enable as filters.
Object Name	RSF_PAGE_FIELDS
Navigation	**Define Business Rules, Sales Force Automation, Use, Default Page Fields**



Sales Leads List

Define Page Layout

Show This Field	Use as Filter	Field Name
☑	☐	City
☑	☐	Lead Name
☑	☐	Revenue
☑	☑	Lead Rating
☑	☐	Lead Status
☑	☐	Lead Type
☑	☐	Contact Name
☑	☑	Customer
☑	☑	Task Date
☑	☐	Telephone
☑	☐	Zip Code
☑	☐	Wave ID
☑	☐	Region
☑	☐	Datetime Added
☑	☐	Sales User
☑	☑	State
☑	☐	Territory

Define Page Layout page

To define the default layout of the Sales Leads page

1. Click the **Show This Field** check box next to each attribute whose values you want to display as columns in the sales lead list.

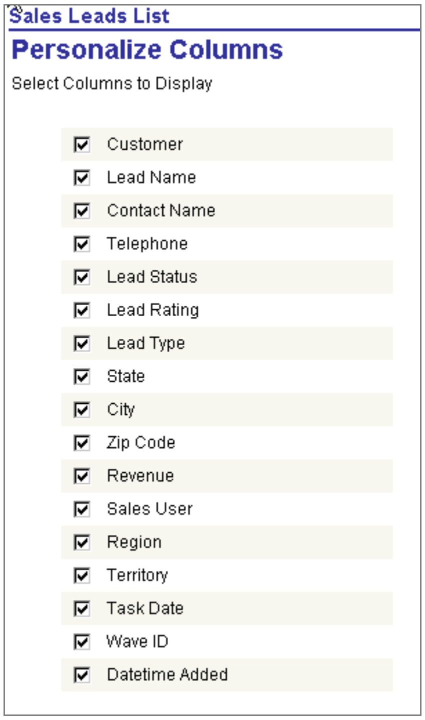
   For details about what the attributes are, see the Sales Lead Details page.

2. Click the **Use as Filter** check box next to each attribute on which you want to be able to filter leads.

   The corresponding fields appear in the Filter Criteria section on the Sales Leads page. Reducing the number of filters can improve performance by reducing the size of the HTML files for the page.

Personalize Columns Page

Usage	Use the Personalize Columns page to specify which columns display on summary pages, such as the Sales Leads page, the Opportunities page, or a Task History page.
Object Name	RSF_USER_FIELDS
Navigation	Click the **Personalize Columns** link on the main page.



Personalize Columns page

Note. The list of available columns differs depending on the page you are personalizing. The name of the page whose columns you are selecting appears at the top. The screen shot shows the columns available for the Sales Lead page.

To select the columns to display

1. Click the check box next to each attribute whose values you want to display.

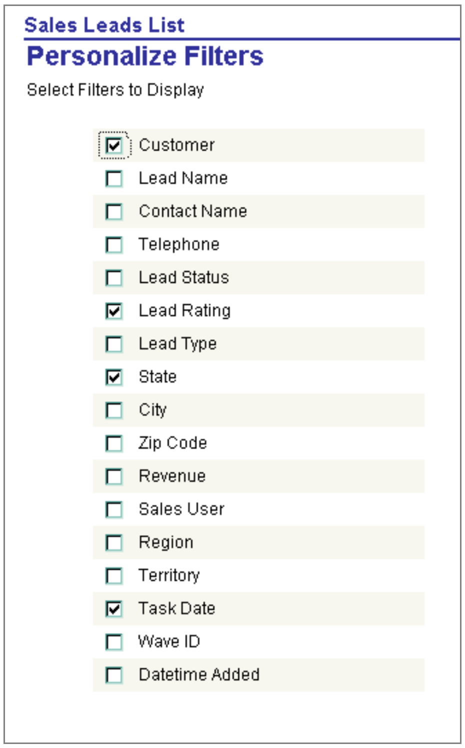
   For details about what the attributes are, refer to the documentation for the corresponding Details page. For example, see the Sales Lead Details page for information about the Sales Leads attributes, or the Opportunity Details page for informaiton about the Opportunities attributes.

2. Click the **OK** button to return to the main page.

   When you return to the main page, it displays a column for each attribute you select from this page.

Personalize Filters Page

Usage	Use the Personalize Filters page to specify which attributes are available to use as filters on summary pages, such as the Sales Leads page, the Opportunities page, or a Task History page.
Object Name	RSF_USER_FILTERS
Navigation	Click the **Personalize Filters** link on the main page



Personalize Filters page

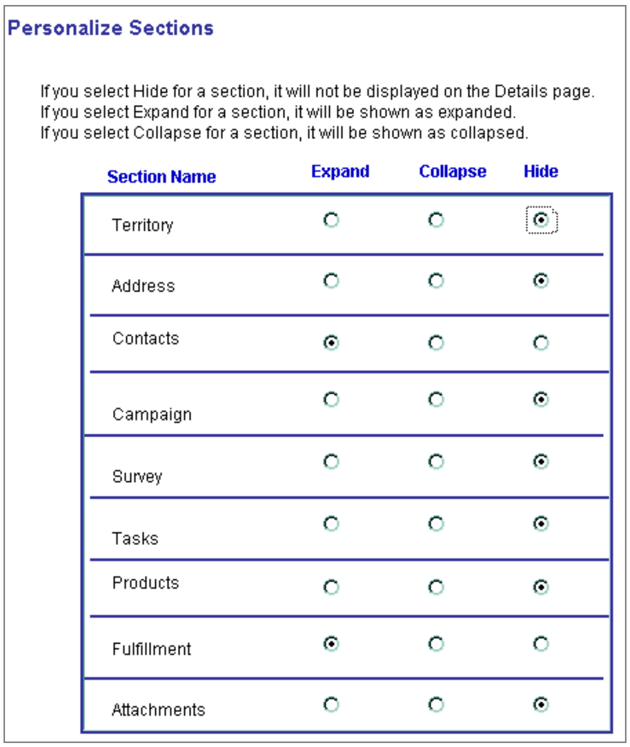
Note. The list of available filters differs depending on the page you are personalizing. The name of the page whose filters you are selecting appears at the top. The screen shot shows the filters available for the Sales Lead page.

When you select filters on the Personalize Filters page, corresponding fields appear in the Filter Criteria section on the page you are customizing. Reducing the number of filters can improve performance by reducing the size of the HTML files for the page.

For details about what the attributes are, refer to the documentation for the corresponding Details page. For example, see the Sales Lead Details page for information about the Sales Leads attributes, or the Opportunity Details page for information about the Opportunities attributes.

Personalize Sections Page

Usage	Use the Personalize Sections page to set the preferences for which sections will display when you go to the Sales Leads page in the future. Choosing to display the page in a collapsed form will create smaller HTML pages.
Object Name	RSF_LE_SECTIONS_SEC
Navigation	**Click the Personalize Sections link.**



Select Sections to Display page

Select the default setting for sections, whether you will **Expand, Collapse,** or **Hide** them.

Expand	Section displays as expanded.
Collapse	Section displays as collapsed.
Hide	Section will not display.

C H A P T E R 5

Managing Opportunities

The key to a successful sales cycle is efficient management of your opportunities as you shepherd them toward closing. PeopleSoft CRM Sales provides you with the tools you need to keep track of your opportunities and the tasks associated with them.

First, you start by bringing leads into the system. Through critical client contacts, you qualify leads and convert them to opportunities. These opportunities can have potential revenue figures and expected close dates assigned. Sales representatives and sales managers can roll opportunities up into forecasts.

You can configure Opportunity Management to address your selling environment. Some companies have fast transaction cycles where there is no distinction between a lead and opportunity. Some companies have longer sales cycles where capturing and tracking the information in the Opportunity becomes critical.

If sales is about anything, it’s about competition. You’re going to win some and lose some. Knowing why you won and why you lost, against whom, and what they brought to the party becomes critical. From this information you determine if and what tactics to adjust, what products or services provide greater ROI, or if you need to review your resource allocation. PeopleSoft CRM Sales enables you to capture competitive information: features support strategic decision making as well as streamlining execution.

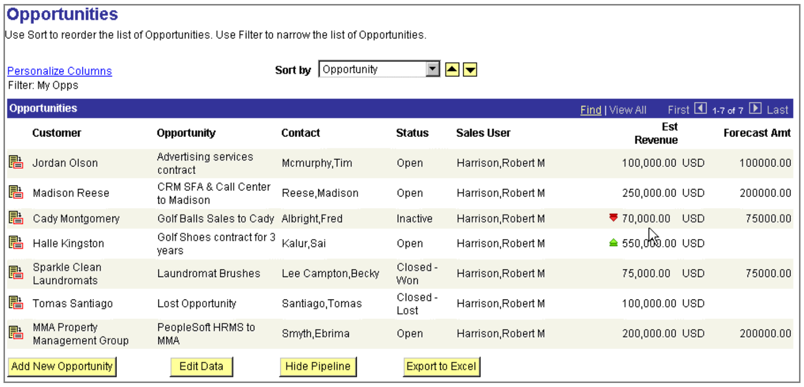
You can organize your opportunities by criteria that are relevant to you like most recent contact or ascending/descending revenue, and see it in clear grids. In addition, you can easily record key information from conversations so your next client contact can more easily build on previous ones.

Viewing Opportunities

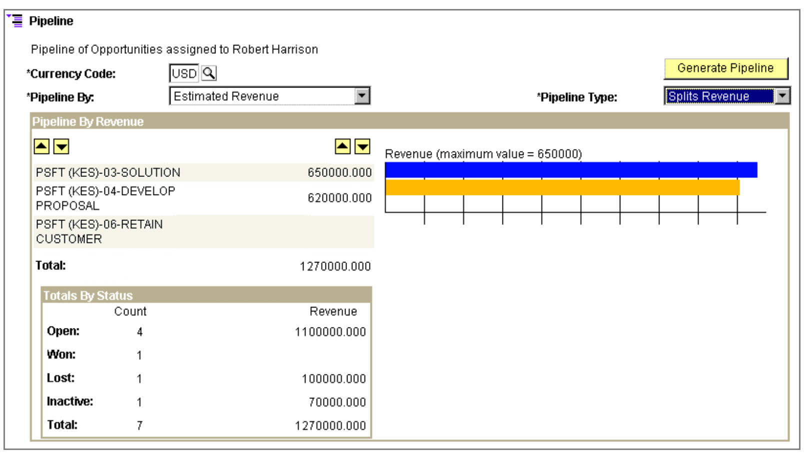
The Opportunities page is your "home page" for managing opportunities. It displays key information about your opportunities. You can customize the list to display just the information you want to see and just those opportunities you want to concentrate on.

Opportunities Page

Usage	Use the Opportunities page to access key information about your opportunities. You can sort and filter your opportunity information.
Object Name	RSF_OPP_HOMEPAGE
Navigation	**Manage Sales, Manage Sales Opportunities, Use, Opportunities**

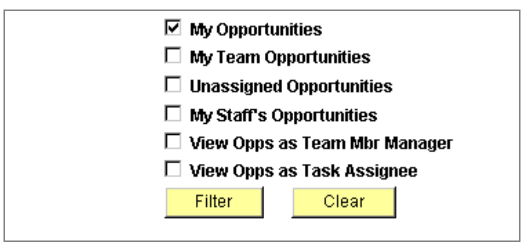


Opportunities page (list of opportunities)



Opportunities page (Pipeline section)

Opportunities page (Filter Criteria section)



Opportunities page (Filter Criteria section continued)

Using the Opportunities Section

To select the columns of information displayed for each opportunity

1. Click the **Personalize Columns** link to access the Personalize Columns page.

2. Click the check box next to each column you want to display on the Opportunities page.

   For information about the available columns, see Opportunity Detail Page.

To define opportunity sorting order

1. In the **Sort by** box, select the attribute that will dictate the sorting order: the key attribute.

You can sort opportunities based on the values in any column you selected for the Opportunities list. For example, if you select *Est Revenue***,** the system will sort opportunities by their estimated revenue.

2. Select the direction to sort—in ascending order (low values first) by clicking on the icon or descending order (high values first) by clicking on the clicking on the icon.

To export opportunity information to a Microsoft Excel spreadsheet

1. Click the **Export to Excel** button.

   A dialog box appears so that you can specify where to save the Excel file. The name of the file is *UserID*_OpportunityList.CSV, where *UserID* is your PeopleSoft User ID.

To display detailed information about an opportunity

1. Click the icon next to the opportunity whose details you want to review.

   The Opportunity Details page appears. For information about using this page, see Opportunity Detail Page.

To update opportunity information

1. Click the **Edit Data** button to bring the page into editing mode.
2. Make the desired changes in those fields that become editable.

To add a new opportunity

1. Click the **New Opportunity** button.

   The Opportunity Details page appears. For information about using this page, see Opportunity Detail Page.

Pipeline Section

If the Pipeline section does not appear on the page, click the **Show Pipeline** button to display it.

Note. The system requires a trip to the server to display the pipeline. Hiding regions that you only occasionally will use or not use while traveling will enable you to retrieve smaller HTML files from the server, so performance can improve. The system hides the Pipeline section by default.

The pipeline data shown includes only the opportunities selected by the filter criteria selected in the Filter Criteria section.

Currency Code Select the currency code on which to base the pipeline output.

Pipeline By Select either **Opportunity** or **Estimated Revenue** to display as a graph.

Generate Pipeline Click the **Generate Pipeline** button to see a graph of your pipeline.

Pipeline Type Select your **Pipeline Type,** whether ***Double Counts*** or ***Split Revenue. Double Counts*** determines the amount by multiplying the estimated revenue amount by the shadow percentage defined in your Sales User definition, then adding the shadow amount; ***Split Revenue*** determines the amount by multiplying the estimated revenue by your allocation percentage.

For more information about shadow percentages and shadow amounts, see Defining Sales Users in "Defining Users and Territories." Allocation percentages can be set only by sales managers whose access profiles enable them to reassign opportunities.

Using the Filter Criteria Section

The Filter Criteria section enables you to limit which opportunities display in the Opportunities list. You can filter opportunities based on two types of criteria:

- Particular values for attributes in the columns of the Opportunities list — for example, only display opportunities whose Status is Open
- Categories of opportunities — for example, you can decide whether to include unassigned opportunities or just those assigned to you

The top portion of the Filter Criteria section displays fields corresponding to particular attributes of an opportunity, such as Customer, Status, or Stage % Close. You can filter opportunities in the list by entering values into these fields. You can also select which fields are available to use as filters.

At the bottom of the page, you can also limit your search results by selecting **My Opportunities**, **My Team Opportunities, Unassigned Opportunities, My Staff's Opportunities, Views Opps as Team Mbr Manager,** or **View Opps as Task Assignee.** These options are enabled on the Access Profiles page.

For more information on setting up access profiles, Creating Access Profiles in "Defining Users and Territories."

To filter opportunities

1. Click the **Clear** button to remove any previous criteria in the attribute fields and display the opportunities based on default filter criteria (My opportunities).

2. In one or more of the attribute fields, enter the specific values for the opportunities you want to include in the list.

   For example, if you only want to display opportunities you are 50% or more confident about, enter *50* in the **Confidence %** field.

   To enter multiple values for an attribute, separate the values with a comma.

3. Select which categories of opportunities to include by selecting the appropriate check boxes.

4. Click the **Filter** button.

   Only those opportunities that meet your criteria will appear in the Opportunities list.

Note. To redisplay all opportunities, click the **Clear** button to remove all criteria, then click the **Filter** button.

To select the attributes available for filtering opportunities

1. Click the Personalize Filters link.

   The Personalize Filters page appears.

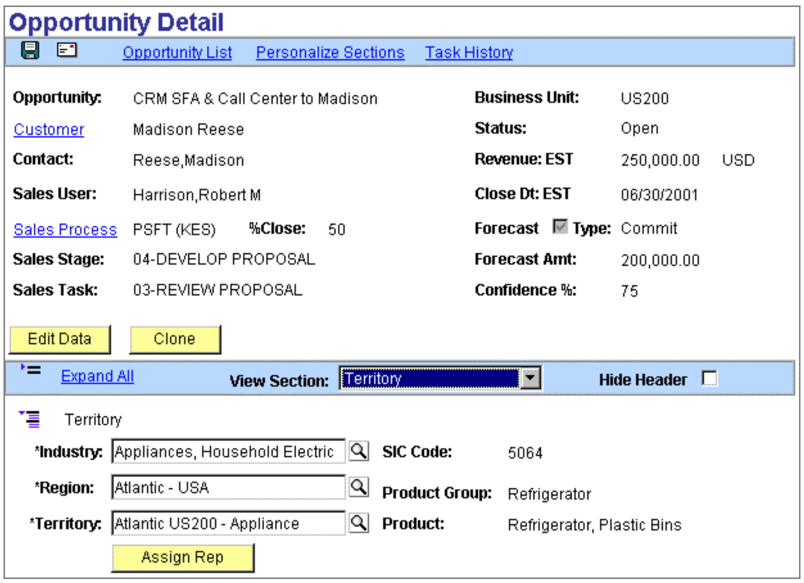
2. Click the check box next to each attribute you want to make available as a filtering option.

Reviewing Opportunities

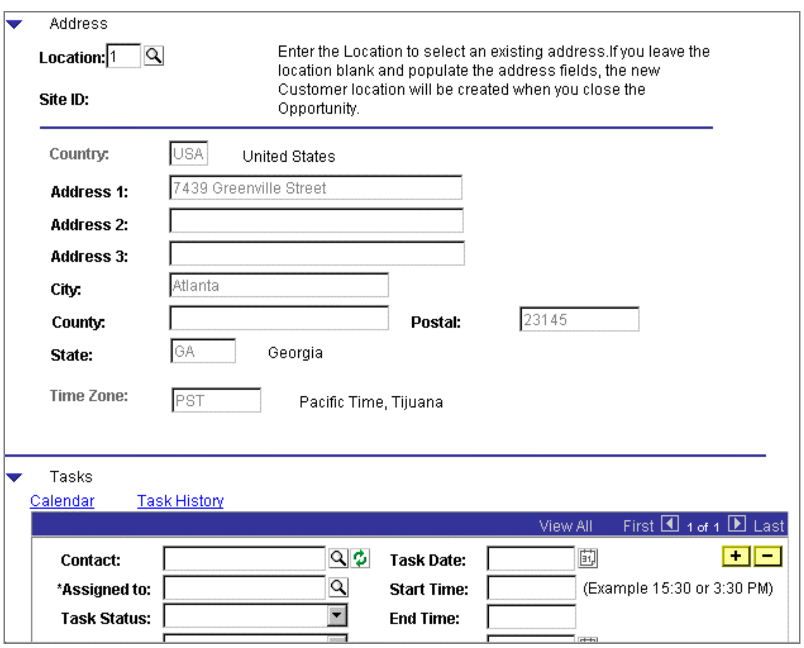
The Opportunities page displays key information about each of your opportunities, but it doesn't provide all the details. For a complete view of an opportunity, use the Opportunity Detail page, which you can reach from the menus or by clicking the detail icon from the Opportunities page.

Opportunity Detail Page

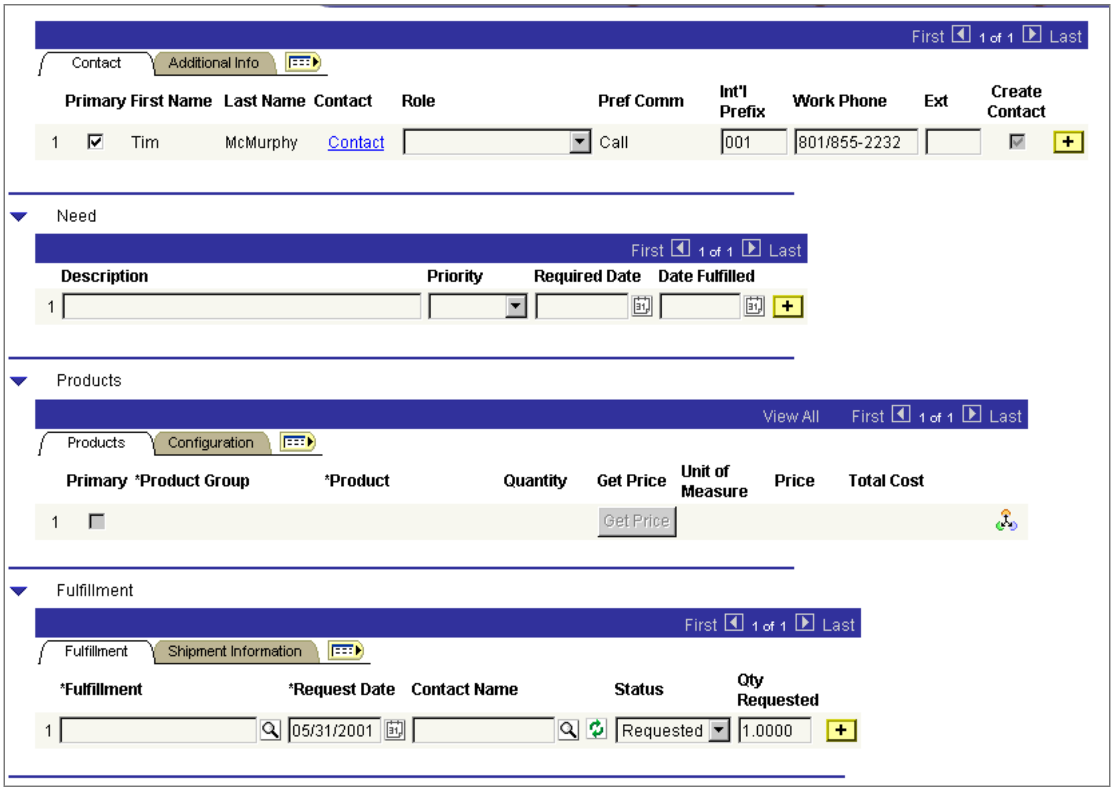
Usage	Use the Opportunity Detail page to capture details about an opportunity.
Object Name	RSF_OPP_DETAIL
Navigation	**Manage Sales, Manage Sales Opportunities, Use, Opportunity Detail**



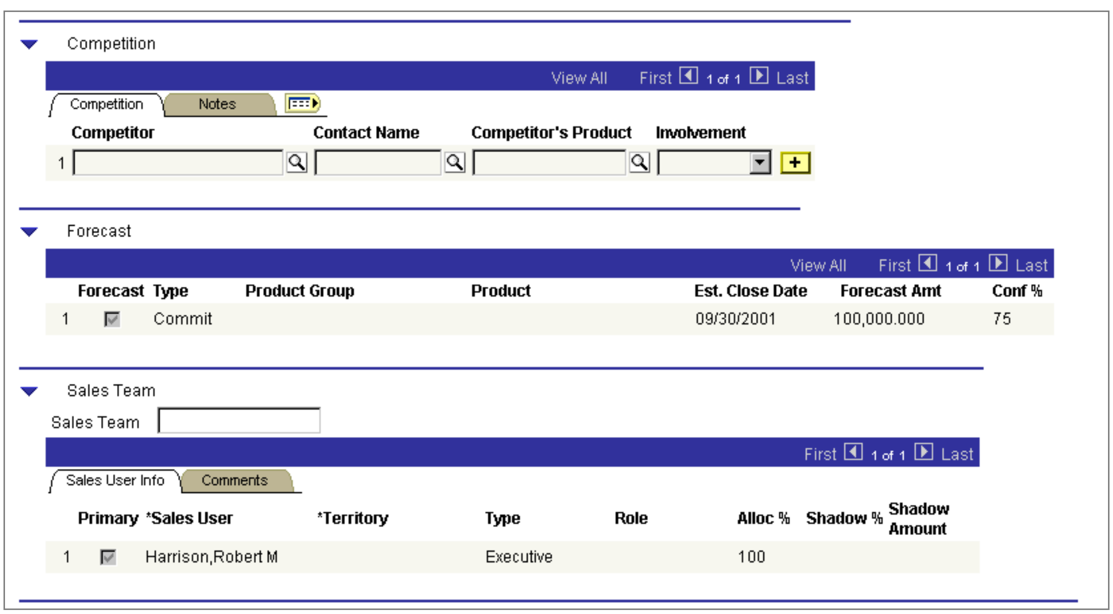
Opportunity Detail page (Header and Territory sections)



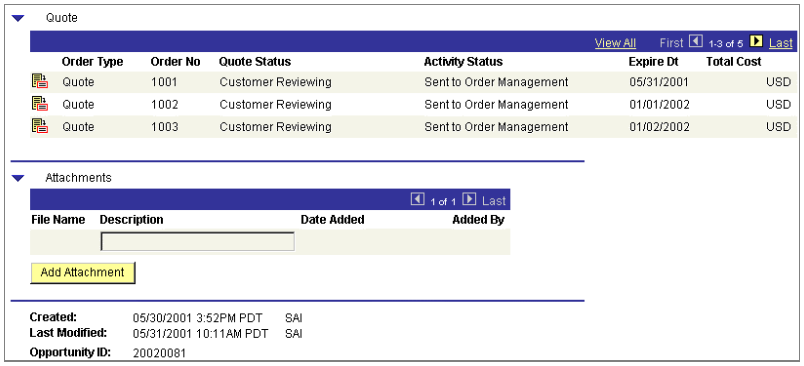
Opportunity Detail page (Address and Task sections)



Opportunity Detail page (Contacts, Need, Products, and Fulfillments sections)



Opportunity Detail (Competition, Forecast, and Sales Team sections)



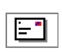
Opportunity Detail page (Quote and Attachments sections)

Note. Several sections on the Opportunity Detail page are identical to sections on the Sales Lead Detail page. If you convert a lead into an opportunity, the information in these sections carries forward.

For more information about the sections Territory, Address, Tasks, Contact, Fulfillments, and Attachments, see Sales Lead Details Page in "Managing Leads."

Action Bars

The bar across the top of the page provides shortcuts to key related pages for opportunities and to actions you may commonly want to perform:

- Click  to save the opportunity information.
- Click  to send an email message or worklist notification related to this opportunity.
- Click **Opportunity List** to go to the Opportunities page and view your existing opportunities. See Opportunities Page.
- Click **Personalize Sections** to specify which sections appear on this page for capturing opportunity information.
- Click **Task History** to review the tasks that have been performed related to this opportunity.
- The **Next Task Date** field displays the data assigned to the next uncompleted task related to this opportunity. If the task date has already past, a red square appears next to the date to warn you that a task is past due. A yellow triangle indicates the task is due today.

The bar below the header information enables you to specify what categories of opportunity information appear on this page. The Opportunity Detail page is divided into sections, and you can specify which sections are expanded (displayed) and which are collapsed (hidden).

- The link on the left end says either **Expand All** or **Collapse All**, depending on whether the remaining sections on the page are currently hidden or displayed. Click the list to display or hide all the sections.
- The **View Section** box enables you to display an individual section. Select the section you want to see from the drop-down list.
- The **Hide Header** check box enables you to collapse the header section so that only the Opportunity, Customer, Contact, and Status display.

Header Section

In the top section of the page, enter the basic information about this opportunity. If you reached this page from the Opportunities page, the data from that page appears here.

Opportunity

Provide a description for your opportunity.

Customer

You can enter the name of the customer, or enter just part of the name and click the **Find** button to select from the list of existing customers.

To add a contact, go to the Contacts section below.

Sales User

The sales person assigned to this opportunity. This field is read-only unless your access profile gives you the right to reassign opportunities.

Sales Process

The sales process used for this opportunity. Select the process from the drop-down list. When you do, the list of stages becomes available in the **Sales Stage** drop-down list.

For more information on the sales processes, see Defining the Sales Model in "Defining the Business Environment."

Sales Stage

The stage in the sales process that this opportunity has reached. The list of stages appears in the drop-down list after you select the **Sales Process**. In turn, selecting the **Sales Stage** populates the **Sales Task** drop-down list.

Sales Task

The current task in the selected **Sales Stage**.

% Close

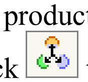
The system calculates the **% Close** value when you enter the **Sales Task** and save the opportunity. The calculation is based on the % Close Method defined as part of the selected **Sales Process**.

Business Unit	The business unit that the opportunity belongs to. **Business Unit** is a required field. You cannot change the value if the assigned sales user is not associated with the business unit.
Status	The available opportunity status values are: *Open*, *Inactive, Closed - Won*, and *Closed - Lost*.
Revenue: EST	Estimated revenue. The field next to Revenue EST enables you to specify the currency code associated with the prospective revenue.
Close Dt: EST	Estimated close date of the opportunity
Forecast	Select whether the opportunity will roll up into generated forecasts.
Forecast Type	Select the type of forecast that will incorporate this opportunity. Forecast type is another variable for assigning confidence levels and is user-defined.
Forecast Amount	Specify the amount to show up in the forecast for this opportunity.
Confidence %	Degree of confidence that a sales representative has in closing the opportunity. The degree of confidence is represented by a percentage figure.
Clone button	Click the **Clone** button to go to the Clone Opportunity page where you can create a copy of your current opportunity. For more information, see Opportunity Clone Page. **Note.** The **Clone** button appears only after you save the opportunity.
Show Leads link	Click the **Show Leads** link to display a list of the sales leads related to this opportunity. The link appears only if this opportunity has at least one lead associated with it.

Products Section

The Products section enables you to record information about the products the customer is interested in. To add additional products, click the + button. To identify a product as the customer's primary interest, select the **Primary** check box in the row for that product.

Once you have entered a product and quantity, click the **Get Price** button to fill in the cost fields based on data retrieved from the product definitions.

If the product is a configurable product, select the **Configuration** tab. The **Option Info** link shows the selected options; click  to make changes to the options.

Need Section

Need	Enter a text description of your prospect's business needs.
Priority	Select the **Priority** level, whether ***High, Medium, Low,*** or ***Urgent.***
Required Date	The date that need must be met.
Date Fulfilled	The date that the need was fulfilled.

Competition Section

Competition	Select the ID for your competitor. You select the competitor from the list of customers.
Competitor Rep	Competitor's sales representative
Product	Product offering code
Involvement	Indicate your competitor's involvement, whether ***Equal, Strong,*** or ***Weak.***

Forecast Section

This section is useful if you want to do multi-timeframe or multi-product forecast. Enter a row for each product or each timeframe that should be rolled up into the forecast.

Forecast	Select whether the opportunity will roll up into the forecast.
Type	Select the forecast type. Type values are user-defined.
Product Group	Product group code
Product	Product code
Forecast Dt	Forecast date
Forecast Amt	Forecast amount
Conf %	Degree of confidence as expressed as a percentage.

Sales Team Section

Enter team members that work on this opportunity manually or select a pre-defined team. Once the sales users are added to the opportunity from the team, any changes made to the opportunity Sales Team section will not be reflected in the Team definition.

Primary	Select whether a sales team member is the primary member.
Sales User	Sales user name
Territory	Territory listing

Type	Select the type of membership that someone has on the sales team, whether they are ***Admin, Executive, Field Rep, Inside Rep, Manager, Pre-Sales, Tech,*** or ***Telesales.***
Role	Role enables you to select user-defined values.
Alloc Pct	Allocation percentage
Shadow %	Shadow percentage **For more information** on shadow percentages and shadow forecasting, see Understanding Shadow Forecasts in "Forecasting."
Description	Enter a free form description

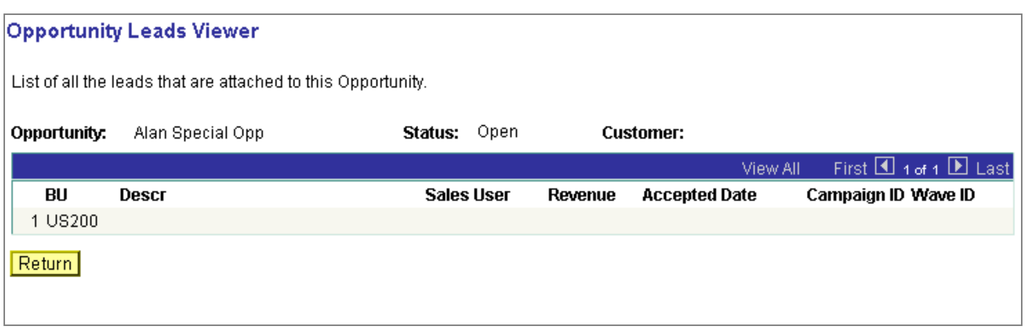
Quote Section

Once you have identified the products the customer is interested in (in the Products section), you can generate a quote to deliver to the customer. The Quotes section displays any previous quotes you have made, so that you can reuse an existing quote or create a new one.

	Click the  detail icon to go to the Generate Quote page, where you can review an existing quote.
Generate Quote button	Click the **Generate Quote** button to go to the Generate Quote page. **For more information** on the Generate Quote page, see Generating Quotes.

Opportunity Leads Viewer Page

Usage	Use the Opportunity Leads Viewer page to see the leads associated with a specific opportunity.
Object Name	RSF_OPP_LEAD_SECPG
Navigation	Click the **Show Leads** link from the Opportunity Details page.

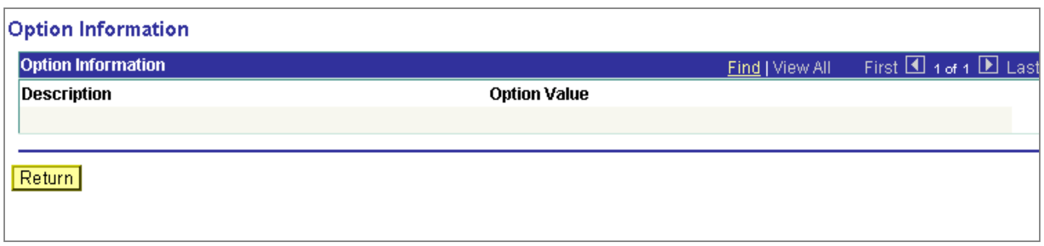


Opportunity Leads Viewer page

The Opportunity Leads viewer page is a display-only page listing the sales leads associated with the current opportunity. You associate a sales lead with an opportunity using the Convert Lead to Opportunity page.

Option Information Page

Usage	Use the Option Information page to view descriptions about product option values.
Object Name	RSF_OPT_DTL_SEC
Navigation	Click the **Option Info** link from the Products section on the Opportunity Details page.
Access Requirements	Set up option values for the selected product.

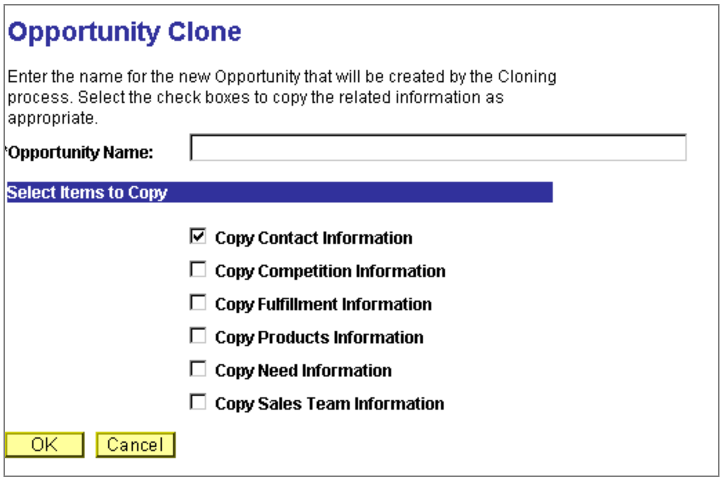


Option Information page

The Option Information page is a display page where you can see descriptions about selected configuration option values.

Opportunity Clone Page

Usage	Use the Opportunity Clone page to create a copy of an existing opportunity.
Object Name	RSF_OPP_CLONE_SEC
Navigation	Click the **Clone** button from the Opportunity Details page.



Opportunity Clone page

Cloning an opportunity is the equivalent of performing a Save As function in desktop programs.

Opportunity Name Enter a new name for the cloned opportunity.

Select Items to Copy Select which sections of the current opportunity to include in the new copy.

Managing Tasks

In addition to recording detailed information about each opportunity, you can associate tasks with them. These tasks are added to the calendar of the person you assign the task to.

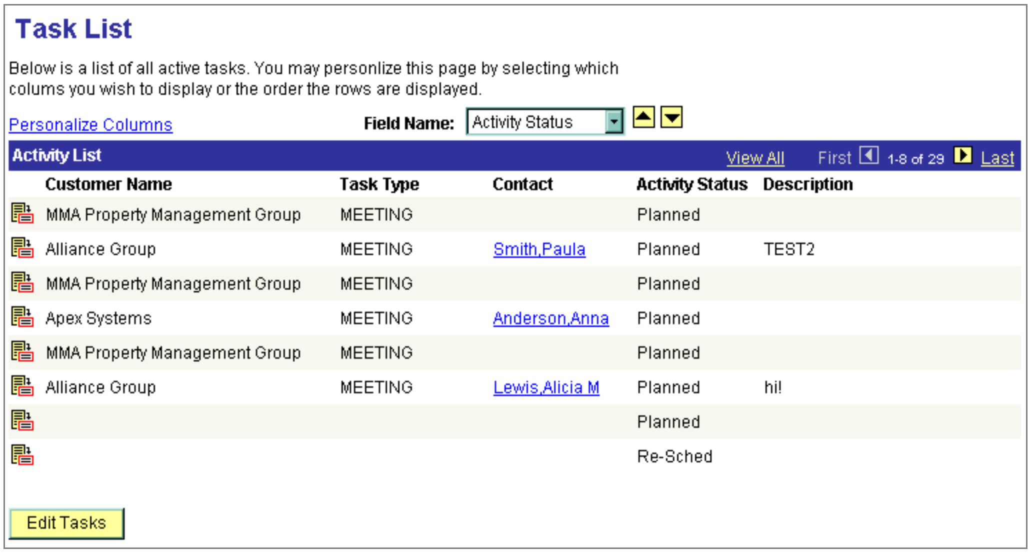
For more information about the calendar features, see Using Resource Calendars in *PeopleSoft CRM Application Fundamentals PeopleBook*.

You add a task using the Tasks section on the Opportunity Detail page. From there, you can drill down to the Task Detail page to enter notes about the task.

When you complete a task (or cancel it), the system removes the task from the active list of tasks and adds it to the task history for this opportunity. You can view that history by clicking the Task History link from the Opportunity Details page.

Task List Page

Usage	Use the Task List page to view the tasks associated with moving opportunities towards closing a sale.
Object Name	RSF_ACTIVITY_LIST
Navigation	**Manage Sales, Manage Opportunities, Use, Task List**



Task List

Below is a list of all active tasks. You may personlize this page by selecting which colums you wish to display or the order the rows are displayed.

Personalize Columns   **Field Name:** Activity Status

Activity List   View All   First 1-8 of 29 Last

Customer Name	Task Type	Contact	Activity Status	Description
MMA Property Management Group	MEETING		Planned	
Alliance Group	MEETING	Smith,Paula	Planned	TEST2
MMA Property Management Group	MEETING		Planned	
Apex Systems	MEETING	Anderson,Anna	Planned	
MMA Property Management Group	MEETING		Planned	
Alliance Group	MEETING	Lewis,Alicia M	Planned	hi!
			Planned	
			Re-Sched	

Edit Tasks

Task List page

To select the columns of information displayed for each task

1. Click the **Personalize Columns** link to access the Personalize Columns page.
2. Click the check box next to each column you want to display in the task list.

To define task sorting order

1. In the **Sort by** box, select the attribute that will dictate the sorting order: the key attribute.

   You can sort tasks based on the values in any column you selected for the task list.

2. Select the direction to sort —in ascending order (low values first) by clicking on the icon or descending order (high values first) by clicking on the clicking on the icon.

To display detailed information about a task

1. Click the icon next to the task whose details you want to review.

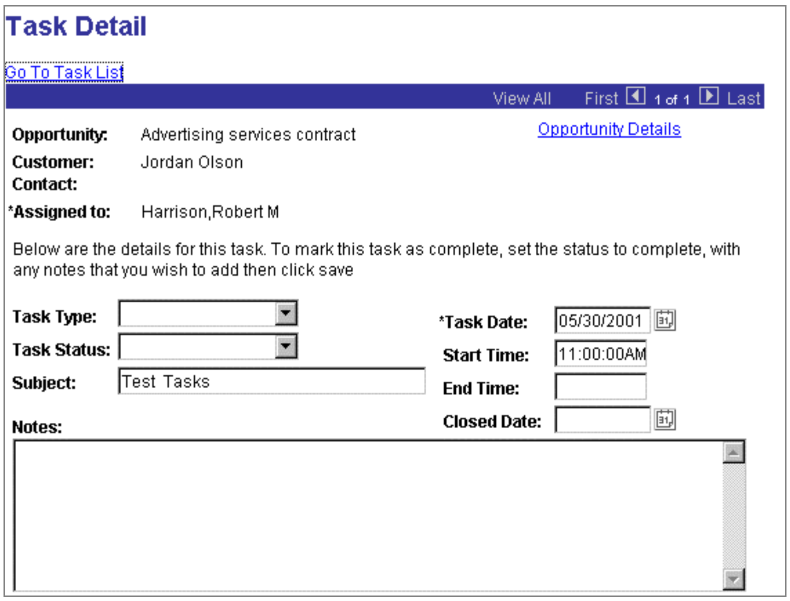
   The Task Detail page appears. For information about using this page, see Task Detail Page. .

To change task status

1. Click the **Edit Tasks** button to bring the page into editing mode.
2. Make the desired status changes.

Task Detail Page

Usage	Use the Task Detail page to enter notes about a task.
Object Name	RSF_OPP_TASK_DTL
Navigation	Click the detail icon from the Task section of the Opportunity Detail page.

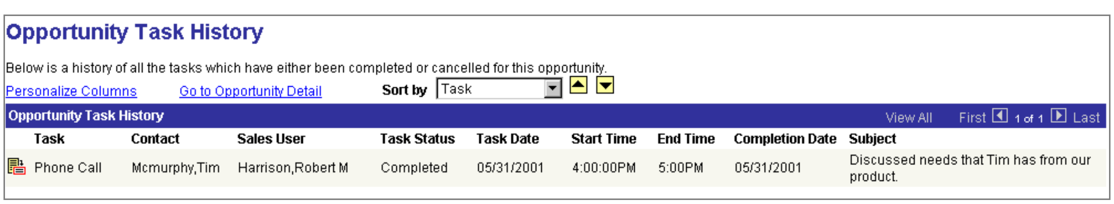


Task Detail page

If you entered the basic task information on the Opportunity Detail page, the values carry over into the corresponding fields on this page. In addition, this page includes a free-form **Notes** field, so that you can enter detailed information about the task.

Opportunity Task History Page

Usage	Use the Opportunity Task History page to review the tasks performed to advance an opportunity towards becoming a closed sale.
Object Name	RSF_OPP_ACT_LOG
Navigation	Click the **Task History** link from the Opportunity Details page.



Opportunity Task History page

- Click the **Personalize Columns** link to go to the Opportunity Task History – Personalize Columns page.
- Click the **Go to Opportunity Detail** link to return to the Opportunity Details page.
- Click to go to the Task History Detail page.

To define task sorting order

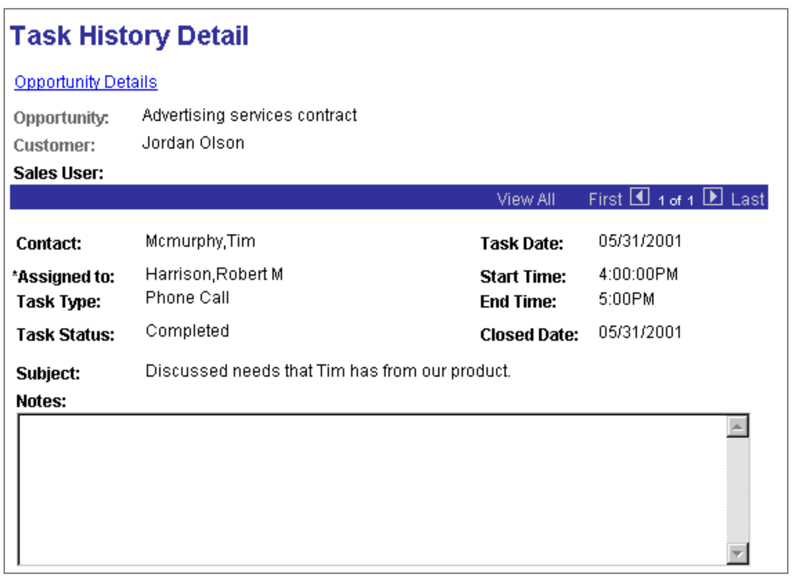
1. Select the attribute that will dictate the sorting order: the key attribute.

   You can sort tasks based on the values in any column you selected for the Task Log.

2. Select the direction to sort —in ascending order (low values first) by clicking on the icon or descending order (high values first) by clicking on the clicking on the icon.

Task History Detail Page

Usage	Use the task History Detail page to review details associated with a specific task.
Object Name	RSF_OPP_ACT_LOG_DTL
Navigation	Click the icon on the Opportunity Task Log page.



Task History Detail page

This page is a display-only version of the Task Detail page.

Generating Quotes

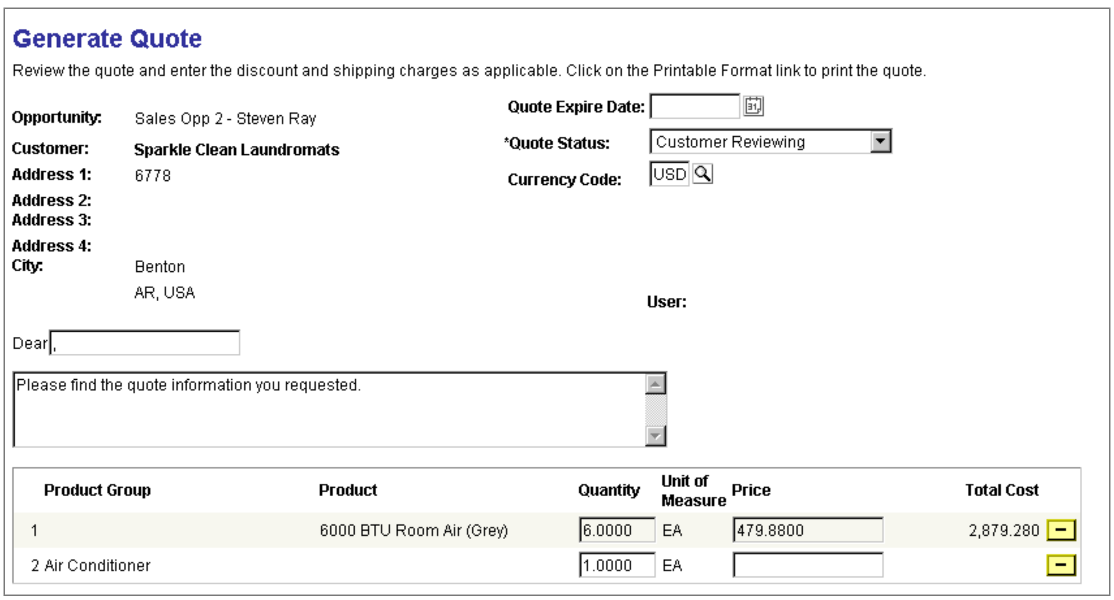
PeopleSoft CRM Sales enables you to generate price quotes for customers.

To generate a price quote

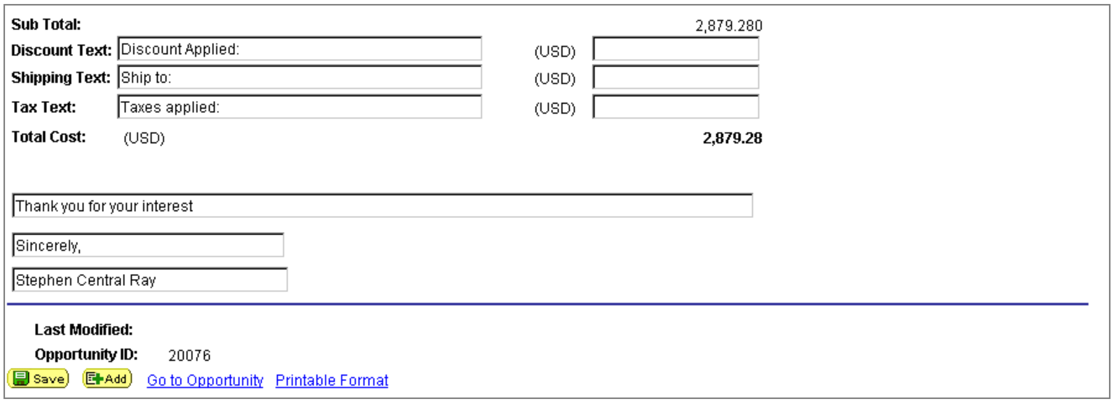
1. Create an opportunity for the customer.
2. Add the products that the customer is interested in to the Products section of the opportunity.
3. Click the Generate Quotes button from the Opportunity Details page.

Generate Quotes page

Usage	Use the Generate Quotes page to create a letter to your prospect with a price quote.
Object Name	RSF_OPP_QUOTE
Navigation	**Manage Sales, Manage Opportunities, Use, Generate Quotes**
Prerequisites	Complete Quote Setup Information page.



Generate Quote page (1 of 2)



Generate Quote page (2 of 2)

Enter the body of your message to your prospect.

Quantity	Quantity
Price	Price

The products that would be listed under the body of your message are those which you have already recorded during the life of your opportunity. As a result, you can delete products with the  button, but there is no add button.

Discount Text, Shipping Text, your salutation, and signing name are set up on the Quote Setup Information page.

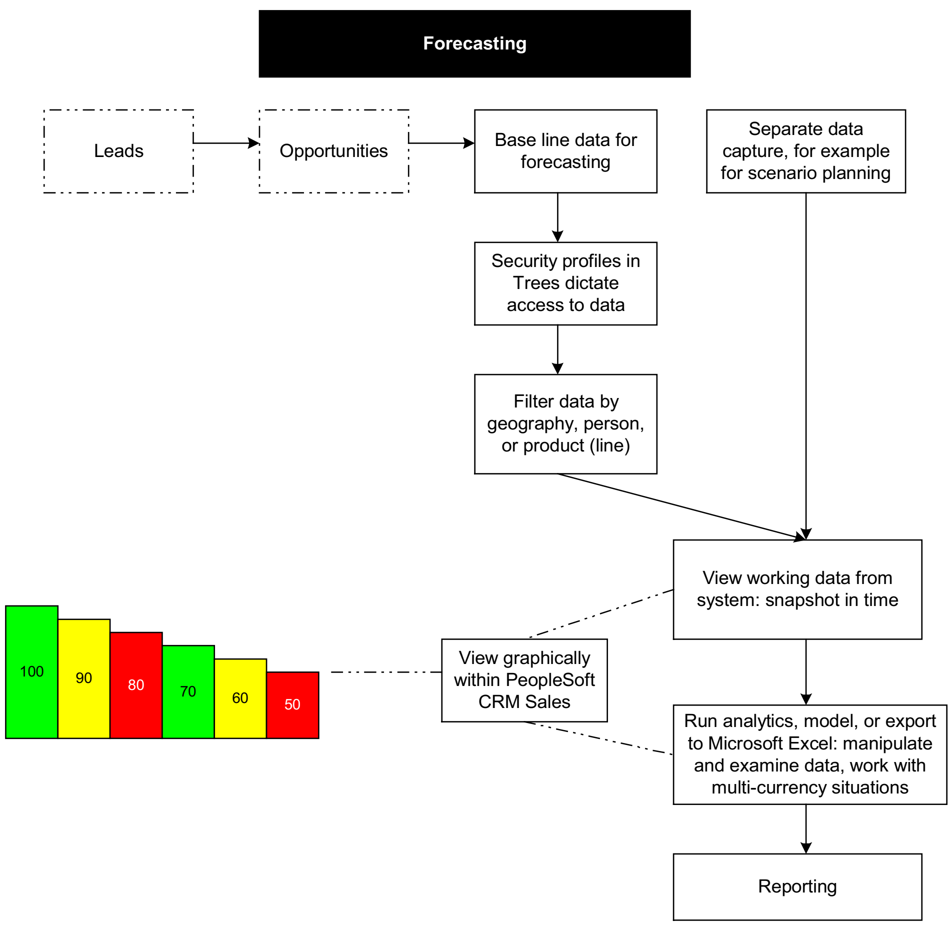
Click the **Printable Format** link to create a document to print and deliver to the customer.

CHAPTER 6

Forecasting

PeopleSoft CRM Sales enables users to view financial snapshots of where their department or enterprise is at any specific time.

First, your company enters leads into the system. For example, your company may purchase lead lists from market research companies and import the data into the system, obtain referrals from partners, or obtain thousands of business cards at a trade show. After contacting prospects, your sales representatives will pare down these leads so that they either become viable opportunities or get deactivated. The data that begins in the form of leads can be converted into the opportunities that your sales representatives work through the sales process.



Forecasting in PeopleSoft CRM Sales

Sales activities, their estimated revenues, and their assigned confidence percentages are the basis of forecasts. Sales representatives and managers can also capture data before regularly scheduled reporting periods; for example, to see the impact on their revenues if they close a certain deal.

In forecasting, sales representatives, managers, and financial staff work with specific sets of data, as allowed by their user profiles and security access. Managing information access is done using PeopleSoft Tree Manager so that managers in one division have access to their staff's data but not to the data of another division. You can filter the data to base your forecasts on; for example, you can focus on specific product group sales activity or revenues from a particular industry and then view the results graphically in PeopleSoft CRM Sales.

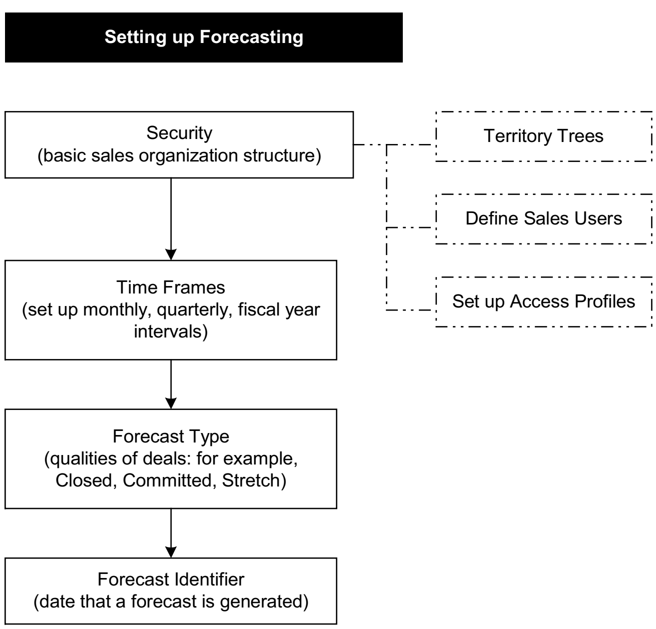
Once you have a set of data to evaluate, you can easily move that data to work with analytic applications for modeling or export the data to Microsoft Excel. Then you're on your way to a better understanding of your current and future situations.

PeopleSoft CRM Sales is delivered with a drag-and-drop analytic tool for manipulating your data. It is easy to add, delete, and reorganize criteria to get views of specific areas of your revenue and to analyze organizational effectiveness.

Setting Up Forecasting

Forecasting in PeopleSoft CRM Sales is where you get to look into the crystal ball and see if your sales department or sales organization is on track, how its representatives are delivering, and what the revenues are likely to be.

Using trees, you set up security and territories that determine who can see what information and that bring your organizational chain of command into your system. For example, this enables regional sales managers to roll up figures within their organizations and partition them off from the data of other regions.



Setting Up Forecasting

In **Defining Users and Territories** you set up the structure of your territories, created sales users, and assigned users to territories. These assignments will serve as the basis of forecasting. In this chapter you will set up the reporting time frames that are used in your company: weekly, monthly, quarterly, or fiscal year.

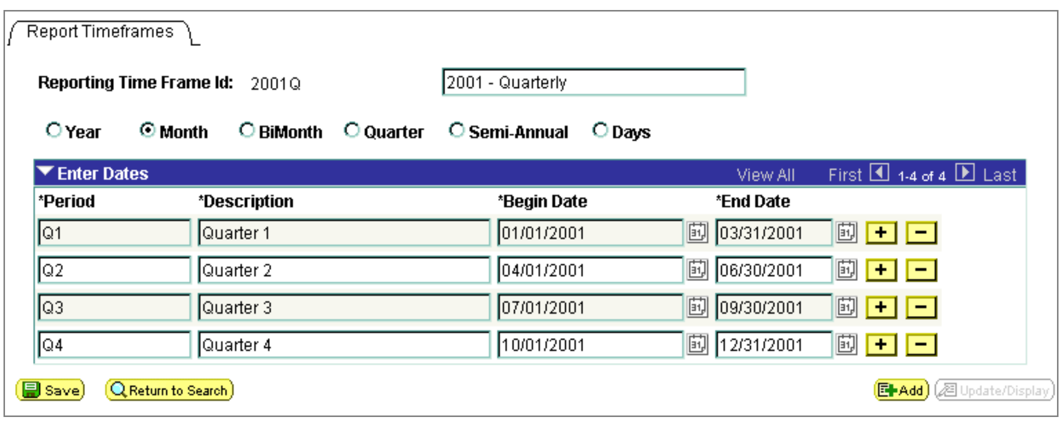
Forecasting in PeopleSoft CRM Sales can accommodate the deal attributes that you need to forecast.

These attributes vary from company to company and range from closed, strong probability, stretch or moderate probability, to low probability. Of course, you can also add your company's specific terminology for degrees of likelihood or confidence.

A forecast name represents your financial snapshot. The cross section of a forecast name and time frame is an instance of a forecast representing a snapshot of data at one point in time. For example, on March 15, 2001 you may want to create one forecast for the first quarter (Q1) and another for the second quarter (Q2). In this instance, March 15, 2001 is your forecast name and Q1 is your time frame.

Report Timeframes Page

Usage	Use the Report Timeframes page to set up or assign units of time; for example, to prepare for creating sales forecasts.
Object Name	RSF_TIMEFRAMES
Navigation	**Define Business Rules, Structure Sales Force, Use, Timeframe**



Report Timeframes page

Enter a description of your reporting timeframe. Select your time frame. Options are **Year, Month, BiMonth** (bimonthly), **Quarter, Semi-Annual,** and **Daily**.

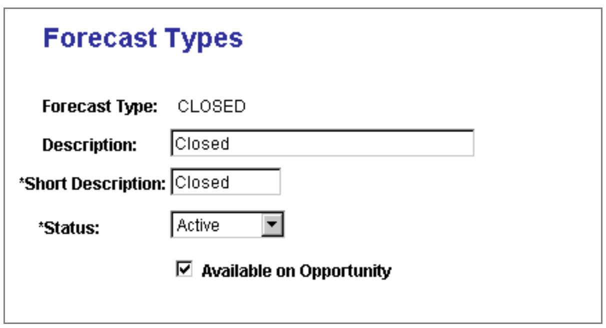
Enter Dates

Period	An abbreviated description of the time period.
Description	A more complete description of the time period; for example, ***Quarter 1*** or ***Fiscal Year 2002.***

Begin Date	Date that your time frame begins.
End Date	Date that your time frame ends.

Forecast Types Page

Usage	Use the Forecast Types page to enter user-defined classifications into the system. For example, your company may work with descriptions of degrees of likelihood that deals will close. **Note.** You can also use forecast types to record other items that impact your forecasts such as categories of revenue; for example, Closed - License Fees, Closed - Services.
Object Name	RSF_FCAST_TYPE
Navigation	**Define Business Rules, Structure Sales, Use, Forecast Types**

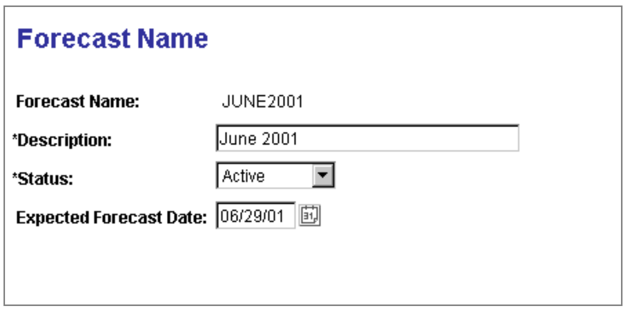


Forecast Types page

Forecast Type	The name of your forecast type. These names will typically indicate degrees of likelihood in closing deals; for example, *Committed* or *Stretch.*
Description	A longer description of the forecast type.
Short Description	Truncated description of the forecast type.
Status	Select whether the status of the forecast type is ***Active*** or ***Closed.***
Available on Opportunity	If this check box is selected, the forecast type will be a valid selection when entering forecast data on an opportunity. If it is not selected, the forecast type is available only on forecast pages.

Forecast Name Page

Usage	Use the Forecast Name page to define on which date that a forecast will be generated. **Note.** You use a combination of forecast name and time frame to capture a snapshot of data at one point in time.
Object Name	RSF_FCAST_DEFN
Navigation	**Define Business Rules, Structure Sales, Use, Forecast Name**



Forecast Name page

Forecast Name	Enter a truncated description for the forecast.
Description	Description of the forecast definition.
Status	Select whether the forecast definition type is ***Active*** or ***Inactive.***
Expected Forecast Date	Date on or after which a forecast can be created with this forecast name.

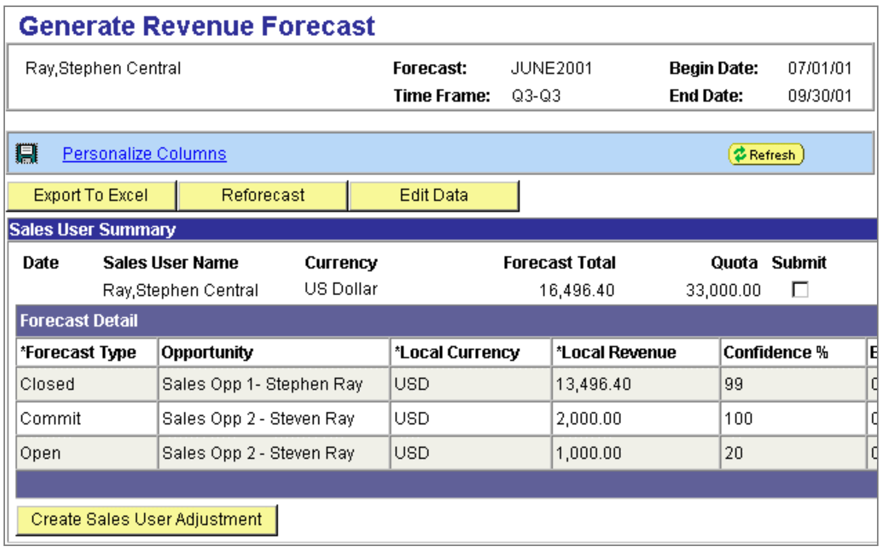
Conducting Revenue Forecasts

With PeopleSoft CRM Sales, you can generate forecasts based on the structure of your territory trees. You can generate revenue forecasts based on the detail that your sales representatives provide on their opportunities. You can also generate shadow forecasts to evaluate how sales team members are performing their sales support functions. Shadow forecasts are derived from selections that are made in the Sales Team section of Opportunity Details.

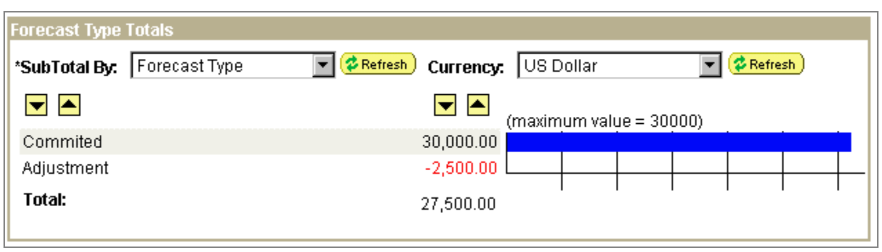
For more information about generating shadow forecasts, see **Understanding Shadow Forecasts**.

Generate Revenue Forecast Page

Usage	Use the Generate Revenue Forecast page to generate a sales forecast that is based on an individual sales representative's working opportunities. All of a sales representative's opportunities for the specified time period are displayed in the Forecast Detail region of the page. The sales representative can edit specific opportunities or enter an adjustment to the sum of his or her opportunities before submitting the data for forecast.
Object Name	RSF_FCAST_ENTER
Navigation	**Manage Sales, Manage Sales Forecast, Use, Generate Revenue Forecast**



Generate Revenue Forecast page (1 of 2)



Generate Revenue Forecast page (2 of 2)

Personalize Columns Click the **Personalize Columns** link to go to the Page Columns for a User page, where you can select which categories will be displayed as column headings.

Export to Excel Click the **Export to Excel** link to export your revenue forecast data to an Excel spreadsheet.

Edit Data

Click the **Edit Data** link to make direct changes to your forecast data, if your access profile grants you the edit capability. The information in the Forecast Detail region of the page becomes available for editing. You can erase and replace existing data.

Reforecast

Click the **Reforecast** link to regenerate your forecast, which you can do as long as your forecast has not been submitted. Reforecasting eliminates all modifications and adjustments to existing forecast and re-creates your forecast based on the current state of opportunity data.

Sales User Summary Section

Submit Forecast

Select this check box to include your opportunities in your individual forecasting and your manager's forecasting. Once submitted, the forecast cannot be changed.

Click the button to drill down to the specific opportunity on the Opportunity Detail page.

Forecast Detail Section

In the Forecast Detail section, you can see all the opportunities that you are working and make any necessary adjustments before submitting them for forecast. As a reminder, once you submit your opportunities for forecast, you cannot edit them further.

Forecast Type

The forecast type indicates where an opportunity is in the sales cycle

Sales User ID

Sales user ID

Sales User Name

Sales user name

Adjusted By ID

ID of the party who adjusted the forecast

Adjusted By Name

Name of the party who adjusted the forecast

Opportunity ID

Code for an opportunity.

Opportunity

Description of an opportunity.

Opportunity Status ID

Code that is associated with the status of an opportunity

Opportunity Status

Description of the status of an opportunity

Sales Model ID

Code that is associated with a sales model

Sales Model

Description of the sales model

Sales Stage ID

Code that is associated with a phase of the sales process

Sales Stage

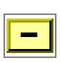
Description of the phase of the sales process

Stage % Close

How far along the opportunity is in the sales process

Local Currency

Currency that an opportunity is valued in.

Local Revenue	Amount or value of opportunities.
Exchange Rate	Exchange rate
View Revenue	
Confidence % (confidence percentage)	Degree of confidence that a deal will close, expressed as a percentage.
Est. Close Date	Estimated date that a deal will close.
Business Unit ID	Code that is associated with a business unit.
Business Unit	Business unit.
Product Group ID	Code that is associated with a product group.
Product Group	Grouping of products that are involved in your opportunity.
Product ID	Code that is associated with a specific product.
Product	Description of a product.
Customer ID	Code that is associated with a customer.
Customer	Customer.
Region ID	Code that is associated with a region.
Region	Description of a region.
Territory ID	Code that is associated with a territory.
Territory	Description of a territory.
Industry ID	Code that is associated with an industry.
Industry	Description of an industry.
Comments	Comments.
	Click the **Copy** button to copy a row so that you can edit the data in the new row to create a net adjustment; you cannot make changes to the source row.
	Click the **Delete** button to delete a row.
Create Sales User Adjustment button	Click the **Create Aggregate Adjustment** button to add a blank row so that a sales user can make an adjustment to the sum of his or her opportunities.

Forecast Type Totals

In this region, you can define the forecast sort order.

To define the forecast sort order:

1. Select a **SubTotal By** value to determine how to group your totals.

   For example, if you select *Forecast Type,* the system sorts opportunities by whether they are committed, open, closed, or have upside.

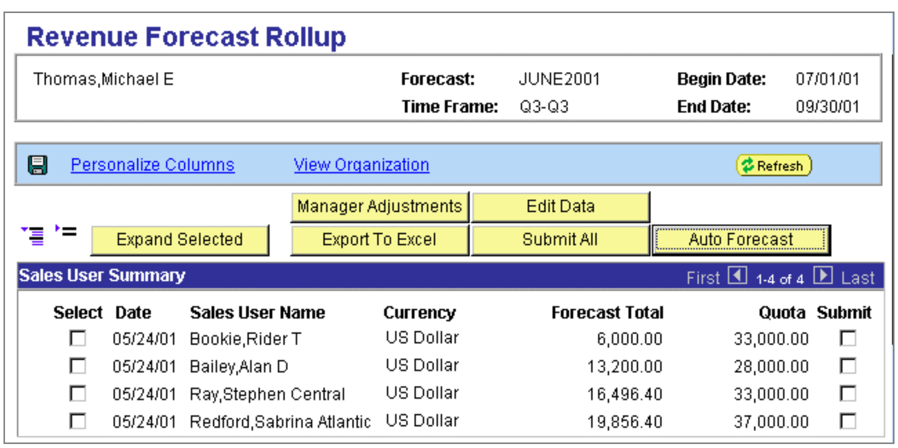
2. Select the **Currency** in which you want to view your totals.

3. Click any **Refresh** button to create your subtotals.

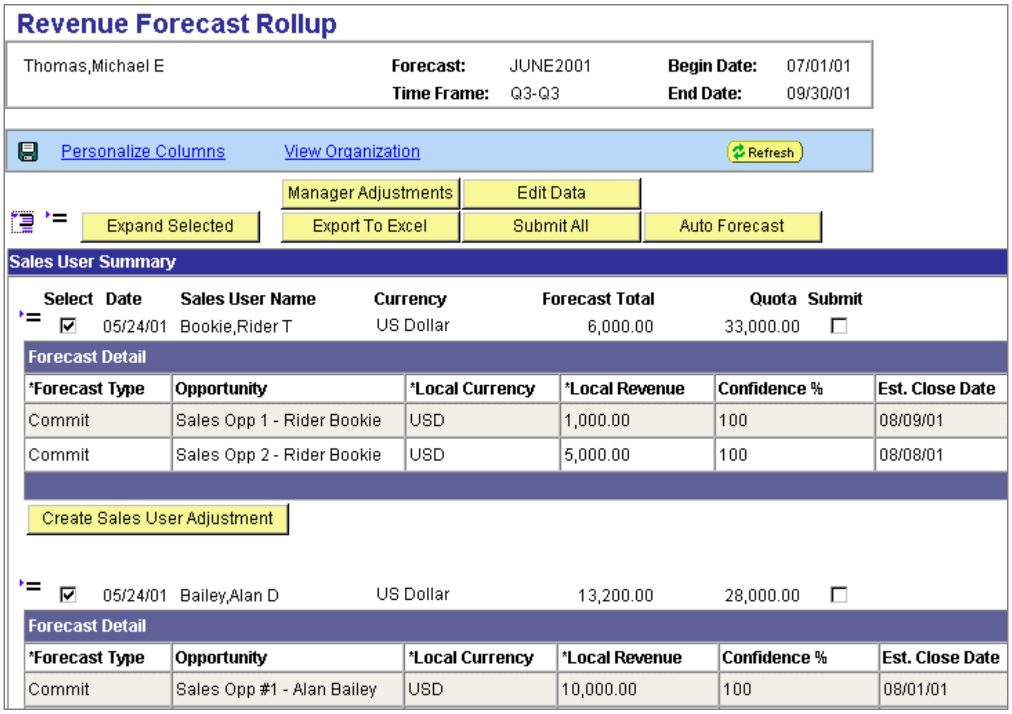
4. Use the sorting buttons to sort by subtotal values (for example, *Forecast Type*) or by subtotal amount.

Revenue Forecast Rollup Page

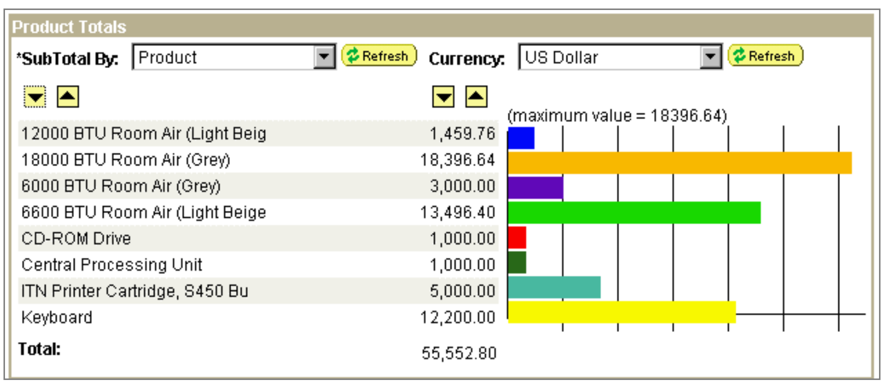
Usage	Use the Revenue Forecast Rollup page to examine the sales performance or progress of a reporting territory rollup, which could be a region, division, country, or business unit, depending on how your territories are defined. The information that one has available on the Revenue Forecast Rollup Page is determined by the organization of the company's territory tree. Managers can see only the forecasts of their staffs. Sales representatives cannot see the forecasts of their peers.
Object Name	RSF_FCAST_REVIEW
Navigation	**Manage Sales, Manage Sales Forecast, Use, Revenue Forecast Rollup**
Prerequisites	Set up a territory tree and a sales organization.



Revenue Forecast Rollup page (1 of 3)



Revenue Forecast Rollup page (2 of 3)



Revenue Forecast Rollup page (2 of 2)

Personalize Columns — Click the **Personalize Columns** link to go to the Page Columns for a User page, where you can select which categories appear as column headings.

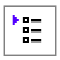
Export to Excel — Click the **Export to Excel** link to export your revenue forecast data to an Excel spreadsheet.

Edit Data

The **Edit Data** link is visible only when Edit All Forecast Data or Edit Own Forecast Data is selected on the Access Profile page.

Click the **Edit Data** link to make changes to your forecast data. The information in the **Forecast Detail** region of the page for a specific representative becomes available for editing; for example, to adjust a representative's forecasting figures upward or downward.

Expand All



Collapse All

Expand Selected

Click the **Expand Selected** button to drill down to the listing of individual sales representatives' portfolios of opportunities. Clicking this button displays a Forecast Detail region under the selected sales representative's name.

Auto Forecast

Click the **Auto Forecast** button to generate a forecast where the system creates a forecast for representatives who have not created their current forecast figures.

After you click the **Auto Forecast** button, the screen is refreshed and lists the previously absent sales representatives in the **Sales User Summary** region. Auto Forecast captures the sales representative opportunity data that they selected as available for forecast for the specified date range.

The **Auto Forecast** button is available only when one of the Auto Forecast selections is selected in your security profile on the Access Profiles page.

Manager Adjustments

The **Manager Adjustments** button is visible only when Adjust Forecasts is selected on the Access Profiles page.

Click the **Manager Adjustments** button to make changes to data in the Sales User Summary region of the page.

A new manager-owned row is created, and the manager appears in the **Sales User Name** column in the **Sales User Summary** region. The data entered in the new row creates a net adjustment, rather than changing the existing data.

Submit All

Click the **Submit All** button to select the **Forecast Submitted** check box for all sales users.

Sales User Summary Section

Select an individual sales user and click either the **Edit Data** link or the **Manager Adjustments** button to modify forecast data. The Forecast Detail region appears.

Forecast Submitted	As a manager, you can select the **Forecast Submitted** check box if one of your representatives has not yet submitted a forecast. Once you select this check box for a previously unsubmitted forecast, the representative cannot edit the forecast later. This prevents a situation where both the manager and representative adjust the same forecast after it has been submitted.

Forecast Detail Section

The column headings that appear in the Forecast Detail region are determined by the selections you made on the Page Columns to Display page. This region is where you make specific manager-level edits to the data that is provided to sales representatives; for example, to adjust a representative's revenue forecast downward or to increase the revenue forecast assigned by product group.

For more information about the column headings, see the documentation of the Forecast Detail region on the **Generate Revenue Forecast** page.

Forecast Type Totals Section

In this region, you define the subtotal sort order.

To define the subtotal sort order:

1. Select a **SubTotal By** value to determine how to group your totals.

   For example, if you select *Forecast Type,* the system sorts opportunities by whether they are committed, open, closed, or have upside.

2. Select the **Currency** in which you want to view your totals.

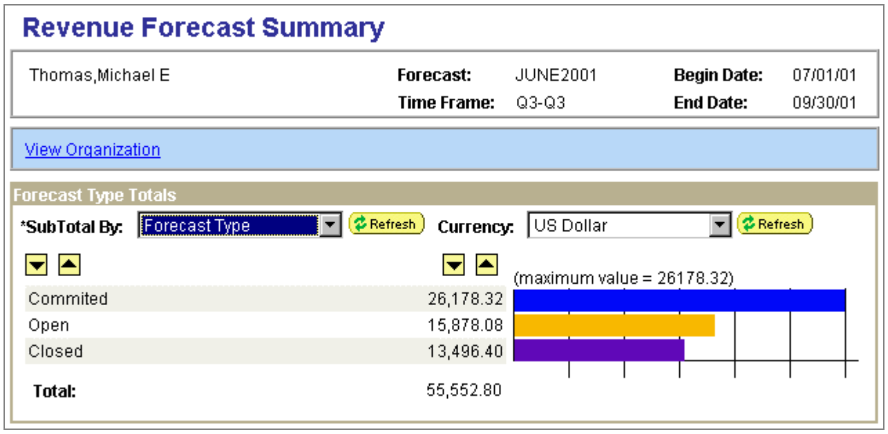
3. Click any **Refresh** button to create your subtotals.

4. Use the sorting buttons to sort by subtotal values (for example, *Forecast Type*) or by subtotal amount.

Revenue Forecast Summary Page

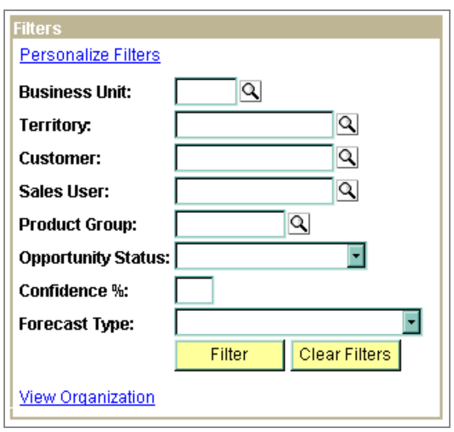
Usage	Use the Revenue Forecast Summary Page to work with an overview of your revenue forecasting figures. You can view forecasts, based on selecting different criteria, and then examine the results of combinations of criteria with a drag-and and-drop modeling tool that is accessible from the Revenue Forecast Summary page.
Object Name	RSF_FCAST_VIEW
Navigation	**Manage Sales, Manage Sales Forecast, Use, Revenue Forecast Summary**

Prerequisites	Set up a territory tree and a sales organization.
Access Requirements	Specify a time frame.



Revenue Forecast Summary page (1 of 3)

Revenue Forecast Summary page (2 of 3)



Revenue Forecast Summary page (3 of 3)

Sales Activity Insight Section

The two links in this section provide access to Sales Insight, the multidimensional analysis tool. Click either link to go to the Sales Activity Insight page. The **Quick View-Forecast Summary** link enables you to analyze the current forecast; the **Quick View-Forecast Comparison** link enables you to compare this forecast with another that you select in the **Compare With Forecast Name** field.

Forecast Type Totals

In this region, you define the forecast type sort order.

To define the forecast type sort order:

1. Select a **SubTotal By** value to determine how to group your totals

   For example, if you select *Forecast Type,* the system sorts opportunities by whether they are committed, open, closed, or have upside.

2. Select the **Currency** in which you want to view your totals.
3. Click any **Refresh** button to create your subtotals.
4. Use the sorting buttons to sort by subtotal values (for example, *Forecast Type*) or by subtotal amount.

Filters

Personalize Filters — Click the **Personalize Filters** link to go to that page. Personalizing filters is particularly useful if you know that you usually filter by certain criteria and not others. Selecting the filters that you want to appear on your screen on a regular basis increases the application's processing speed**.**

For more information about specific filter attributes, see the **Personalize Filters Page**.

Select Columns to Display Page

Usage	Use the Select Columns to Display page to set up your default filters for forecasting.
Object Name	RSF_FCAST_FILT_SEC
Navigation	Click the Personalize Filters link on the Revenue Forecast Summary page.

Select Columns to Display page

Business Unit	Business unit.
Region	Region.
Territory	Territory.
Industry	Industry.
Customer	Customer.
Sales User	Sales user, representative,
Adjusted By	The party who adjusted the opportunities,
Product Group	Product group code.
Product	Product.
Opportunity ID	Code that is assigned to an opportunity.
Opportunity Status	Designation that is assigned to opportunities to indicate their progress toward closing sales.
Sales Model	The sales methodology that is used to advance opportunities toward closure.
Sales Stage	The phase where a sales model is, in relation to the deal that is being closed.
Stage % Close	Percentage that an opportunity has progressed towards closing the deal. One hundred percent represents a closed sale.
Confidence %	Sales representative's degree of confidence that a deal will be closed, expressed as a percentage.

Forecast Type Forecast type.

View Organization Page

Usage	Use the View Organization page to examine the tree structure that forms the sales organization that produces the sales figures in the revenue forecast summary. **Note.** The View Organization page is a display-only page. To make changes to or drill down into the tree, you must work from the Manage Sales Territories menu. The View Organization page shows the part of the organization's structure that the user has permission to see. For example, if the user has access to the Western region, only the Western region will be displayed.
Object Name	RSF_FCAST_TREE_SEC
Navigation	Click the View Organization link.
Prerequisites	Set up territory trees.

View Organization page

The View Organization page is a display-only page that shows the reporting structure going up to your user profile.

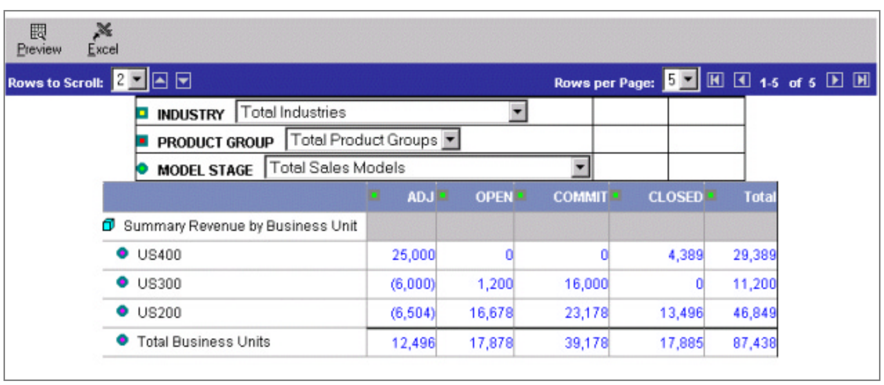
Sales Activity Insight Pages

Usage	Use the Sales Activity Insight to sort and filter your forecasting numbers. You can drag and drop dimensions that are delivered with your system. For example, you can quickly see the total revenue by business unit, region, territory and sales rep. **Note.** Sales Activity Insight is delivered with predefined dimensions. When using Sales Activity Insight, you can reorganize existing data but you cannot edit it.
Navigation	Click on Quick View-Forecast Summary or Quick View-Forecast Comparison.

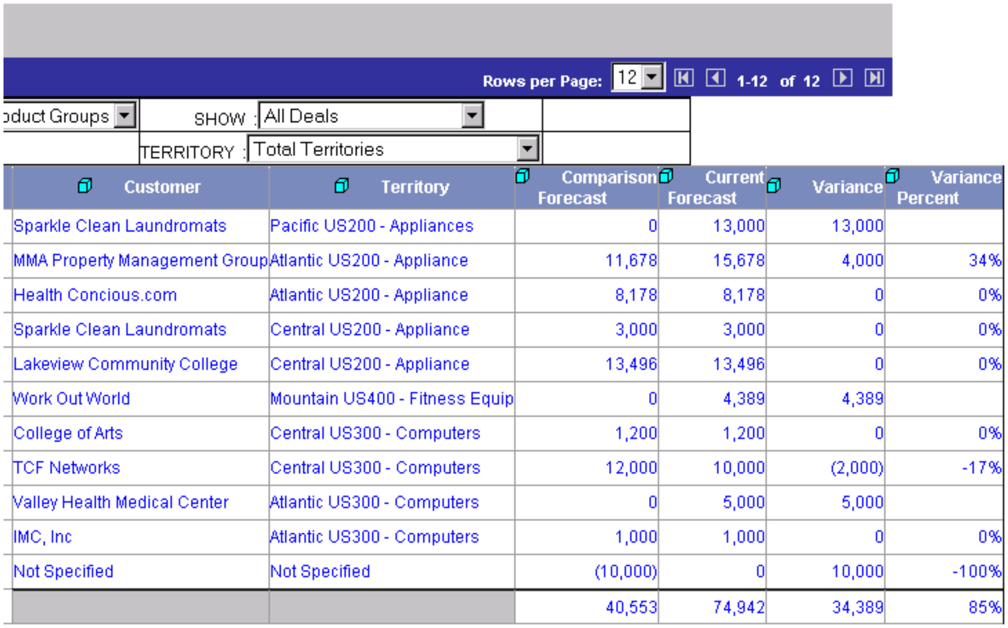
Sales Activity Insight is facilitated through the use of the PeopleSoft Business Analysis Modeler and is delivered with preset dimensions that you can use to organize and examine your data. It is a robust drag-and-drop tool.

The PeopleSoft Business Analysis Modeler enables you to model your enterprise to help you analyze, strategize, and forecast intelligently. It integrates your company's knowledge and information into a systematic and adaptable model that aids strategic planning. Use the delivered model to test ideas, modify assumptions, and run alternative business scenarios.

When you click the colored button alongside a dimension and drag it onto your revenue categories, your screen is refreshed and your financial data is organized to show revenue by dimension. For example, dragging the **Product Group** dimension onto your revenue categories creates a display of revenue by Product Group. To undo the view, just click the colored button alongside the example of the dimension and drag it onto the work space above your revenue numbers.



Quick View-Forecast Summary



Customer	Territory	Comparison Forecast	Current Forecast	Variance	Variance Percent
Sparkle Clean Laundromats	Pacific US200 - Appliances	0	13,000	13,000	
MMA Property Management Group	Atlantic US200 - Appliance	11,678	15,678	4,000	34%
Health Concious.com	Atlantic US200 - Appliance	8,178	8,178	0	0%
Sparkle Clean Laundromats	Central US200 - Appliance	3,000	3,000	0	0%
Lakeview Community College	Central US200 - Appliance	13,496	13,496	0	0%
Work Out World	Mountain US400 - Fitness Equip	0	4,389	4,389	
College of Arts	Central US300 - Computers	1,200	1,200	0	0%
TCF Networks	Central US300 - Computers	12,000	10,000	(2,000)	-17%
Valley Health Medical Center	Atlantic US300 - Computers	0	5,000	5,000	
IMC, Inc	Atlantic US300 - Computers	1,000	1,000	0	0%
Not Specified	Not Specified	(10,000)	0	10,000	-100%
		40,553	74,942	34,389	85%

Quick View-Forecast Comparison

Understanding Shadow Forecasts

A shadow forecast differs from a revenue forecast in that a shadow forecast projects the monetary amount that is related to the opportunities that will be credited to a sales representative's sales quota whereas a revenue forecast projects sales during a specific period of time.

Shadow forecasts are operational in nature; revenue forecasts are financial. Shadow forecasts are used to evaluate the performance of sales staff by comparing a quota to the shadow revenue allocation. Revenue forecasts are used for guidance as to the amount of revenue that will come to the enterprise.

Below are some examples. The first tables (top row) in each example show the opportunity forecast. The second tables (second row) in each show the sales team on the opportunity.

Example 1

Opportunity	*Customer*	*Product Group*	*Forecast Amount*	*Close Date*
Opportunity 1	Intel	CRM	$100,000	03/31/01

Sales User	*Revenue %*	*Shadow %*
SREP1	100	100

One representative works the deal and gets all the credit.

- $100,000 appears on SREP1's Revenue forecast.
- $100,000 appears on SREP1's Shadow forecast.

Example 2

Opportunity	***Customer***	***Product Group***	***Forecast Amount***	***Close Date***
Opportunity 2	Kodak	EPM	$600,000	03/31/01

Sales User	***Revenue %***	***Shadow %***
SREP1	50	50
SREP2	50	50

Two representatives work the deal and split everything down the middle.

- $300,000 appears on SREP1's Revenue forecast.
- $300,000 appears on SREP2's Revenue forecast.
- $300,000 appears on SREP1's Shadow forecast.
- $300,000 appears on SREP2's Shadow forecast.

Example 3

Opportunity	***Customer***	***Product Group***	***Forecast Amount***	***Close Date***
Opportunity 3	Chrysler	SCM	$1,000,000	03/31/01

Sales User	***Revenue %***	***Shadow %***
SREP1	100	90
SREP2	0	10

SREP1 owns the deal. SREP2 helps out.

- $1,000,000 appears on SREP1's Revenue forecast.
- $0 appears on SREP2's Revenue forecast.
- $900,000 appears on SREP1's Shadow forecast (SREP1 gets most of the credit toward his or her quota).

- $100,000 appears on SREP2's Shadow forecast (SREP2 gets some credit toward his or her quota for helping out on the deal)

Example 4

Opportunity	***Customer***	***Product Group***	***Forecast Amount***	***Close Date***
Opportunity 4	P&G	CRM	$500,000	03/31/01

Sales User	***Revenue %***	***Shadow %***
SREP1	100	100
SREP2	0	20

SREP1 owns the deal and needs help. SREP2's manager says SREP2 can help but he needs 20 percent of the credit. SREP1 tells his manager that he's not giving up 20 percent of his revenue. SREP1's manager says, "Don't worry, we'll give you 100 percent of the credit anyway.”

- $500,000 appears on SREP1's Revenue forecast.
- $0 appears on SREP2's Revenue forecast.
- $500,000 appears on SREP1's Shadow forecast (SREP1 gets full credit toward his or her quota).
- $100,000 appears on SREP2's Shadow forecast (SREP2 gets some credit toward his or her quota for helping out on the deal).

Note that the total Shadow percentage is 120 percent. Twenty percent of the revenue has been double-counted. One hundred twenty percent of the deal is credited to quotas. Obviously this increases the *cost of sale* of the deal, but this scenario has business merit in some cases.

Generate Shadow Forecast Page

Usage	Use the Generate Shadow Forecast page to create forecasts that are based on shadow or sales support activities. Shadow percentages and amounts are assigned in the Sales Team region of the Opportunity Detail page. **Note.** A shadow percentage is a figure that represents sales and sales support activities towards meeting sales quotas. In a particular deal, shadow percentages can add up to more than 100 percent, which translate to a higher cost of sale. However, when you are working with percentages on actual revenue figures, the percentages must add up to 100 percent. For example, a technical specialist who consults on a deal may be assigned a 10 percent shadow percentage toward his sales quota, but the contribution may not be recognized in the actual revenue figures.
Object Name	RSF_FCAST_ENTER

Navigation	**Manage Sales, Manage Sales Forecast, Use, Generate Shadow Forecast**

The Generate Shadow Forecast page has the same functionality as the Generate Revenue Forecast page.

For more information and a discussion of the page elements on this page, see the **Generate Revenue Forecast Page**.

Shadow Forecast Rollup Page

Usage	Use the Shadow Forecast Rollup page to examine the sales performance or progress of a reporting business unit. The information that one has available on the Shadow Forecast Rollup Page is determined by the organization of the company's territory tree. Managers can see only the forecasts of their staffs. Sales representatives cannot see the forecasts of their peers. **Note.** A shadow amount is a figure that represents sales support activities toward meeting sales quotas.
Object Name	RSF_FCAST_REVIEW
Navigation	**Manage Sales, Manage Sales Forecasting, Use, Shadow Forecast Rollup**

The Shadow Forecast Rollup page has the same functionality as the Revenue Forecast Rollup page.

For more information and a discussion of the page elements on this page, see the **Revenue Forecast Rollup Page**.

Shadow Forecast Summary Page

Usage	Use the Shadow Forecast Summary Page to work with an overview of your shadow forecasting figures. You can create forecasts, based on selecting different criteria, and then examine the results of combinations of criteria with a drag-and-drop modeling tool that is accessible from the Shadow Forecast Summary page. **Note.** A shadow amount is a figure that represents sales support activities toward meeting sales quotas.
Object Name	RSF_FCAST_VIEW
Navigation	**Manage Sales, Manage Sales Forecasting, Use, Shadow Forecast Summary**

The Shadow Forecast Summary page has the same functionality as the Revenue Forecast Summary page.

For more information and a discussion of the page elements on this page, see the **Revenue Forecast Summary Page**.

CHAPTER 7

Running PeopleSoft CRM Sales Reports

PeopleSoft CRM Sales provides you with multiple predefined reports. You can use these reports to monitor the activities of your call center. For example, you can view all of the cases handled by an agent or department; or you can view all cases in a business unit, sorted by problem type, status, or priority.

List of PeopleSoft CRM Sales Reports

The following PeopleSoft CRM Sales reports are delivered predefined with your system:

Report Name	***Report ID***	***Location***
Activity Summary report	RSFC1000	Manage Sales, Manage Sales Opportunities, Reports, Activity Summary
Company report	RSFC1001	Manage Sales, Manage Sales Opportunities, Reports, Activity Summary, Company Report
Customer Revenue Ranking By Product Group report	RSFC1002	Manage Sales, Manage Sales Opportunities, Reports, Cust Rev Rank By Prod Group
Forecast By Product Group report	RSFC1003	Manage Sales, Manage Sales Forecast, Reports, Forecast By Product
Forecast By Sales Representative report	RSFC1004	Manage Sales, Manage Sales Forecast, Reports, Forecast By Sales Rep
Opportunity report	RSFC1005	Manage Sales, Manage Sales Opportunities, Reports, Opportunity Report
Product Group Review Revenue Analysis report	RSFC1007	Manage Sales, Manage Sales Forecast, Reports, Product Group Review Revenue
Revenue Fallout Analysis report	RSFC1009	Manage Sales, Manage Sales Forecast, Reports, Revenue Fallout Analysis

Customer Revenue Ranking By Industry report	RSFC1010	Manage Sales, Manage Sales Opportunities, Reports, Cust Rev Rank By Industry
Customer Revenue Ranking By Region report	RSFC1011	Manage Sales, Manage Sales Opportunities, Reports, Cust Rev Rank By Region
Product Group report	RSFC1013	Manage Sales, Manage Sales Forecast, Reports, Product Group

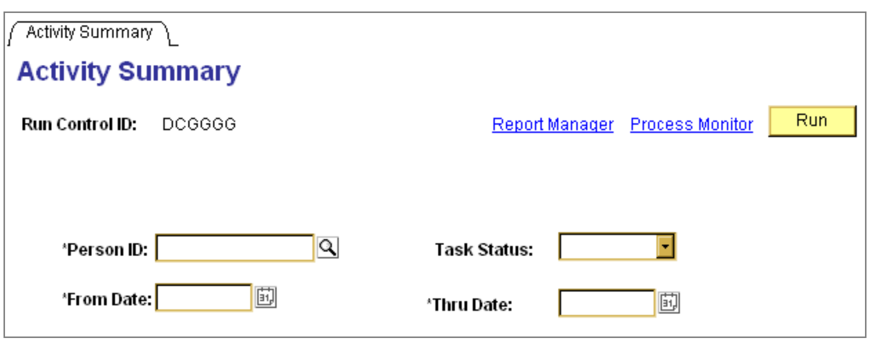
Activity Summary Report

Use the Activity Summary report to display information about activities conducted by sales representatives.

Report ID	RSFC1000
Type of Report	Crystal
Source	RUN_RSFC1000

Activity Summary Report Run Control Page

Usage	Use the Activity Summary report run control page to generate the Activity Summary report.
Object Name	RUN_RSFC1000
Navigation	**Manage Sales, Manage Sales Opportunities, Reports, Activity Summary**
Access Requirements	Enter a Run Control ID.



Activity Summary page

Run Control ID Code that uniquely identifies the instance of running the report.

Person ID Select a person.

Task Status	Select a task status.
From Date	Select the first date of the period to be described in the report.
Thru Date	Select the last date of the period to be described in the report.
Report Manager	Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

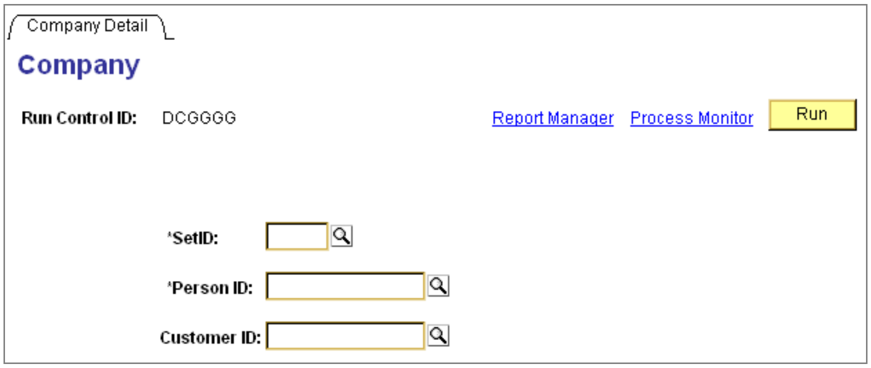
Company Report

The Company report displays information about companies with which you conduct business.

Report ID	RSFC1001
Type of Report	Crystal
Source	RUN_RSFC1001

Company Report Run Control Page

Usage	Use the Company report run control page to generate the Company report.
Object Name	RUN_RSFC1001
Navigation	**Manage Sales, Manage Sales Opportunities, Reports, Activity Summary, Company Report**
Access Requirements	Enter a Run Control ID.



Company Detail page

Run Control ID	Code that uniquely identifies the instance of running the report.
SetID	Select the setID within which the activities to be included in the report take place.
Person ID	Select a person.
Customer ID	Select a customer.
Report Manager	Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

Customer Revenue Ranking By Product Group Report

The Customer Revenue Ranking By Product Group report displays customers by revenue generated, by product group.

Report ID	RSFC1002
Type of Report	Crystal
Source	RUN_RSFC1002

Customer Revenue Ranking By Product Group Report Run Control Page

Usage	Use the Customer Revenue Ranking By Product Group report run control page to generate the Customer Revenue Ranking By Product Group report.
Object Name	RUN_RSFC1002
Navigation	**Manage Sales, Manage Sales Opportunities, Reports, Cust Rev Rank By Prod Group**
Access Requirements	Enter a Run Control ID.

Cust Rev Bus Prod page

Run Control ID Code that uniquely identifies the instance of running the report.

Business Unit Business unit within which the activities to be included in the report take place.

Product Group Select a product group to be included in the report.

From Date Select the first date of the period to be described in the report.

Thru Date Select the last date of the period to be described in the report.

Currency Code Select the currency in which the activities to be included in the report were conducted.

Report Manager Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

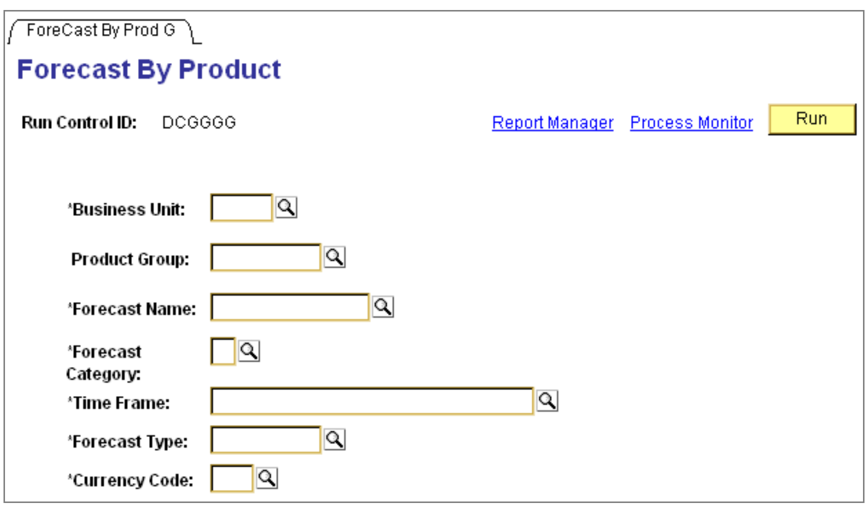
Forecast By Product Group Report

The Forecast By Product Group report to displays forecast information, by product group.

Report ID	RSFC1003
Type of Report	Crystal
Source	RUN_RSFC1003

Forecast By Product Group Report Run Control Page

Usage	Use the Forecast By Product Group report run control page to generate the Forecast By Product Group report.
Object Name	RUN_RSFC1003
Navigation	**Manage Sales, Manage Sales Forecast, Reports, Forecast By Product**
Access Requirements	Enter a Run Control ID.



ForeCast By Prod G page

Run Control ID Code that uniquely identifies the instance of running the report.

Business Unit Business unit within which the activities to be included in the report take place.

Product Group Select a product group to be included in the report.

Forecast Name	Select a forecast name.
Forecast Category	Select a forecast category.
Time Frame	Select a time frame.
Forecast Type	Select a forecast type.
Currency Code	Select the currency in which the activities to be included in the report were conducted.
Report Manager	Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

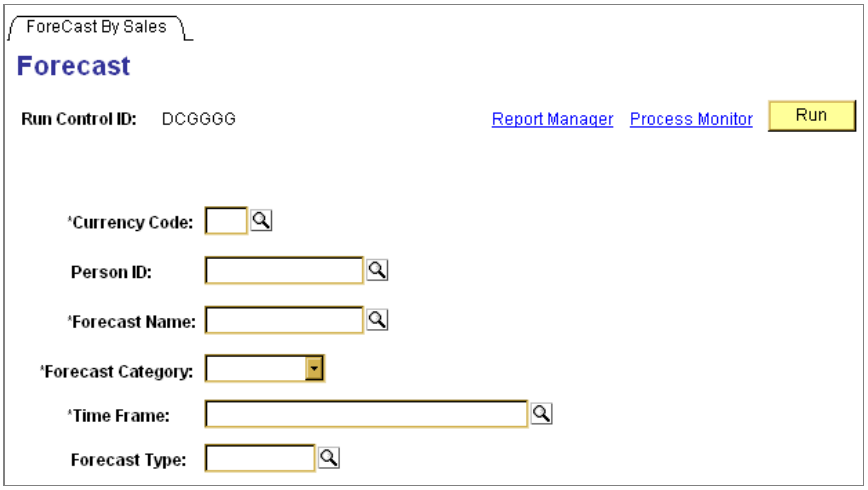
Forecast By Sales Representative Report

The Forecast By Sales Representative report displays information about the activities of sales representatives.

Report ID	RSFC1004
Type of Report	Crystal
Source	RUN_RSFC1004

Forecast By Sales Representative Report Run Control Page

Usage	Use the Forecast By Sales Representative report run control page to generate the Forecast By Sales Representative report.
Object Name	RUN_RSFC1004
Navigation	**Manage Sales, Manage Sales Forecast, Reports, Forecast By Sales Rep**
Access Requirements	Enter a Run Control ID.



ForeCast By Sales page

Run Control ID Code that uniquely identifies the instance of running the report.

Currency Code Select the currency in which the activities to be included in the report were conducted.

Person ID Select a person.

Forecast Name Select a forecast name.

Forecast Category Select a forecast category.

Time Frame Select a time frame.

Forecast Type Select a forecast type.

Report Manager Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

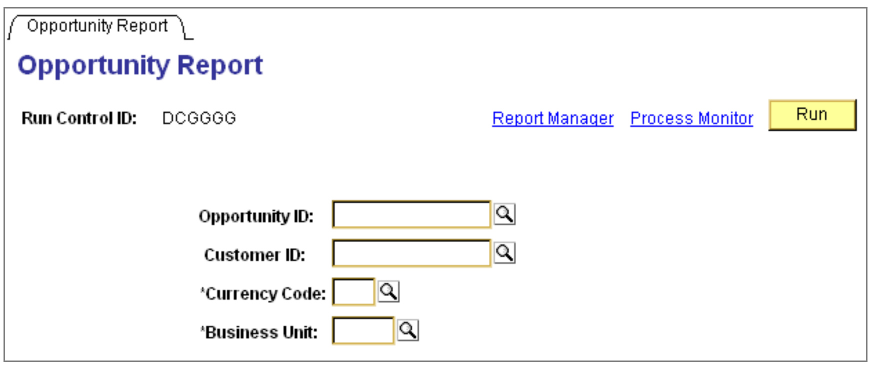
Opportunity Report

The Opportunity report displays information about opportunities.

Report ID	RSFC1005
Type of Report	Crystal
Source	RUN_RSFC1005

Opportunity Report Run Control Page

Usage	Use the Run Control page to generate the Opportunity report.
Object Name	RUN_RSFC1005
Navigation	**Manage Sales, Manage Sales Opportunities, Reports, Opportunity Report**
Access Requirements	Enter a Run Control ID.



Opportunity Report page

Run Control ID Code that uniquely identifies the instance of running the report.

Opportunity ID Select an opportunity.

Customer ID Select a customer.

Currency Code Select the currency in which the activities to be included in the report were conducted.

Business Unit Business unit within which the activities to be included in the report take place.

Report Manager Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

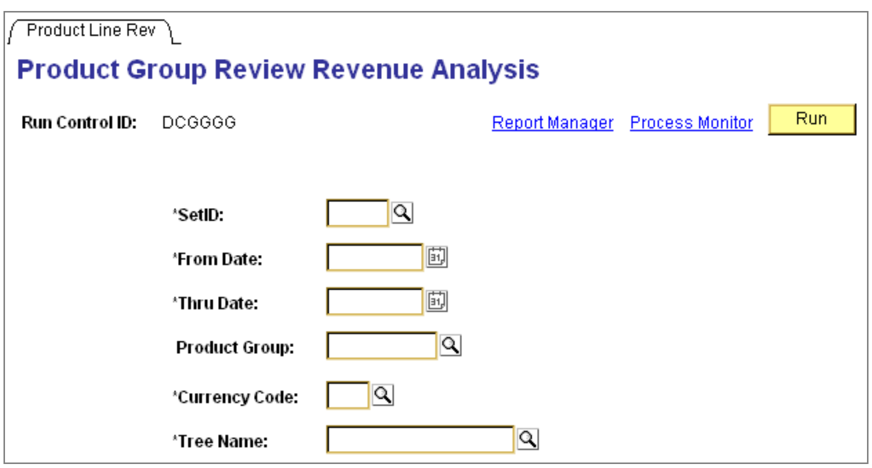
Product Group Review Revenue Analysis Report

The Product Group Review Revenue Analysis report displays information about revenue by product group.

Report ID	RSFC1007
Type of Report	Crystal
Source	RUN_RSFC1007

Product Group Review Revenue Analysis Report Run Control Page

Usage	Use the Product Group Review Revenue Analysis report run control page to generate the Product Group review Revenue Analysis report.
Object Name	RUN_RSFC1007
Navigation	**Manage Sales, Manage Sales Forecast, Reports, Product Group Review Revenue**
Access Requirements	Enter a Run Control ID.



Product Group Review Revenue Analysis page

Run Control ID Code that uniquely identifies the instance of running the report.

SetID Select the setID within which the activities to be included in the report take place.

From Date Select the first date of the period to be described in the report.

Thru Date Select the last date of the period to be described in the report.

Product Group Select a product group to be included in the report.

Currency Code Select the currency in which the activities to be included in the report were conducted.

Tree Name Select a tree.

Report Manager Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

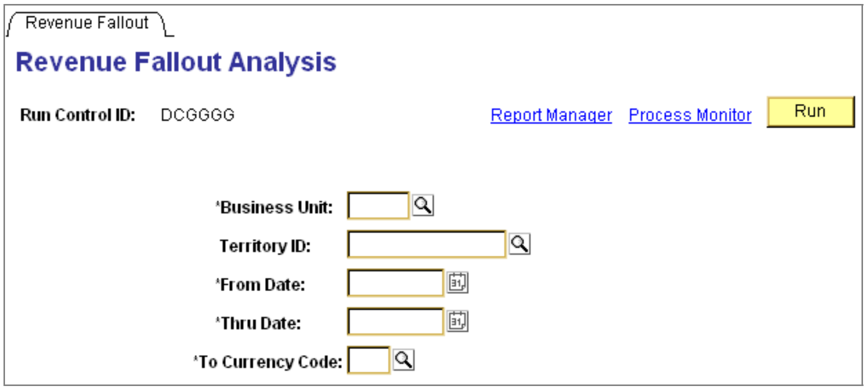
Revenue Fallout Analysis Report

The Revenue Fallout Analysis report displays information about revenue fallout.

Report ID	RSFC1009
Type of Report	Crystal
Source	RUN_RSFC1009

Revenue Fallout Analysis Report Run Control Page

Usage	Use the Revenue Fallout Analysis report run control page to generate the Revenue Fallout Analysis report.
Object Name	RUN_RSFC1009
Navigation	**Manage Sales, Manage Sales Forecast, Reports, Revenue Fallout Analysis**
Access Requirements	Enter a Run Control ID.



Revenue Fallout page

Run Control ID Code that uniquely identifies the instance of running the report.

Business Unit Business unit within which the activities to be included in the report take place.

Territory ID Select a territory.

From Date Select the first date of the period to be described in the report.

Thru Date Select the last date of the period to be described in the report.

To Currency Code Select the currency in which the activities to be included in the report were conducted.

Report Manager Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

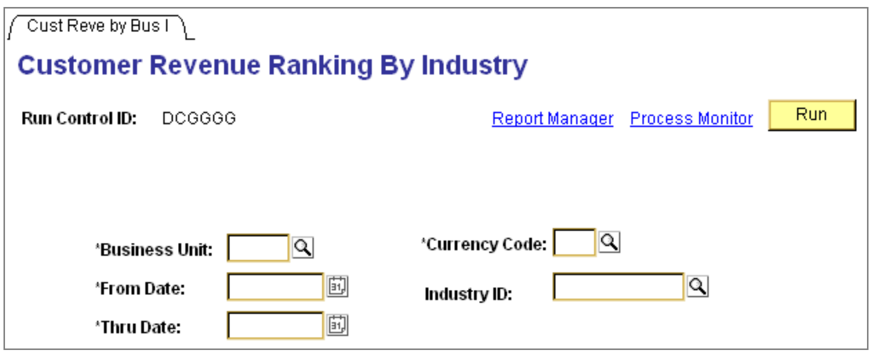
Customer Revenue Ranking By Industry Report

The Customer Revenue Ranking By Industry report to displays information about the revenue generated by industry.

Report ID	RSFC1010
Type of Report	Crystal
Source	RUN_RSFC1010

Customer Revenue Ranking By Industry Report Run Control Page

Usage	Use the Customer Revenue Ranking By Industry report run control page to generate the Customer Revenue Ranking By Industry report.
Object Name	RUN_RSFC1010
Navigation	**Manage Sales, Manage Sales Opportunities, Reports, Cust Rev Rank By Industry**
Access Requirements	Enter a Run Control ID.



Customer Revenue Ranking By Industry page

Run Control ID Code that uniquely identifies the instance of running the report.

Business Unit Business unit within which the activities to be included in the report take place.

Currency Code Select the currency in which the activities to be included in the report were conducted.

From Date Select the first date of the period to be described in the report.

Thru Date Select the last date of the period to be described in the report.

Industry ID Select an industry.

Report Manager Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor	Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

Customer Revenue Ranking By Region Report

The Customer Revenue Ranking By Region report displays customer information by revenue.

Report ID	RSFC1011
Type of Report	Crystal
Source	RUN_RSFC1011

Customer Revenue Ranking By Region Report Run Control Page

Usage	Use the Customer Revenue Ranking By Region report run control page to generate the Customer Revenue Ranking By Region report.
Object Name	RUN_RSFC1011
Navigation	**Manage Sales, Manage Sales Opportunities, Reports, Cust Rev Rank By Region**
Access Requirements	Enter a Run Control ID.

Customer Revenue Ranking By Region page

Run Control ID	Code that uniquely identifies the instance of running the report.
Business Unit	Business unit within which the activities to be included in the report take place.
Currency Code	Select the currency in which the activities to be included in the report were conducted.
Region ID	Select a region.
From Date	Select the first date of the period to be described in the report.
Thru Date	Select the last date of the period to be described in the report.
Report Manager	Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

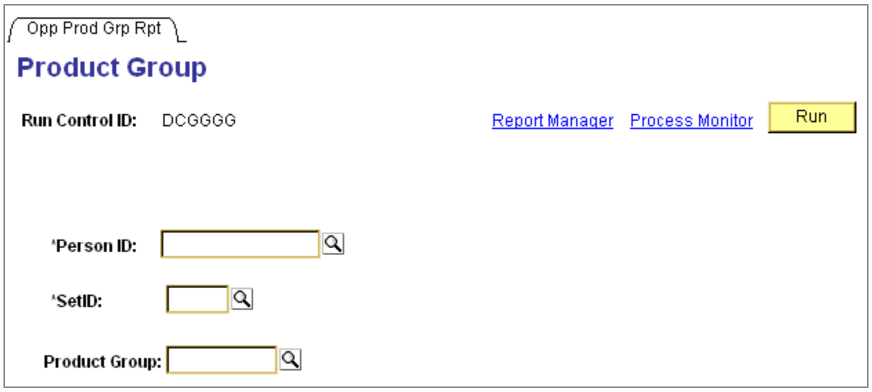
Product Group Report

The Product Group report displays information about product lines and products.

Report ID	RSFC1013
Type of Report	Crystal
Source	RUN_RSFC1013

Product Group Report Run Control Page

Usage	Use the Product Group report run control page to generate the Product Group report.
Object Name	RUN_RSFC1013
Navigation	**Manage Sales, Manage Sales Forecast, Reports, Product Group**
Access Requirements	Enter a Run Control ID.



Product Group page

Run Control ID	Code that uniquely identifies the instance of running the report.
Person ID	Select a person.
SetID	Select the setID within which the activities to be included in the report take place.
Product Group	Select a product group to be included in the report.
Report Manager	Click **Report Manager** to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click **Process Monitor** to access the Process List page, where you can view the status of submitted process requests.

Click **Run** to run the report using Process Scheduler.

For more information about the Report List page, the Process List page, and the Process Scheduler, see Process Scheduler Basics.

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