Oracle Sales Cloud
Using Sales

This guide also applies to on-premise implementations

Release 8

April 2014
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Preface

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

Oracle Fusion Applications Help

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

Note

If you don’t see any help icons on your page, then click the Show Help icon button in the global area. However, not all pages have help icons.

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

Oracle Fusion Applications Guides

Oracle Fusion Applications guides are a structured collection of the help topics, examples, and FAQs from the help system packaged for easy download and offline reference, and sequenced to facilitate learning. To access the guides, go to any page in Oracle Fusion Applications Help and select Documentation Library from the Navigator menu.

Guides are designed for specific audiences:

- **User Guides** address the tasks in one or more business processes. They are intended for users who perform these tasks, and managers looking for an overview of the business processes. They are organized by the business process activities and tasks.

- **Implementation Guides** address the tasks required to set up an offering, or selected features of an offering. They are intended for implementors. They are organized to follow the task list sequence of the offerings, as displayed within the Setup and Maintenance work area provided by Oracle Fusion Functional Setup Manager.

- **Concept Guides** explain the key concepts and decisions for a specific area of functionality. They are intended for decision makers, such as chief
financial officers, financial analysts, and implementation consultants. They are organized by the logical flow of features and functions.

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

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

<table>
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<td>Explains tasks within the Define Common Applications Configuration task list, which is included in all offerings.</td>
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<td>Implementors</td>
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For other guides, go to Oracle Technology Network at http://www.oracle.com/technetwork/indexes/documentation.

**Other Information Sources**

**My Oracle Support**

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

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

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

In Oracle Fusion Applications, you can use Oracle Enterprise Repository at http://fusionappsoer.oracle.com for:

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

- Other technical information such as reusable components, policies, architecture diagrams, and topology diagrams.

Documentation Accessibility

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

Comments and Suggestions

Your comments are important to us. We encourage you to send us feedback about Oracle Fusion Applications Help and guides. Please send your suggestions to oracle_fusion_applications_help_ww_grp@oracle.com. You can use Send Feedback to Oracle from the Settings and Actions menu in Oracle Fusion Applications Help.
Manage Sales Planning and Forecasting

Sales Forecasting Features: Overview

Forecasting future sales is a method of providing predictions of future revenue for specific time periods. Sales forecast data is used to set production schedules and volumes to determine resource requirements to effectively meet customer demand and to report financial guidance to investors.

Summary of Features

The key features of sales forecasting include the following:

- Forecasts are generated for each sales territory and are then rolled up following the territory hierarchy. Changes to the active territory hierarchy are periodically synchronized with the forecast hierarchy. A date is set after which the hierarchy is frozen, and the forecast is available for editing.

- The schedule of forecast periods is predefined.

- Salespeople finalize their territory forecasts for the current time and submit them to the owners of parent territories. Owners of higher-level territories can view, change, and adjust forecasts at lower levels in their hierarchy.

- The forecast for a period is automatically generated from eligible opportunity revenue items scheduled to close within the period. Forecasts are refreshed from the pipeline revenue in real time, and forecast item changes are written to the opportunity immediately. Opportunities and forecast items maintain their synchronicity until the forecast items are submitted for final approval.

- You set the criteria that determine whether a revenue item is eligible to be automatically included in a forecast.

- You can provide the option for salespeople to override the established criteria and manually include or exclude a revenue item from the forecast.

- Nonrevenue forecasts allow nonprimary salespeople to forecast sales expectations for all nonrevenue sales credits. You can record nonrevenue forecasts on opportunity revenue transactions in addition to the revenue sales credit split.
• You can view current, future, and past forecasts. The current forecast is open for editing at certain times and then frozen.

• You can adjust forecasts. A revenue-item adjustment is an upward or downward adjustment to a specific forecast item: Revenue, Best Case, or Worst Case values. A summary adjustment is an upward or downward adjustment to the overall territory forecast that is not associated with any specific deal. Adjustments are visible to higher levels in the hierarchy, but not to lower levels.

• Use predefined graphs to analyze forecasts, or add your own graphs.

Sales Forecast Components: How They Work Together

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

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

<table>
<thead>
<tr>
<th>Revenue Items</th>
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| A revenue item from an opportunity must have a designated close date that falls within the forecast period to be included in the forecast. The criteria for the revenue item must match the criteria set for the forecast. For example, if the forecast criteria specify a win probability of greater than 75 percent, then a revenue item with a win probability of 80 percent is added to the forecast.

If the ability to override is enabled, then a salesperson can include a revenue item in the forecast even though it does not match the criteria, or exclude a revenue item that matches the criteria.
It is possible for managers to pull in forecast items as adjustments that do not match the close date or criteria and override conditions.

**Unadjusted Forecast**

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

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

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

**Sales Forecast Adjustments: Explained**

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

The adjusted best case forecast is the sum of:

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

The adjusted worst case forecast is the sum of:

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

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

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

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

**Unallocated Forecast Adjustments: Explained**

In the Forecast Summary tab, whenever a parent has children, an additional child is added called Unallocated. A deal that is for the parent itself appears as unallocated until you can determine which child to move the deal to. When an adjustment is made to the parent the adjustment amount appears in the Unallocated child row until you distribute it among the children using one of several ways.
You can manually alter the children until the unallocated amount reaches zero. If you over-allocate without reaching zero, then the unallocated amount can become negative.

Use the Allocate to children action to divide the amount up proportionately amongst the children based on the percentage that each child makes up the parent adjusted forecast. If all children are zero, then the amount is divided equally. If you allocate to grandchildren, then the process is the same except that the amount is allocated to both children and grandchildren, but not farther down the territory hierarchy.

Recalculate from Grandchildren changes the selected parent’s children so that each child is equal to the sum of the value for the editable grandchildren. It also changes the selected row to equal the sum of the value for the newly recalculated children so that unallocated is zero for the selected row in addition to being zero for the children of the selected territory. Recalculate from Children changes the selected row so that the value is equal to the sum of the value for the children, and unallocated is zero.

**Forecasting by Product and Time**

Start your forecast adjustments at the product level and if required then spread your adjustments across product and time. When you start at the summary level, by product, then your adjustments appear as unallocated amounts for time as well as for lower levels of the product hierarchy. You then need to divide the unallocated amounts down the product hierarchy and among the dimensions for time.

You can choose to forecast only by product, or by product and time.

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

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

**How Forecast Export Is Processed**

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

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

**FAQs for Manage Sales Planning and Forecasting**

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

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

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

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

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

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

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

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

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

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

**When do I submit my forecast?**

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

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

What happens if I filter by adjusted forecast?

When you view the territory forecast by product in the Forecast Summary tab, you can select to filter by adjusted forecast. The table then displays products within the selected territory definition that have either an adjusted forecast value or an adjustment value that is not zero.

What happens if I select Forecasted by Parent Territory?

The territory is hidden in the Forecasting Overview page, but is available on the Edit Forecast page. The owner of the parent territory can submit the forecast for the child territory. If the child territory owner also owns the parent territory, then the territory owner can edit forecast items, add and remove forecast items as adjustments, and adjust the territory forecast.

What's a likelihood to buy product?

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

What's an estimated revenue?

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

What's a pipeline?

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

**What's an expected forecast?**

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

**What's a quota?**

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

**What's closed revenue?**

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

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

The best case forecast metric is the sum of all best case revenue values for all forecast items in the forecast period. You can enter the best case revenue amount when you change the revenue line item details in an opportunity.

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

The worst case forecast metric is the sum of all worst case revenue values for all forecast items in the forecast period. You can enter the worst case revenue amount when you change the revenue line item details in an opportunity.

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

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

The unallocated amount is divided up proportionately amongst the children based on the percentage each child makes up the parent adjusted forecast. If all children are zero, then the amount is divided equally.
Why did the parent adjusted forecast not change when I adjusted the child?

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

Sales Object Assignment Overview

**What's assignment manager?**

In opportunities, the assignment manager, or assignment engine, works to assign sales team members to opportunities based on certain parameters.

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

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

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

Territory plays a fundamental role in Oracle Sales Cloud. Using attributes it defines how a company is going to market. That is, how is that company deciding to deploy its Sales Resources to sell to Customers? Every Sales Account, Lead, and Opportunity has a territory or territories assigned. In many cases, customers will implement Territories down to the level of individual Sales Representative (that is, each Sales Representative will have his or her own Territory) in order to enable these capabilities at the granularity that they want, as well as the Sales Planning/Territory Alignment capabilities at the granularity that they want.

In a territory-based assignment scenario, you typically create a mapping set between a work object and a candidate object to make the appropriate candidate assignment. This mapping set can consist of 1 or more mappings between the work object attributes and the candidate object attributes.
A simple example territory-based assignment setup is a single mapping set between the opportunity revenue line work object and the candidate object of territory. This mapping set contains a single mapping which maps the attribute of location on the opportunity (the parent of the revenue line) to the geography attribute on the territory. Any territories where the geography value matches the location of the parent opportunity are matched and assigned to that opportunity revenue line. Another example would be two mapping sets defined between the lead work object and the territory candidate object. The first mapping set determines the assignment of territories to each lead based on a mapping between the industry of the customer on the lead and the territory industry dimension. This would be a literal mapping that filters the territories to those that have a status of finalized and a literal mapping that filters the territories to those that have a sales centric coverage model. The second mapping set is conditional and determines the assignment of partner channel manager territories. This mapping set consists of a mapping between the geography of the primary partner on the lead and the territory geography dimension. This would be a literal mapping that filters the territories to those that have a status of finalized and a literal mapping that filters the territories to those that have a partner centric coverage model.

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

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

<table>
<thead>
<tr>
<th>Territory-Based Assignment</th>
<th>Rules-Based Assignment</th>
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</thead>
<tbody>
<tr>
<td><strong>Pros:</strong></td>
<td><strong>Pros:</strong></td>
</tr>
<tr>
<td>• User-friendly territory management</td>
<td>• Familiar concept with expression-based rules</td>
</tr>
<tr>
<td>• Minimal assignment configuration</td>
<td>• Any attribute can drive an assignment</td>
</tr>
<tr>
<td>• Support for hierarchies</td>
<td>• Easy to define and maintain a small number of straightforward rules</td>
</tr>
<tr>
<td>• Preview of assignment</td>
<td>• Scoring and classification</td>
</tr>
<tr>
<td>• Reports to identify gaps and overlaps</td>
<td><strong>Cons:</strong></td>
</tr>
<tr>
<td><strong>Cons:</strong></td>
<td><strong>Cons:</strong></td>
</tr>
<tr>
<td>• Additional administration required even with simple territory models</td>
<td>• Unable to navigate hierarchies</td>
</tr>
<tr>
<td>• Single territory structure for Sales Cloud</td>
<td>• Requires intensive effort to manage complex or large numbers of rule</td>
</tr>
</tbody>
</table>

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

Work objects, candidate objects, and attributes are components used to create the assignment objects that are used in rule and territory-based assignment.
When you create work objects and candidate objects, you can select attributes which will be used in assignment mappings or rules. For example, the lead work object attribute Primary Product can be added as an assignment attribute and later used in a mapping to associate it with the territory (candidate object) product dimension.

Candidate objects are also available to associate with work objects. For example, the Territory candidate object is associated with the Lead work object. This is used to drive the assignment of territories to a lead.

**Adding an Assignment Object**

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>A unique name for the object with an optional description.</td>
</tr>
<tr>
<td>Code</td>
<td>A unique code used in processing the object.</td>
</tr>
<tr>
<td>Work/Candidate Object check boxes</td>
<td>Indicates if the object is a work object, candidate object or both.</td>
</tr>
</tbody>
</table>
Application Module

An Oracle Application Development Framework
(ADF) business component that encapsulates the
business service methods and UI-aware data model
for a logical unit of work related to an end-user
task. Enter the fully qualified definition name of the
consumer application, Application Module. Valid for
top level Work and Candidate objects. Child objects
automatically inherit this value from its parent.

Application Module configuration

Valid for Top Level Work and Candidate objects
except Classification Candidate objects. Child objects
will automatically inherit this value from its parent.

View Object Instance

Used to define the data model of a view object
component when designing an application module,
for example, Lead. Valid for all levels of Work and
Candidate objects except Classification Candidate
objects.
• View Criteria may be defined to filter the
information for the rows of a view object
collection. Valid for top level Work and
Candidate objects except Classification
Candidate objects.

Primary Key Attribute 1

First or only attribute that makes up the object
primary key. Valid for top level Work and Candidate
objects except Classification Candidate objects.

Refresh Interval

The number of minutes between refreshes of
candidate object data. The default setting is 0
minutes. Valid for top level Candidate objects except
Classification Candidate objects.

Initial Caches

The initial size of the cache when processing
an object. This value will be used the first time
the engine processes objects or following a
server bounce. The default value is 2, and the
maximum value is 20. Only valid for top level
Candidate objects except Classification Candidate
objects. All Work Objects that are used for
scoring, Lead, for example, use the Product Level
(MOW_SCORING_INITIAL_CACHES) Initial
caches for scoring rules profile option value.

Maximum Caches

The maximum size of the pool/cache when
processing the object. The default value is 5, and
the maximum value is 25. Only valid for top level
Candidate objects.
Note
All Work Objects that are used for scoring,
Lead for example, use the Product Level
(MOW_SCORING_MAX_CACHES) Maximum
caches for scoring rules profile option value.

Score Attribute

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The attribute on the object that stores the total
calculated score after an assignment request has
been processed. Valid for top level Work objects only.


### Adding an Assignment Attribute

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

Having selected an attribute, you can also select the diagnostic display attribute that will be shown when assignment is run in diagnostic mode. For example, selecting the address attribute which represents the user display field associated with the geography identifier attribute.

When selecting attributes for a candidate object, you will want to select the attributes you want to use when configuring assignment rules and mappings that involve that candidate object. For example, if a candidate object is resource (sales representative), and you want to show sales representatives’ first names, last names, and phone numbers when they are recommended during assignment processing, you need to select the attributes for the resource candidate object that correspond to first name, last name, and phone number, and specify the order in which these attributes appear in the recommended candidates screen.

### Relating Candidate Objects and Work Objects

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

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

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assign Candidates</td>
<td>Indicates that assignment management performs the assignment. If not set, then assignment management features are used to find the matching candidates, which are then passed to the calling application to update the work object. The behavior is seeded for each object being assigned and cannot be changed by implementations.</td>
</tr>
<tr>
<td>Custom Logic</td>
<td>Indicates that assignment management passes the result of the assignment matching to the callback function of the work object. For example, opportunities use custom logic that updates the sales team with the territory members. It stamps the territories onto the revenue line and adds the territory team members (resources) to the opportunity sales team. This logic cannot be changed by implementations.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Merge Assignment Candidates</td>
<td>Controls whether the matching assignment candidates identified from processing each set of mappings should be merged. This is used to drive the merging of matching candidates when multiple mapping sets are used in assignment processing. If the check box is checked, then the candidates are merged. The default is unchecked and should not be changed unless under the guidance of Oracle Support.</td>
</tr>
<tr>
<td>Keep Manual Candidates</td>
<td>Indicates that manually assigned candidates are retained during assignment processing. This option can be used to prevent the removal of manually added candidates during reassignment. This option is not used for managing sales accounts and opportunities as they have implemented their own lock assignment features.</td>
</tr>
<tr>
<td>Replace Candidates</td>
<td>Determines whether unqualified candidates are removed from a team when an assignment runs. For example, the first time that assignment engine runs, a territory is assigned to a sales lead. When the reassignment process runs following a territory proposal activation, the territory is no longer valid. If Replace Candidates is set, then the territory is removed from the sales lead.</td>
</tr>
<tr>
<td>Candidate Exclusion</td>
<td>Sales leads have a related object, which stores the excluded candidates for each sales lead. Assignment management functionality accesses this information, which prevents assignment of the work object to an excluded candidate. This option is only relevant to Sales leads.</td>
</tr>
<tr>
<td>Parent Attribute</td>
<td>Used by territory-based assignment to determine the hierarchy of matching territories, eliminate all parent territories, and only return and assign the matching leaf node Territories. If this attribute is not used, then all matching territories (parent or leaf) are returned and assigned.</td>
</tr>
<tr>
<td>Candidate Differentiation Attribute</td>
<td>Stores the attribute on the candidate object that is used for discriminating matching candidates. For example, for a work object like lead, you might choose the attributes of Primary Product, Customer Geography, Customer Industry, Customer Size, and Organization Type. When you configure assignment mappings for the lead work object, your chosen attributes are available. You could create a mapping for Lead using the Primary Product attribute. The setting of this attribute should not be changed unless under the guidance of Oracle Support.</td>
</tr>
<tr>
<td>Coverage Attribute</td>
<td>The territory attribute used to denote whether the candidate in the matching candidate list has a regular, included, or excluded coverage.</td>
</tr>
<tr>
<td>Maximum Number of Candidates</td>
<td>The maximum number of candidates returned for the work object and candidate object combination. The default value is 100. Implementations may need to change this value if a large number of candidates can be assigned.</td>
</tr>
</tbody>
</table>

2-6 Oracle Sales Cloud Using Sales
**Manual Attributes**
The attribute that identifies a candidate was manually assigned, rather than by the system. This attribute is used with the Keep Manual Candidates attribute.

**Keep Manual Candidates**
A flag to retain manually assigned candidates when assigning or re-assigning a work object. This option is only relevant if the manual attribute is defined and the Assigned Candidates option is checked.

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

**Score Attribute**
The score attribute in which the calculated score is stored.

**System Attribute**
The attribute that identifies a candidate was assigned by the system, rather than manually.

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**Setting Up Assignment Mappings**
Assignment mapping sets and their related mappings drive territory-based assignment. The mapping sets determine which mappings are used and the sequence in which mapping sets are used in territory-based assignment. The mappings identify the dimensions, attributes, and territory filtering used in the assignment processing. Default mapping sets and their related mappings are seeded.

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

- Business objects
- Attributes
- Resources and territories
- Assignment disposition
**Business Objects**

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

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

**Attributes**

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

**Mappings Sets and Mappings**

Assignment mapping sets and their related mappings drive territory-based assignment. The mapping sets determine which mappings are used, and the sequence mapping sets are used in territory-based assignment. The mappings identify the dimensions, attributes, and territory filtering used in the assignment processing. Default mapping sets and their related mappings are seeded.

**Rules**

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

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

**Territory Coverage: Explained**

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

A coverage includes the following parts:

- **Dimensional Coverage**: The combination of one or more territory dimensions.

- **Inclusion Coverage**: A list of selected customers or partners, regardless of the defined dimensional coverage, if any. The sales accounts for the selected customers will be assigned to the territory. These sales accounts do not have to be designated as Named accounts in Customer Center.

- **Customer Hierarchy**: You can choose to include the customer hierarchy for the selected customer. All sales accounts for the selected customer hierarchy will be assigned to the territory.

- **Filtering Conditions**: Defined dimensions apply to the included customers and their hierarchies so that only sales accounts that match the dimension definitions get assigned to the territory.

- **Other Dimensions**: Product or sales channel dimensions defined for all of the included customers or partners. Product and channel selections must fall within the jurisdiction of the parent territory if you select Restrict by parent in the dimension selection window.

- **Exclusion Coverage**: A list of excluded customers (including related sales accounts) or partners, regardless of the defined dimensional coverage. You can choose to exclude the customer hierarchy for the selected customer. All dimensions are ignored. The sales accounts do not have to be designated as Named accounts in Customer Center to be excluded.

- **Inheritance Dimension Overrides**: If the territory inherits its coverage from another territory, then its coverage exactly matches that of the source territory. But, you can enter override definitions for one or more dimensions. Dimension definitions added to the override supersede the definitions for the same dimensions contained in the dimensional coverage. The overrides are also added to the customer inclusion Filtering Conditions and Other Dimensions tables. Inheritance applies only to account centric territories, not to partner-centric territories.

**Note**

When you activate a territory proposal, a reassignment of sales accounts and opportunity revenue lines occurs for territories affected by changes in dimensional coverages. Changes to customer or partner inclusions and
exclusions require a full reassignment process. Leads always require batch reassignment.

**Territory Coverages for Partners**

A partner is an organization party with a partner profile associated and an assigned Partner usage. Partners are defined in the Partner Center.

Similar to direct sales, channel managers have corresponding sales territories pertaining to partner sales activities. Some channel managers are assigned to specific partners. Some channel managers are assigned to customers for sales activities that involve partners. Channel manager territories can be defined by the following coverage models.

- **Coverage Defined by End Customer Characteristics**
  The territory of the channel manager is solely defined based on the characteristics of the end customer, irrespective of which partner is associated with the transaction. As an example, a channel manager is assigned to cover all the indirect opportunities where the end customer is located in California. You define territories for this account-centric coverage using customer characteristics, and you can include or exclude specific customers.

- **Coverage Defined by Partner Characteristics**
  The channel manager’s territory is defined based on some characteristics of the partner, such as where the partner is located or the type of the partner (reseller, system integrator, distributor). As an example, a channel manager is assigned to cover all the indirect opportunities where the partner is located in California.

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

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

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

- **Individually Selected Partners**
  The coverage for the channel manager is defined using a selection of partners to directly assign to or exclude from his partner-centric territory.
As an example, a channel manager is assigned to a partner named AA Solutions. This channel manager will be assigned to all indirect opportunities where AA Solutions is the partner. The opportunities for included partners can be additionally qualified by product and sales channel.

**No Coverage**

You can create a territory that has no coverage. The territory is indirectly defined by the coverages of its descendant territories. You can assign quota to the territory and it can participate in forecasting. The territory cannot be automatically assigned to sales accounts, leads, and opportunities, but you can see the assignments of its descendant territories. You can also assign the territory to an opportunity revenue item as an override.

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

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

**Note**

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

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

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

**Manage Assignment Mappings**

**Mapping Set Components: How They Work Together**

Assignment mapping sets and their underlying mappings drive territory-based assignment. This topic explains how these components work together in assignment processing.

The mapping sets determine which mappings are used and their sequence of use in territory-based assignment. Mapping sets allow different groups of attributes or dimensions to be used when matching territories.
Mappings

The mappings identify the dimensions, attributes, and territory filtering used in the assignment processing. Default mapping sets and their related mappings are predefined for sales account, leads, partner accounts, and opportunity revenue assignment. This predefined mapping assumes that opportunities, leads, sales, and partner accounts use the same territory hierarchy.

Each predefined mapping set has between 9 and 16 mappings that determine the information on the object, such as the sales account industry or the sales lead product, and how each is mapped to a dimension or attribute on the territory.

You can create additional mappings using the work objects, candidate objects, and attributes that you already established.

Mapping Sets

Mapping sets enable the grouping of mappings so that you can create more than one mapping for each combination of work object and candidate object. The mapping set concept is used only with territory-based assignment and territory-based assignment with rule filtering. Mappings sets are predefined for sales accounts, leads, opportunities, and partner accounts. When managing assignment objects, the user can define additional mapping sets, each of which is comprised of multiple mappings, for each combination or work object and candidate object.

Mapping Types

There are three types of assignment mapping:

Dimension Mapping: Dimension mappings should be used when the work object and candidate object attributes in the comparison are dimension attributes, such as Geography, Product, or Account. When creating the mapping, use the Function Code field to specify a unique identifier for the dimension. This identifier is passed to the translation function, in case the same function is used for multiple dimensions.

When creating the mapping, the Function Service and Function Code are only needed if a translations function is used. The function code field is used to specify a unique identifier for the attribute, and this identifier is passed to the translation function.

An example is assigning territories to opportunity revenue lines based on the product associated with the revenue line. In this case, dimension is selected as the mapping type. The candidate object low attribute and high attribute correspond to the names of the low sequence and high sequence attributes.
for product on the territory. The work object low attribute and high attribute correspond to the names of the low sequence and high sequence attributes for product on the revenue line.

**Attribute Mapping:** This mapping enables you to compare and match attribute values between a work object attribute and a candidate object attribute. When the value of the candidate object attribute matches the work object attribute, the candidate is selected. Attribute mappings should be used when the work object and candidate object attributes in the comparison are non-dimensional attributes.

For example, consider a lead work object with a Partner Identifier attribute and the territory object with Partner ID attribute. The selection criterion is: select Sales Lead Territories where Sales Lead Territory.Partner Identifier equals Sales Lead.Lead Partner Identifier. The assignment engine will use this mapping data to construct a query on the candidate object that is equivalent to the selection criteria.

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

**Note**

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

**Assignment Processing using Mapping Sets and Mappings**

When designing your mappings, carefully consider the dimensions and attributes you use in your territory structure and how you want to match these territory candidates to work objects. Also consider the shape of the information used in the territory structure; this may affect the sequence of each mapping. A sequence can be entered for each mapping set which is used to determine the order in which these mapping sets will be used in the territory-based assignment processing. The sequence of the dimension mappings used in territory matching can affect performance. The most selective dimension mapping should be given lowest sequence number. By default, this dimension is the Geography Dimension. By using the lowest sequence number, it is performed earliest in the matching process, which results in the smallest number of territory matches. Mappings that do not have a sequence are used together at the end of the matching process.

Sometimes the mapping set sequence does not matter, for example, there are two predefined opportunity revenue assignment mapping sets. When the first mapping set is used, it finds matching territories based on the information on the opportunity/opportunity sales account, and the territory information. Then the second mapping set is used which matches territories based on the opportunity/opportunity partner information and the territory information. The order of the mapping sets are interchangeable; regardless of which mapping set is used first, the resulting territories that match will be the same.

In the case of leads, the mapping set sequence is important as the territories matched using the first mapping set may result in a primary partner being
Mapping sets can be made conditional to control whether the mapping set is used or not used during assignment processing. For example, the partner channel manager territory assignment mapping set conditional attribute is set to the value RevenuePartnerId. During the assignment processing of a revenue line, if the RevenuePartnerId attribute for that revenue line contains a value, then this mapping set will be used in territory matching processing.

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

In most implementations, the predefined mapping sets will be sufficient, but mapping sets can offer some flexibility if custom assignment processing is needed.

Creating Assignment Mappings: Examples

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

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

Creating an Attribute Mapping

You want to assign territories to a sales lead when the territory partner ID is the same as the sales lead partner ID. Create a mapping where the work object is sales lead and the candidate object is sales lead territory. Select the territory when the attribute territory partner ID is equal to the sales lead attribute partner ID. Enter a value for the sequence which determines the order in which the mapping is used when matching territories. The most selective mapping should be given lowest sequence number, the next most selective mapping should be given the next sequence number.

Creating a Dimension Mapping

You want to assign territories to opportunity revenue lines based on the product associated with the revenue line. Create a mapping where the work object is opportunity revenue line, and the candidate object is territory. Select dimension as the mapping type and enter the value Prod for the function code. Enter a value for the sequence which determines the order in which the mapping is used when matching territories. The most selective dimension mapping should be given lowest sequence number. The candidate object low and high attributes correspond to the names of the low sequence and high sequence attributes for product on the territory. The work object low and high attributes correspond to
the names of the low sequence and high sequence attributes for product on the revenue line. For example, the low sequence attribute for product on the revenue line might be called `InventoryItemId`.

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

- Mapping using default values: Using the same scenario of assigning territories to opportunity revenue lines based on the product associated with the revenue line, you might encounter a situation where the low sequence and high sequence attributes for product on a revenue line do not contain values when assignments are processed. Create the same mapping that you created for the dimension mapping scenario, and add low and high default values for the product attribute for revenue lines.

**Creating a Literal Mapping**

Literal mappings are a way of filtering the matched territories based on specific values of a territory attribute. You want to find only territories that have a sales account centric coverage model. For example, territory coverage model equals `SALES_ACCOUNT_CENTRIC`.

**Manage Assignment Rules**

**Rule Set Components: How They Work Together**

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

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

The rule administration feature prevents more than one user at a time from updating assignment rules for a product. For example, if User A is currently updating assignment rules, and User B also attempts to update assignment rules for that application at the same time, the changes made by User B will not be saved, and an error message will appear.

In the case of Assignment Rule Administration, only one user should edit assignment rules for leads at a time. The same applies to assignment rules for opportunities.
Rule Set Type

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

Filter Settings

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

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

When the rule set type is Matching Candidate, and the filter is set to Random, a random selection of matching candidates are assigned to the work object.

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

**Action**

The action setting determines the action that is performed when a rule is evaluated as true. The action setting is the one component that is set at the rule level rather than the rule set level; however, it does work in conjunction with the rule set type. When the rule set type is Classification, the rule action can only be Return the Candidate value as <value>. For example, the work object for a rule set is Lead, and the candidate object is a classification object called Lead Qualification. The rule set type is set to Classification, and the action for one of the rules in that set is Return the candidate value as QUALIFIED. If that rule is evaluated as true, the Lead Status for the Lead being classified is set to Qualified. When the rule set type is Matching Candidate, the rule action can only be Return matching candidates. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule are assigned. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or a random number of matching candidates are assigned (Random).

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

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

**Creating Assignment Rules: Examples**

Assignment rules are created using work objects, candidate objects, attributes, conditions and actions. The assignment engine uses your rules to evaluate and recommend candidate assignments for specified work objects. There are multiple types of rules you can create. The following scenarios illustrate each type:

**Managing Classification Rules**

When the following attributes for leads are set as specified, you want to classify those leads as qualified:
• Lead Customer is a sales account
• Lead Product is not NULL
• Lead Score is greater than 150

Create a rule set with a rule set type of Classification Rule. Set the work object as lead and the candidate object as lead qualification. Create a rule with the three conditions that match the attribute settings you want a lead to have in order to be considered a qualified lead. Using the Lead Product condition as an example, you would choose the Lead attribute name Primary Product ID, and then select the Does Not Equal operator. Finally, enter the value of NULL. For the Lead Customer condition, you would choose the Lead attribute name Sales Account Indicator, and then select the Equals operator. Finally, enter the value of Y. For the Lead Score condition, you would choose the Lead attribute name Score, and then select the Greater Than operator. Finally, enter the value of 150. Enter the action for your rule is Return the Candidate Value As Qualified.

Managing Scoring Rules
When the following attributes for leads are set as specified, you want to increase those leads’ scores by 150:
• Lead Time Frame is 3 months

When the following attributes for leads are set as specified, you want to increase those leads’ scores by 100:
• Budget Status is Approved
• Budget Amount is > 500000

Create a rule set with a rule set type of Scoring Rule. Set the work object as lead, and create the first rule with one condition that matches the attribute settings you want a lead to have in order to add 150 to its score. Using the Lead Time Frame condition as an example, you would choose the attribute name Time Frame, and then select the Equals operator. Select the value 3 Months. Then enter the action for your rule as Increase the Score by 150. Create your remaining rule with two conditions and action to Increase the Score by 100.

Managing Matching Candidate Rules
Identify a single candidate territory for your sales leads in one line of business and all territories for the other. Create a rule set with a rule set type of Matching Candidate Rule, a filter type of Random, and Number of Candidates of 1. Set the work object as sales lead and the candidate object as sales lead territory, and create a rule with two conditions. The first condition is the response channel on the Sales Lead equals LOB1, and the second condition is the territory type equals ignoring case Partner. If this rule is true, then only a single random matching partner territory will be assigned to the Sales Lead.

For the second line of business, create a rule set with a rule set type of Matching Candidate Rule, and a filter type of All. Set the work object as sales lead and the candidate object as sales lead territory. Create a rule with one condition with the response channel on the Sales Lead equals LOB2. If this rule is true, then all matching territories will be assigned to the Sales Lead.

Managing Matching Candidate with Scoring Rules
Assign different country specialists to opportunities in some European countries based on the country and the risk level of the Opportunity.

Create a rule set with a rule set type of Matching Candidate with Scoring Rule, a filter type of All Above Minimum Score, and the minimum score set to 20. Set
the work object as opportunity and the candidate object as resource, and create two rules each with two conditions.

The first rule has two conditions. First, choose the work object of Opportunity, choose the attribute name Customer Country, select the Equals operator, and then enter the value DE. For the second condition, choose the work object of Resource, and then choose the attribute name Name, select the equals (=) operator, and then enter a value of John Brooks. Select the action for the rule as Increase the Matching Candidate Score by 20.

The second rule has two conditions. First, choose the work object of Opportunity, choose the attribute name Country, select the In operator, and then enter the values FR and UK. For the second condition, choose the work object of Resource, choose the attribute name Name, select the equals (=) operator, and then enter a value of Claire Stevens. Select the action for the rule as Increase the Matching Candidate Score by 20.

The second rule has three conditions. First, choose the work object of Opportunity, choose the attribute name Risk Level, select the equals (=) operator, and then select a value of High. For the second condition, choose the work object of Resource, choose the attribute name Name, select the equals (=) operator, and then enter a value of Claire Stevens. Select the action for the rule as Increase the Matching Candidate Score by 20.

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

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

**Scenario**

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

**Transaction Details**

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

Lead management functionality interfaces with the assignment management features with the work object as lead and candidate object as territory with the assignment type of territory-based assignment. The output of this processing
is a list of territories. Assignment processing then calls the Rule Set Group that contains the rules for the territory-based assignment with rule filtering. While the territory-based assignment delivers a list of territories, the rules can fine tune the assignment process:

1. Rule for SALES CHANNEL Does Not Equal NULL
   a. SalesLead.Sales Channel Does Not Equal NULL
   b. Action: Return matching candidates

2. RULE for SALES CHANNEL Equals NULL, Assign Channel Manager
   a. Sales Lead.Sales Channel Equals NULL
   b. Sales Deal.Deal Size Greater Than 1,000,000
   c. Territory.Territory Type In Partner, Sales Channel Manager
   d. Action: Return matching candidates

3. RULE for SALES CHANNEL Equals NULL, Assign Prime
   a. Sales Lead.Sales Channel Equals NULL
   b. Sales Deal.Deal Size Greater Than 1,000,000
   c. Territory.Territory Type Equals Prime
   d. Action: Return matching candidates

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

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

1. This first rule determines if a sales channel value exists. If it does, then all territories identified (by way of territory-based assignment) are assigned.

2. The second rule says if there is no sales channel assigned, and the deal is under one million dollars, assign the Lead to a Partner and Sales Channel Manager.

3. And the final rule is used when there is no Sales Channel value, and the deal is greater than one million dollars, the lead is assigned to the prime (internal) territories.

Manage Sales Account Assignment

Sales Account Assignment Object: Explained

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

<table>
<thead>
<tr>
<th>Sales Account Assignment Object Attribute</th>
<th>Corresponding Oracle Sales Cloud Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geography ID</td>
<td>Sell-to Address</td>
</tr>
<tr>
<td>Industry</td>
<td>Primary Industry: the primary classification code for the classification category defined in profile option Industry Classification Category.</td>
</tr>
<tr>
<td>Organization Type</td>
<td>Primary Organization Type: the primary classification code for the classification category Organization Type defined in profile option Industry Classification Category.</td>
</tr>
<tr>
<td>Customer Size</td>
<td>Customer Size</td>
</tr>
<tr>
<td>Named Account Type</td>
<td>Named Sales Account Indicator</td>
</tr>
<tr>
<td>Party ID</td>
<td>Party ID</td>
</tr>
<tr>
<td>Auxiliary Dimension 1</td>
<td>the primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 1.</td>
</tr>
<tr>
<td>Auxiliary Dimension 2</td>
<td>the primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 2.</td>
</tr>
<tr>
<td>Auxiliary Dimension 3</td>
<td>the primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 3.</td>
</tr>
</tbody>
</table>

Sales Account Territory Member Access: Explained

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

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

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

Note
Territory Management must be implemented to utilize this feature.

When do territories get assigned to sales accounts?

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

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

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

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

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

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

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

*Note*
Territory Management must be implemented to utilize this feature.

How can I add territories to a sales account?

Oracle Sales Cloud Work Management functionality is used to determine matching territories for a given account. An account can also be assigned to one or more internal and partner territories.

All internal territories, such as Prime, Overlay and Sales Channel Manager territories, which match a given account’s assignment attributes are assigned to the account. Internal territory assignment can be run immediately and automatically whenever account assignment or reassignment is required. For example, you can run the assignment engine when an account is created or updated, or when territories are realigned. Internal territory assignment can also be scheduled to run in a batch, or it can be run on-demand via the Assign Territories action in the account team page.
Partner territories are applicable to Oracle Sales Cloud partner management implementations. When a partner lead is approved, any partner territories associated to the lead are automatically assigned to the lead's account. Channel sales managers can also select specific partner territories to assign to an sales via the Add Partner Territories action in the account team page.

**Note**
Territory Management must be implemented to utilize this feature.

### Manage Opportunity Assignment

#### Opportunity Team Assignment: Explained

Team members (resources) are assigned to an opportunity either automatically by the assignment engine or when you add them to the sales team while editing an opportunity.

**Note**
You must have Full access to an opportunity to use lock assignment, which locks a user's assignment onto the opportunity. This feature can be helpful, for example, when an opportunity owner wants to remain on an opportunity, but still wants the assignment engine to automatically assign other resources to the opportunity.

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

#### Batch Method

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

- **Request Revenue Territory Assignment**: Use this process to invoke territory-based assignment on opportunity revenue lines. During this process, every revenue line in the opportunity batch is evaluated individually. Territories whose dimensions match the dimensional attributes of a given revenue line are then assigned to that line.
  
  Depending on the setting of the profile option, Territory Based Resource Assignment Style, the system will then either add the owners or all members of the assigned territories to the opportunity team.

- **Request Opportunity Resource Assignment**: Use this process to invoke rule-based assignment on an opportunity. During this process, Assignment Manager executes a set of rules, as defined in the profile option, Sales Team Member Assignment Rule Set Group, to find matching candidates for the opportunity. If matching candidates are found, they are added to the opportunity team. Note that team members for whom lock assignment is disabled will be replaced if they no longer match the assignment rules.

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

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

Resource Recommendations

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

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

On-Demand Method

From within an opportunity, sales representatives can use the assign opportunity action to invoke the assignment engine to automatically assign, in real time, resources to the opportunity. Based on the setting of the profile option, Opportunity Assignment Mode, Assignment Manager may invoke territory-based assignment, rule-based assignment, or both.

Saving an Opportunity

If the profile option, Assignment Submission at Save Enabled, is yes, the assignment engine is invoked to assign the entire opportunity upon save. In a similar way that on-demand assignment happens, the assignment engine may invoke territory-based assignment, rule-based assignment, or both, based on the profile option, Opportunity Assignment Mode.

 Territory Proposal Activation

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

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

How do territories get assigned to an opportunity?

You can’t explicitly add territories to an opportunity. Rather, the assignment engine automatically assigns territories to opportunity revenue lines by matching the dimensional attributes of revenue lines to territory dimensions, such as Customer Size or Industry.

To assign territories to an opportunity, administrators can schedule the batch process, Run Revenue Territory Assignment. Or sales users can use the assign
opportunity action from within an opportunity. Note that the profile option, Opportunity Assignment Mode, must be set to run territory-based assignment when using these options. If the profile option, Assignment Submission at Save Enabled, is set to yes, the application may also assign territories to an opportunity every time the record is saved.

**Note**

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

---

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

Administrators can manually assign territories to one or more additional salespeople on a revenue line in order to allow another salesperson working the deal to forecast it in his territory. Manual assignment may be required, for example, to even out a temporary unbalanced load between salespeople reporting to a manager, or even to accommodate a salesperson on extended vacation.

Manual assignment of territories can be performed in the assign sales credit screens or in the details of the revenue line by using the territory picker.

By default, only users with the Sales Administrator job role can perform manual territory assignment on opportunities.

**Which fields in an opportunity drive assignment?**

The following fields drive opportunity assignment: Sales Account, Sales Channel, Product, and Partner (for assigning partner-centric territories). Other, peripheral, sales account and partner attributes also drive assignment, but are not captured or displayed in the opportunity. Examples of these other attributes include: Geography, Named/Not Named, Industry, Organization Type, Partner Type, Customer Size, Account Type, and Classification.

**What’s lock assignment?**

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

**Partner Assignment to Opportunities: Explained**

Much like any other internal resource, partners can be added or removed from the opportunity team manually. However, the resource picker displays only...
partner resources whose partner organization is already associated with the opportunity. The same behavior is applied when choosing a partner resource for credit allocation purposes.

**Partner Opportunity Assignment**

After a partner is added to a revenue line, the next step is to assign matching territories to the revenue line and relevant resources to the opportunity sales team. Partner territories and Partner Program territories (territories of type equal to Partner or Partner Program) are not assigned to opportunities, since they are not used to drive territory forecasting, metrics, or reporting. However, other territories, such as Prime, Overlay, Channel Sales Manager territories, and territories of custom defined types are assigned based on matching dimensional attributes on the revenue line, much like an internal sales opportunity. The treatment of a territory in terms of post-assignment, such as the side effect of adding territory owner or members to the opportunity team, is the same as that of an internal sales territory.

Partner resources cannot be removed from the opportunity team if the resource is receiving nonrevenue credit on a revenue line on the opportunity. To remove the partner, first you must remove the credit allocations he is assigned. When a partner organization is removed from the opportunity and no resource from that partner is receiving credits on the opportunity, all partner resources, if they exist, are automatically removed from the opportunity team.

**Sales Credits and Partners**

Partner resources are only eligible to receive nonrevenue credits on opportunity revenue. When selecting sales credits for partner resources, only partner resources whose partner organization is associated with the revenue line are eligible for sales credits. Partner resources are also not eligible for deal protection.

**Run Sales Assignment Processes**

**Running Opportunity Assignment Process: Points to Consider**

This topic discusses the opportunity assignment batch processes involved in territory-based and rule-based assignment processing, as well as considerations when running the processes.

The two opportunity assignment processes related to assignment are:

- **Revenue Territory Territory Based Assignment Process**: Run this process if you base revenue line item/opportunity assignment on your territory definition (territory-based assignment). The name may appear as RevnTerritoryBatchAssignment in some Oracle Sales Cloud releases.

- **Opportunity Resource Rule Based Assignment Process**: Run this process if you base opportunity assignment on rules that you set up (rule-based assignment).
**Note**

The sales administrator runs the opportunity assignment process from the Scheduled Processes page, available in the navigator.

When setting up the process, you need to enter specific View Criteria Names and their Bind Values. The following sections list the parameters to use and some examples.

**Revenue Territory Territory-Based Assignment Process Parameters**

The following table identifies the view criteria and view criteria bind values available for the opportunity revenue territory territory-based assignment process.

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
</table>
| OpenOpportunities ByCreationDate    | Revenue lines of open opportunities created in the last 90 days. The view criteria bind values do not need to be entered for the default date range, 90 days. The user can pass a different date range by entering view criteria bind values. | • BindOptyCreationDateTo= [date], BindOptyCreationDateFrom= [sysdate-90]  
  • For example:  
    BindOptyCreationDateTo= 2012-02-29,  
    BindOptyCreationDateFrom =2012-01-01  
  • For example:  
    BindOptyCreationDateFrom =2012-01-01 This second example will process all open opportunities created between January 1, 2012, and the current date. |
| OpenOpportunities ByEffectiveDate   | Revenue lines of open opportunities that have an expected close date in the last 90 days. Optionally, the user can enter a different date range. | • BindEffectiveDateFrom = [sysdate],  
  BindEffectiveDateTo = [sysdate [90]  
  • For example:  
    BindEffectiveDateFrom =2012-01-01,  
    BindEffectiveDateTo =2012-02-29 |
| SalesAccountUpdated InLastNDays     | Revenue lines of all open opportunities whose sales account was updated in the last 30 days. Optionally, the user can enter a different number of days. | • BindSalesAccountUpdatedSince = [30]  
  • For example, opportunities whose sales account was updated in last 15 days: BindSalesAccountUpdatedSince=15 |
| OpenOpportunitiesUpdated InLastNDays| Revenue lines of all open opportunities updated in the last 30 days. Optionally, the user can enter a different number of days. | • BindOptyUpdatedSince = [30]  
  • For example, open opportunities updated in last 15 days: BindOptyUpdatedSince=15 |
FilterByBatchTag | Revenue lines of all open opportunities that contain a specific value in the Batch Tag field. | • BindBatchTag = [text]
• For example, open opportunities that have EMEA in the Batch Tag field: BindBatchTag = EMEA

RevenueImportCriteria | Revenue lines of all opportunities imported through the given bulk import batch ID. The view criteria bind value, BatchId, is mandatory. | • BindBatchId
• For example: BindBatchId = 5618782

RevenueBatchReassignment VOCriteria | Revenue lines of all open opportunities associated with at least one of the territories realigned in the territory realignment batch provided. The view criteria bind value, BatchReassignmentBindVar, is mandatory. | • BatchReassignmentBindVar = [Territory Management Batch Identifier]
• For example: BatchReassignmentBindVar = 1728299

ClosedOpportunitiesBy CreationDate | Revenue lines of closed opportunities created in the last 90 days. Optionally, the user can enter a different date range. | • BindOptyCreationDateTo = [date], BindOptyCreationDateFrom = [sysdate - 90]
• For example: BindOptyCreationDateTo = 2012-02-29, BindOptyCreationDateFrom = 2012-01-01

ClosedOpportunitiesBy EffectiveDate | Revenue lines of opportunities closed in the last 90 days. Optionally, the user can enter a different date range. | • BindEffectiveDateFrom = [sysdate], BindEffectiveDateTo = [sysdate + 90]
• For example: BindEffectiveDateFrom = 2012-01-01, BindEffectiveDateTo = 2012-02-29

Note
Opportunity assignment supports a single territory structure. Be careful performing reassignment of closed opportunities, because the single territory structure could cause historic assignments to be overwritten.

Rule-Based Assignment Process Parameters
The following table identifies the view criteria and view criteria bind values available for the opportunity resource rule-based assignment process.

<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
</table>
| OpenOpportunitiesUpdated InLastNDays | All open opportunities which were updated in the last 30 days. Optionally, the user can enter a different number of days. | • BindOptyUpdatedSince = [30]
• For example, opportunities updated in last 15 days: BindOptyUpdatedSince = 15 |
| OpportunityForImport BatchVO | All opportunities imported through the given bulk import batch ID. Value for BatchId is mandatory. | • BindBatchId  
• For example: BindBatchId=5618782 |
|-------------------------------|-------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------|
| OpenOpportunities ByCreationDate | Open Opportunities created in the last 90 days. Optionally, the user can pass a different date range. | • BindOptyCreationDateTo [sysdate], BindOptyCreationDateFrom [sysdate-90]  
• For example:  
  BindOptyCreationDateTo=2012-02-29, BindOptyCreationDateFrom=2012-01-01 or  
  BindOptyCreationDateFrom=2012-01-01 This second example will process all open Opportunities that were created between January 1, 2012 and the current date. |
| OpenOpportunities ByEffectiveDate | Open opportunities that have an expected close date in the last 90 days. Optionally, the user can pass a different date range. | • BindEffectiveDateFrom [sysdate], BindEffectiveDateTo [sysdate-90]  
• For example: BindEffectiveDateFrom=2012-01-01, BindEffectiveDateTo=2012-02-29 |
| SalesAccountUpdated InLastNDays | All open opportunities whose sales account got updated in the last 30 days. Optionally, the user can pass a different number of days. | • BindSalesAccountUpdatedSince [30]  
• For example, opportunities whose sales account was updated in last 15 days: BindSalesAccountUpdatedSince=15 |
| ClosedOpportunities ByEffectiveDate | Opportunities closed in the last 90 days. Optionally, the user can pass a different date range. | • BindEffectiveDateFrom [sysdate], BindEffectiveDateTo [sysdate-90]  
• For example: BindEffectiveDateFrom=2012-01-01, BindEffectiveDateTo=2012-02-29 |
| ClosedOpportunities ByCreationDate | Closed opportunities created in the last 90 days. Optionally, the user can pass a different date range. | • BindOptyCreationDateTo [sysdate], BindOptyCreationDateFrom [sysdate-90]  
• For example: BindEffectiveDateFrom=2012-01-01, BindEffectiveDateTo=2012-02-29 |

**Note**
Opportunity assignment supports a single territory structure. Be careful performing reassignment of closed opportunities, because the single territory structure could cause historic assignments to be overwritten.

**Opportunity Assignment Implementation Considerations**
Implemenors should be aware of the following when scheduling opportunity batch assignment processes:

- Multiple Revenue Territory Territory Based Assignment and Opportunity Resource Rule Based Assignment processes cannot run at the same time. If one of the processes is running and the user submits another process (either Revenue Territory Territory Based Assignment or Opportunity Resource Rule Based Assignment), then the second process have a Paused status until the first job completes. Once the first process completes, the second process will start.
- For date-based view criteria, for example, OpenOpportunitiesByEffectiveDate, the view criteria bind values do not need to be entered if the default date range is used.
- For number-of-days-based view criteria, for example, OpenOpportunitiesUpdatedInLastNDays, the view criteria bind values do not need to be entered if the default number of days is used.
- When entering view criteria bind values the date format is YYYY-MM-DD.
- When scheduling opportunity batch assignment processes for the first time, if a process errors, you can try re-scheduling the process and enter a lower value for the Maximum Sub Processes per Process parameter. The default value is 10. This ensures that each batch contains a small number of opportunities or revenue lines. If there is an issue with one of the opportunities or revenue lines, then the appropriate subprocess will an error status and the other subprocesses will complete successfully.

**Scheduling Sales Account Assignment: Explained**

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

To access the Scheduled Process page, click **Navigator**. Under the **Tools** heading, click **Scheduled Processes**.

1. Click **Schedule New Process** then click type **Job**. Choose the process named **SalesAccountBatchAssignRequest**. If needed, use the Search link at the bottom of the Search window.

2. Enter your process details. The following table shows the view criteria and its description, as well as any bind values that are required.
   - **Work Object code**: SalesAccount_Work_Object
   - **Candidate Object Code**: SalesAccountTerritory_Candidate_Object
   - **Assignment Mode**: Territory
   - **View Criteria Name**: (see table below)
   - **View Criteria Bind Values**: (see table below)
<table>
<thead>
<tr>
<th>View Criteria Name</th>
<th>View Criteria Description</th>
<th>View Criteria Bind Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>SalesAccountsUpdatedSinceVC</td>
<td>Use this view criteria to assign sales accounts which have not been previously assigned and have LAST_UPDATE_DATE (in the ZCA_SALES_ACCOUNTS table) greater than the specified date. For newly created accounts, LAST_UPDATE_DATE is the same as the creation date.</td>
<td>BindLastUpdateDate= [YYYY-MM-DD HH:MM:SS]</td>
</tr>
<tr>
<td>SalesAccountsAssignedBeforeVC</td>
<td>Use this view criteria to reassign accounts which have been previously assigned and have LAST_ASSIGNED_DATE (in the ZCA_SALES_ACCOUNTS table) less than the specified date.</td>
<td>BindLastAssignedDate= [YYYY-MM-DD]</td>
</tr>
<tr>
<td>SalesAccountTerritoryBatchReassignmentVC</td>
<td>Use this view criteria to reassign accounts impacted by the specified territory and territory dimensional realignment batch. This view criteria is also used internally to invoke immediate/automatic assignments after territory proposal activation and territory dimension updates.</td>
<td>BindReassignmentBatchId=[Territory Reassignment Batch ID]</td>
</tr>
<tr>
<td>SalesAccountBulkImportVC</td>
<td>Use this view criteria to assign accounts created in a given customer import batch. This view criteria is also used internally to invoke immediate/automatic assignments after customer import.</td>
<td>BindReassignmentBatchId=[Import Activity ID]</td>
</tr>
<tr>
<td>SalesAccountDimsForPartyVC</td>
<td>Use this view criteria to assign the account with the specified sales account ID.</td>
<td>BindPartyId= [Sales Account ID]</td>
</tr>
</tbody>
</table>
3. Define a schedule as needed using the Advanced button on the Process Details page. You can schedule the process to run as soon as possible, or to run at a given frequency and start date.

4. Submit your job and monitor it using the Scheduled Processes list, refreshing it to view the latest status updates.

**Candidate Refresh: Explained**

Assignment requests that are rule-based and that identify matching candidates or scores for matching candidates use candidate data. Candidate data, such as resources, are loaded into a cache and used for each assignment request until the cache is refreshed. The candidate data cache can be refreshed at regular intervals using the Refresh Cache process scheduled in the Enterprise Scheduling Service (ESS). You can set the **Refresh Cache** process to refresh candidate data each time there is an assignment request using that candidate.

**Note**

This feature affects rule-based assignment using the rule set types of matching candidates or matching candidates with scoring only.

Implementations may schedule this process daily, weekly, and so on, as required by the frequency of changes to the candidates. Consider how often the candidate data will change and how critical it is to have the changes available for use in assignment. For example, resource details may change daily and therefore the resource candidate data cache for managing leads may need to be updated once per day.

The **Refresh Cache** process should be defined for each candidate object and application that uses Rules-based Assignment candidate matching or candidate matching with scores. The process has the following parameters:

- Candidate Object Code, for example `Resource_Candidate_Object`.
- Owner Module, such as `sales` or `leadMgmt`. For example, there would be one ESS process scheduled for managing leads with the parameter `Resource_Candidate_Object_Lead/leadMgmt`. Sales would need a process scheduled with the parameter `Resource_Candidate_Object/sales`.

**Run Sales Assignment Reports**

**Generating Assignment Reports: Example**

Assignment management functionality allows you to generate the following reports to view batch assignment progress and errors, and to show the sequencing of territory dimensions:

- Batch Assignment Progress Report
- Batch Assignment Error Report
- Territory Dimension Data Report

You must access the Diagnostic Dashboard to run and generate these reports. This topic explains how to run and generate batch assignment progress report, as an example.
Scenario

To generate the batch assignment progress report:

1. Log in as a user who has access to the Diagnostic Dashboard.
2. Click Navigator, and then click Scheduled Processes under Tools.
3. Run batch assignment processes for Sales Accounts and Opportunities.
   While the process is running, navigate to the Diagnostic Dashboard to run the batch assignment progress report.
4. Click the Help link.
5. Click Troubleshooting, and then click Run Diagnostics Tests.
6. On the Diagnostic Dashboard page, search for the report name you want to run. In this example, select Batch Assignment Progress Report.
7. Select Batch Assignment Progress Report and click Add to Run.
   Batch Assignment Progress Report is added under the Choose Tests to Run and Supply Inputs region.
8. Click the warning icon under the Input Status column, and enter the parameters in the Input Parameters page that appears.
9. Click OK.
10. Under the Choose Tests to Run and Supply Inputs region, enter a name in the Run Name field and click Run.
11. In the Confirmation dialog box, click OK.
    The status of the report appears under the Diagnostic Test Run Status region.
12. Click the completed report to open the report page.

You can now use the report for your analysis. You can follow the same procedure to generate all reports.

Batch Assignment Progress Report: Explained

The batch assignment progress report indicates the number of records processed, unprocessed, successful or failed, and the number of records processed per minute for a process. The report provides details of assignment processing for multiple batch assignment processes and their sub-processes. You can run this report while a batch assignment process (sales accounts, leads, opportunities, revenues, or partner accounts) is running, or after a process has completed.

Access the Diagnostic Dashboard to generate the batch assignment progress report. The report includes two tables, one with details of the main process, followed by details of the sub-processes. The second table with sub-processes appears only if the Include Sub Process parameter is set to True.

Input Parameters

The report has the following input parameters:
### Input Parameter

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Process ID</td>
<td>The identifiers of parent ESS processes.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>You can enter multiple process IDs.</td>
</tr>
<tr>
<td>From Date</td>
<td>Select the start date.</td>
</tr>
<tr>
<td>To Date</td>
<td>Select the end date.</td>
</tr>
<tr>
<td>Include Sub Processes</td>
<td>Select <strong>True</strong> to include sub-processes. The default value is <strong>False</strong>.</td>
</tr>
</tbody>
</table>

### Example Report

The table below shows an example of a batch assignment progress report along with a description of what each value means:

<table>
<thead>
<tr>
<th>Column</th>
<th>Sample Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Process ID</td>
<td>504</td>
<td>Identifier for the ESS process</td>
</tr>
<tr>
<td>Work Object Code</td>
<td>SalesAccount_Work_Object</td>
<td>The code for the work object</td>
</tr>
<tr>
<td>Candidate Object Code</td>
<td>SalesAccountTerritory_Candidate_Object</td>
<td>The code for the candidate object</td>
</tr>
<tr>
<td>Submitted By</td>
<td>Sales_admin</td>
<td>Submitted By - user name of the person submitting the process</td>
</tr>
<tr>
<td>Process Status</td>
<td>Running</td>
<td>The status of the process, such as, Not Started, In Progress, Cancelled, and so on</td>
</tr>
<tr>
<td>Process Start Time</td>
<td>11/19/12 8:48 PM UTC</td>
<td>Start Time of the process. Shows date, hours, and minutes</td>
</tr>
<tr>
<td>Process End Time</td>
<td></td>
<td>End Time of the process. Shows date, hours, and minutes</td>
</tr>
<tr>
<td>Process Elapsed Time (Minutes)</td>
<td>22</td>
<td>Number of minutes the process has been running</td>
</tr>
<tr>
<td>Records per Minute</td>
<td>10.46</td>
<td>Number of records processed per minute</td>
</tr>
<tr>
<td>Number of Sub Processes</td>
<td>10</td>
<td>The number of sub processes launched from the parent process</td>
</tr>
<tr>
<td>Number of Records</td>
<td>100000</td>
<td>Number of records in the process</td>
</tr>
<tr>
<td>Number Not Processed</td>
<td>94452</td>
<td>Number of records not yet processed</td>
</tr>
<tr>
<td>Number Successful</td>
<td>5542</td>
<td>Number of records successfully processed</td>
</tr>
<tr>
<td>Number Failed</td>
<td>6</td>
<td>Number of records failed</td>
</tr>
<tr>
<td>Failure Rate</td>
<td>0.00006</td>
<td>Number of failures divided by the Number of Items</td>
</tr>
<tr>
<td>Assignment Elapsed Time</td>
<td>21.45</td>
<td>Number of minutes the assignment processing has been running</td>
</tr>
<tr>
<td>Records Processed Last 10 Minutes</td>
<td>12.63</td>
<td>Number of records processed in the previous 10 minutes</td>
</tr>
</tbody>
</table>
The report can be used to estimate the time it will take to complete a batch assignment process. This report provides details on the number of records completed and the number of records in progress. You can generate this report repeatedly to conduct performance analysis of the batch assignment processing.

**Batch Assignment Error Report: Explained**

The batch assignment error report provides details of the error and warning messages generated while processing individual records during batch assignment process. The report provides a summary of the test input parameters and message details for each record that meets the input parameters. You can run this report while a batch assignment process (sales accounts, leads, opportunities, revenues, or partner accounts) is running, or after a process has completed.

Access the Diagnostic Dashboard to generate the batch assignment error report. The report shows the test parameters followed by two results table. The first table provides a summary of the process, and the second table shows details of the records that meet the criteria entered when running the report.

**Report Parameters**

The report has the following input parameters:

<table>
<thead>
<tr>
<th>Input Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent Process ID</td>
<td>Identifier for the parent ESS process.</td>
</tr>
<tr>
<td></td>
<td><strong>Note</strong></td>
</tr>
<tr>
<td></td>
<td>You can enter only a single process ID.</td>
</tr>
<tr>
<td>Assignment Status</td>
<td>Enter the status of the assignment, such as, error, succeeded, and so on.</td>
</tr>
<tr>
<td></td>
<td>The default is error.</td>
</tr>
<tr>
<td>Work Object Public Unique Identifier</td>
<td>This is optional. The value that you enter here will depend on the Identifier Attribute of the work object being processed in a batch.</td>
</tr>
<tr>
<td>Range of Records</td>
<td>Enter the range of records in a process to report. The default value is the value set in the MOW_DTF_ERROR_REPORT_MAX_LIMIT profile option.</td>
</tr>
<tr>
<td></td>
<td>You can change this profile option value in the Manage Administrator Profile Values setup task.</td>
</tr>
</tbody>
</table>

**Example Report**

The following is an example of a batch assignment error report:

**Process Summary**

<table>
<thead>
<tr>
<th>Work Object Code</th>
<th>Candidate Object Code</th>
<th>Start Time</th>
<th>End Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>SalesAccount_Work.Obj</td>
<td>SalesAccountTerritory_Ca</td>
<td>2013/2/11 12:13</td>
<td>2013/2/11 02:45</td>
</tr>
</tbody>
</table>
Process Details

<table>
<thead>
<tr>
<th>Work Object Public Unique Identifier</th>
<th>Assignment Status</th>
<th>Message Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>1243213</td>
<td>Successful</td>
<td>225030 MOW_AMENG_AO_ASSERT_ASSERTED FAILED An error occurred while loading assignment object Sales_Account_Work_object. There is a mismatch between the view object definition in the assignment configuration and the actual view object definition used during assignment processing. Update and save the assignment object to register it with the latest view object definition.</td>
</tr>
<tr>
<td>1728224</td>
<td>Error</td>
<td></td>
</tr>
<tr>
<td>1982663</td>
<td>Successful</td>
<td></td>
</tr>
<tr>
<td>2392053</td>
<td>Successful</td>
<td></td>
</tr>
</tbody>
</table>

The report provides details for implementation to understand if there were errors in the batch assignment being run. This report can also be used to indicate if a particular work object record was processed in a batch assignment process.

Running Batch Assignment in Diagnostic Mode: Example

You can run your batch assignment in diagnostic mode so that you can view the details of the assignment processing in an output log. This topic provides an example of running lead batch assignment in diagnostic mode.

A profile option called MOW_DIAG_MODE_WO_LIMIT defines the number of work objects that are allowed to be processed in diagnostic mode. The default setting is 1, and you can change the setting before you run batch assignment.

Note

For revenue lines which are grouped by opportunity, the MOW_DIAG_MODE_WO_LIMIT value indicates the number of opportunities. For example, the default setting would mean one opportunity which can contain more than one revenue line.

Scenario

A sales representative of a company has to follow up on a lead but the lead has not been assigned to his territory. He has requested you, the sales administrator, to investigate the details of territory assignment. You can provide these details by running lead batch assignment in diagnostic mode.

1. Log in to the application and select the Navigator menu, and then select the Lead Qualification menu item.
2. Select Lead Processing Activities under the Tasks pane.
3. On the Lead Processing Activity page, click the Create Lead Processing Activity button.
4. On the Create Lead Processing Activity page:
   a. Select **Assignment** from the **Process Type** list.
   b. Enable diagnostic mode by checking the **Diagnostic Mode** check box.
   c. Search and select a lead. Note down the lead number value to use in a later step.
   d. Select **Immediate** from the **Schedule** list.
   e. Click **Submit**.

5. In the Confirmation dialog box, click **OK**.

6. Click the Refresh icon till the process has completed successfully or with an error.

7. Click the Output log icon in the View Log column to view details.

Open the log file in another browser window or tab.

**Note**
The log file format is designed to be viewed in a browser application. If the log file is opened in another application, such as Notepad, the format may not be optimal and the log may be difficult to read.

View the log for details of the assignment processing for the selected lead. You can use the lead number noted down earlier to search in the log file. Review the log for details of the assignment processing.

**Batch Assignment Diagnostic Log: Explained**

When you run batch assignment in diagnostic mode, an output log is generated with details of the assignment processing. You can use these details to troubleshoot any issues with territory assignment. The log helps you understand why certain leads or opportunities were not assigned to your territories as expected.

The table below provides an example of a lead batch assignment diagnostic log along with an explanation of each section of the log.

**Note**
Use the search feature in your log file to search on keywords, such as the error message number, for example 225203, to locate a specific section.

<table>
<thead>
<tr>
<th>Example Log File Entries</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment processing is in diagnostic mode. Assignment results will not be stored and the first 1 work objects will be processed. (MOW-225203)</td>
<td>Provides a summary of the assignment processing and the number of work objects to be processed.</td>
</tr>
</tbody>
</table>

**Note**
You can change the number of work objects allowed to be processed in diagnostic mode via the MOW_DIAG_MODE_WO_LIMIT profile option. The default setting is 1.
Process 123 submitted at 2013/2/19 12:10
started assignment processing of 1 work objects.
(MOW-225172)

| Work Object = Lead_Work_Object_Lead |
| Candidate Object = Territory_Candidate_Object_Lead |
| Assignment Mode = Territory |
| View Criteria = LeadAssignmentDiagnosticVC |
| View Criteria Bind Values = BindLeadNumberDiag=LEAD_1527 |
| Rule Set Group Id = 12221 |
| Rule Set Group Name = |
| Grouping Attribute = |
| Replace Team = True? |
| Number of Work Objects per Sub Process = 1000 |
| Maximum Sub Processes per Process = 10 |
| Metric Logging Interval = 100 |
| Custom Data = |
| Diagnostic Mode = true |

Matching request for work object
Lead_Work_Object_Lead with the
identifier Lead_1527 and candidate object
Territory_Candidate_Object_Lead is in process.
(MOW-225169)

| Geography Identifier = 1272833, Sell to Address = 500 Oracle Pkwy, Redwood Shores, CA 94065 USA |
| Party Identifier =12393333, Sales Account Number = 52733 |
| Customer Size Code = MEDIUM |
| Industry = null |
| Named Account Type = N |
| Organization Type = null |
| Inventory Item = 17182823, Product = Green Server |
| Product Group = null |
| AuxiliaryDimension1 = null |
| Partner Identifier = null, Registry Identifier = null |
| Score = 13212 Etc. |

Allows you to confirm the objects being processed in this batch, for example territories being assigned to leads, the type of assignment processing, and the other parameters and their values relevant for this batch process. Indicates the following:

- The process has started.
- Work object being processed and the candidates being found.
- Type of assignment processing:
  - Territory = territory assignment
  - Matching = assignment using rules
  - Score = scoring
  - Classification = ranking or qualification
- View criteria and bind value in leads which determine the set of leads that are included in this batch assignment process.
- Diagnostic mode setting.

Provides a summary of the active assignment attributes and their values that will be used in the processing of this lead.

**Note**

Only a subset of these attributes may be used in the assignment processing of a lead, for example lead ranking rule may only use the score and timeframe attributes.

- Values for the work object.
- Attributes that are null.
- Products available: In the example, there is one product, green server.

Use this information to confirm the data values for the work object that may be used in the assignment processing.
Assignment matching using mapping set Mapping Set 1 is in process. (MOW-225185)

Assignment mapping values were retrieved. (MOW-225211)

Function Code = Geo, GeographyId = 182939393, Sell to Address = 500 Oracle Pkwy, Redwood Shores, CA 94065 USA

Function Code = Acct, PartyId =1232222293333
Function Code = CustSze, CustomerSize =
Function Code = Acct, PartyId =1232222293333
Function Code = Prod, Inventory Item Identifier = 12222, Product = Green Server, Inventory Org Id = 15161717
Partner Identifier = Partner Program Identifier = 17832833

Assignment mapping values were retrieved. (MOW-225212)

Function Code = Geo, Sequence = 1 -1
Function Code = Acct, Sequence = 12223 - 333334, 523712-728299
Function Code = CSize, Sequence = 233 - 27389
Function Code = AcTyp, Sequence = 211 - 211
Function Code = OrgTp, Sequence = 3643 - 3833
Function Code = Indst, Sequence = 233 - 811
Function Code = Prod, Sequence 1221 - 3783

This shows the active assignment mappings that drive territory-based assignment for this lead. The value(s) for each mapping is also shown.

If an unexpected territory or set of territories has previously been assigned to the work object, then confirm that this is the information you expected to be used for this lead.

Assignment mapping values were translated to sequence values. (MOW-225212)

Function Code = Geo, Sequence = 1 -1
Function Code = Acct, Sequence = 12223 - 333334, 523712-728299
Function Code = CSize, Sequence = 233 - 27389
Function Code = AcTyp, Sequence = 211 - 211
Function Code = OrgTp, Sequence = 3643 - 3833
Function Code = Indst, Sequence = 233 - 811
Function Code = Prod, Sequence 1221 - 3783

This section is relevant for Oracle Support to troubleshoot assignment issues.

Candidate matches were identified. Post processing is in progress. (MOW-225210)

Territory with the Number 282274 was dropped as it is a parent. (MOW-225209)
Territory with the Number 282312 was dropped due to an exclusion. (MOW-225208)
Territory with the Number 238424 was dropped due to an exclusion. (MOW-225208)
Territory with the Number 120238 was dropped as it is a parent. (MOW-225209)

Indicates that matching candidates were found and lists the matching candidates that were dropped since they are either parent candidates or part of excluded territories.

If this lead was assigned previously and the territory you expected was not assigned, then review this list of dropped territories. The territory might have been dropped because it was a parent territory and a lower level territory under this also matched. Alternatively, this territory might have been excluded for this lead (for example, a partner might have rejected this lead) or the territory might have an exclusion coverage that contains the account on this lead.
The final matching candidates for mapping set Sales Account Mapping Set were identified. (MOW-225207)

<table>
<thead>
<tr>
<th>TerritoryNumber</th>
</tr>
</thead>
<tbody>
<tr>
<td>284844</td>
</tr>
<tr>
<td>284554</td>
</tr>
<tr>
<td>281274</td>
</tr>
<tr>
<td>161238</td>
</tr>
<tr>
<td>210372</td>
</tr>
</tbody>
</table>

Shows the final list of matching territories.

Assignment matching using mapping set Mapping Set 2 is in process. (MOW-225185)
The mapping set Mapping Set 2 was skipped as the conditional attribute PartnerId is blank. (MOW-225206)

Shows the progress of assignment matching for a mapping set.

In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 2) has a conditional attribute defined. For this lead, this attribute does not contain a value, and so the territory matching for this mapping set is not needed and therefore not performed.

Assignment matching using mapping set Mapping Set 3 is in process. (MOW-225185)
The mapping set Mapping Set 3 was skipped as the conditional attribute ProspectAcctId is blank. (MOW-225206)

Shows the progress of assignment matching for a mapping set.

In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 3) has a conditional attribute defined. For this lead, this attribute does not contain a value, and so the territory matching for this mapping set is not needed and therefore not performed.
Assignment of 4 Territory_Candidate_Object_Lead candidates to work object Lead_Work_Object_Lead with the identifier Lead_1527 is in process. (MOW-225167)

The existing candidates were identified. (MOW-225200)

TerritoryNumber = 1628299
TerritoryNumber = 1019131

Assigned 4 new Territory_Candidate_Object_Lead candidates to work object Lead_Work_Object_Lead with the identifier Lead_1527. (MOW-225180)

TerritoryNumber = 327211
TerritoryNumber = 210372
TerritoryNumber = 282274
TerritoryNumber = 284554

Removed 2 Territory_Candidate_Object_Lead candidates to work object Lead_Work_Object_Lead with the identifier Lead_1527. (MOW-225181)

TerritoryNumber = 1628299
TerritoryNumber = 1019131

Assignment of 4 Territory_Candidate_Object_Lead candidates to work object Lead_Work_Object_Lead is complete. (MOW-225166)

Details of assignment of territories to work objects that are in process, added, or removed. Provides the list of existing territories previously assigned to this lead, identifies the new territories that will be assigned, and provides the list of territories that will be removed from this lead.

Indicates that assignment processing is complete.

1 out of 1 work objects were completed. 1 work objects successfully processed. 0 work objects failed. (MOW-225127)

Provides summary of how many work objects were successfully processed and how many failed.

**Purge Batch Assignment Information: Explained**

When a batch assignment job runs, it creates data that helps with the assignment process. Once the job is completed, this data is no longer required and can be purged. Assignment management functionality enables implementations to purge data. The Enterprise Scheduling Service (ESS) process **Purge Batch Assignment Information** is used to purge the batch assignment tables based on set parameters. A batch assignment process creates data in two tables MOW_BATCH_ASGN_JOBS and MOW_BATCH_ASGN_JOB_ITEMS. When the size of the batch assignment process is huge, it creates a large number of rows in the MOW_BATCH_ASGN_JOB_ITEMS table. With time, records in these tables grow substantially, especially with large implementations. The purge batch assignment information process helps in clearing old records for successfully completed processes. The process purges data for batch assignment processes for leads, opportunities, sales accounts and so on.

Implementations may run this process periodically or on an ad-hoc basis. The process has only one parameter **Days to Keep**. The default value is 30.
Specify the number of days worth of assignment batch job and data to keep until the next purge. For example, if you set the parameter to 15 and run the purge batch assignment information process, the process removes all rows related to successfully completed processes in the batch assignment data table that were created before 15 days from the current date.

**Territory Dimension Data Report: Explained**

The territory dimension data report identifies the volume of territory data for each territory dimension and coverage type. You can use information from this report to determine the sequence for each assignment mapping and optimize assignment performance. You must run this report only after you have created and activated your production territories.

Access the Diagnostic Dashboard to generate the territory dimension data report. The report contains one table that shows the number of de-normalized customer account-centric and partner-centric territory records for each territory dimension and coverage type.

The table below shows an example of a territory dimension data report:

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Count for INCLUSION</th>
<th>Count for EXCLUSION</th>
<th>Count for PARTNER_REGULAR</th>
<th>Count for REGULAR</th>
</tr>
</thead>
<tbody>
<tr>
<td>AcTyp</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>305</td>
</tr>
<tr>
<td>Acct</td>
<td>0</td>
<td>0</td>
<td>16</td>
<td>313</td>
</tr>
<tr>
<td>Aux1</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
</tr>
<tr>
<td>Aux2</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
</tr>
<tr>
<td>Aux3</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
</tr>
<tr>
<td>CSize</td>
<td>7</td>
<td>3</td>
<td>13</td>
<td>336</td>
</tr>
<tr>
<td>Geo</td>
<td>7</td>
<td>3</td>
<td>2</td>
<td>4</td>
</tr>
<tr>
<td>Indst</td>
<td>7</td>
<td>3</td>
<td>14</td>
<td>268</td>
</tr>
<tr>
<td>OrgTp</td>
<td>7</td>
<td>3</td>
<td>14</td>
<td>374</td>
</tr>
<tr>
<td>Prod</td>
<td>2</td>
<td>3</td>
<td>16</td>
<td>171</td>
</tr>
<tr>
<td>Prtnr</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
</tr>
<tr>
<td>Schnl</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>259</td>
</tr>
</tbody>
</table>

Once the report is generated, you must identify the sequence of mappings as follows:

1. Copy the report over to an excel spreadsheet.
2. Sum up the count for inclusion, exclusion, partner_regular, and regular for each function code.
3. List the function codes in order from lowest total count to highest.

After you list function codes from lowest count to the highest, the report table should look like the following:

<table>
<thead>
<tr>
<th>Function Code</th>
<th>Count for INCLUSION</th>
<th>Count for EXCLUSION</th>
<th>Count for PARTNER_REG</th>
<th>Count for REGULAR</th>
<th>Total Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>Geo</td>
<td>7</td>
<td>3</td>
<td>2</td>
<td>4</td>
<td>16</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>3</td>
<td>16</td>
<td>171</td>
<td>192</td>
</tr>
<tr>
<td>-------</td>
<td>-----</td>
<td>-----</td>
<td>-----</td>
<td>------</td>
<td>------</td>
</tr>
<tr>
<td>Prod</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>259</td>
<td>285</td>
</tr>
<tr>
<td>Schnl</td>
<td>7</td>
<td>3</td>
<td>14</td>
<td>268</td>
<td>292</td>
</tr>
<tr>
<td>Indst</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>313</td>
<td>329</td>
</tr>
<tr>
<td>Acct</td>
<td>0</td>
<td>0</td>
<td>16</td>
<td>305</td>
<td>331</td>
</tr>
<tr>
<td>AcTyp</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>336</td>
<td>359</td>
</tr>
<tr>
<td>CSize</td>
<td>7</td>
<td>3</td>
<td>13</td>
<td>374</td>
<td>398</td>
</tr>
<tr>
<td>OrgTp</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
<td>411</td>
</tr>
<tr>
<td>Aux1</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
<td>411</td>
</tr>
<tr>
<td>Aux2</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
<td>411</td>
</tr>
<tr>
<td>Aux3</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
<td>411</td>
</tr>
<tr>
<td>Prtnr</td>
<td>7</td>
<td>3</td>
<td>16</td>
<td>385</td>
<td>411</td>
</tr>
</tbody>
</table>

With this information, you can now update the sequence for each assignment mapping. The function code with the lowest total count, Geo in this example, should be updated to have the sequence 1. The next lowest total count, Prod in this example, should have sequence 2, and so on. You must update the sequence similarly for every mapping in each mapping set, for every work-object and candidate-object combination.
Manage Sales Territories

Territory Management Features: Overview

Sales territories form the fundamental infrastructure of sales management because territories define the jurisdiction that salespeople have over sales accounts, or the jurisdiction that channel sales managers have over partners and partner transactions.

Territories provide the rules for automatically assigning salespeople and other resources to sales accounts, partners, leads, and opportunity line items. The structural hierarchy of territories defines resource responsibilities and controls access to customer and sales data.

Summary of Features

The key features of Territory Management include the following:

- Territories serve as a basis for forecasting, quota distribution, compensation, and analysis of sales performance. Forecasts roll up according to the territory hierarchy.
- Use territories to assign resources and secure access to sales accounts, leads, and opportunities.
- Channel sales managers are assigned to partners and partner transactions within their territories.
- Define territories by logical boundaries called dimensions. Examples of these include geography, industry, product, customer size, sales channel, and organization type.
- Define territories by selecting a list of specific customers or partners.
- Model territory realignments and perform what-if analyses to find optimal territory changes.
- Analyze metrics to understand the results of changes to the boundaries of each territory. View gap and overlap reports to see whether there are any undesired results.
- Use assignment preview to double-check that each territory is getting the right accounts.

Territory Components: How They Work Together

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

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

Territories

A territory, whether active or part of a territory proposal, includes several elements. One or more dimensions, such as geography, define the boundaries of a territory according to selected dimension members, such as Europe or Asia. Every territory is assigned an owner and can have additional territory team members.

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

Model your territories to support your sales goals, such as the introduction of a new product, in addition to providing salespeople equitable territories to support their productivity. One salesperson can belong to multiple territories.

Sales Resource Structure

You can model territories as hierarchies that are similar to the sales resource hierarchy. For example, the sales manager owns the parent territory and the salespeople who report to the manager own child territories.

Multiple Sales organizations

A higher level sales executive owns a parent territory with several child territories owned by senior managers. Each senior manager has a sales organization that focuses on selling to support a particular sales goal.

For example, one senior manager is at the top of a hierarchy of territories that are defined by geography. Another senior manager owns a territory hierarchy and sales organization who sell only to government customers. A third territory hierarchy supports selling the new product line to any customer with interest in the product. The fourth territory hierarchy assigns salespeople to specific important customers. Some of the senior managers create a child territory hierarchy to oversee partners.

Forecasts and Quotas

When you model your territories, you also want to think about how you want to manage your forecasts and quotas. Quotas are set and distributed from the top of the single overall territory hierarchy down through the levels of territories. A manager owner of the parent territory sets the quotas for the child territories and their owners.

Forecasts roll up the territory hierarchy. What forecasts, pipeline, and closed sales do executives want to monitor? Do they want to see how a new product line is doing? Watch over a country where you just started selling? Compare different industries? You can model your territory hierarchy to support your forecasting and sales analysis needs.

Sales Goals

You can model territories to support specific sales goals.

Products

You can delegate a sales team to selling a particular product. Perhaps you have a group of products that requires specific technical expertise to sell it. Or you want to provide incentives to sell a new product line. Leads and opportunity line items that include a product will be automatically assigned to the territory defined for the product or a parent of the product in the sales catalog.
New Customers

Your sales analysts identified opportunities for finding new customers. You can model territories to support your sales goal to expand your customer base. Perhaps the analysts identified certain industries to be good prospects. You can define territories partly by the industry, and assign a sales team dedicated to pursuing customers in that industry.

You open a new geographic area. Territories not only take care of assigning customers, leads, and opportunities to the salespeople in that region, but also provide the structure for monitoring and analyzing the sales forecasts and results for the new region.

Security and Access

You control access to customers, leads, and opportunities partly with your territory structure.

Salespeople have access to customers, leads, and opportunities that fall within their territories. Salespeople assigned to the parent territory also have access to child territories and on down the hierarchy. To find other topics about security and access, search for customers, leads, opportunities, assignment, and security.

Territories Defined by Dimensions: Explained

Dimensions define territory boundaries. For example, the geography dimension can be used to define territories by specified countries, cities, and postal codes. Territory dimensions are used to assign customer accounts, partners, leads, and opportunity line items to the correct territories.

A territory captures every sales account or partner that falls within the defined boundaries of the territory.

Here is a geography example. The sales team assigned to this territory is responsible for all customers in Spain. In this example, the Spain Territory is assigned sales accounts for Customer A, but not Customer B.

Customers and Partners

The dimensions used to assign sales accounts or partners to a territory are:

- Customer
Use the Included Customers region of the Coverages tab to select individual customers, with or without the customer hierarchy. The selected customer’s sales accounts will be assigned to the territory. You can also select customers to be excluded from the territory.

Alternatively, use the Customer dimension in the Dimensional Coverage region to select either customers that are large enough to have a customer hierarchy in Account Center, or customers with at least one sales account with Named Account selected.

- Geography
- Account Type
  Was the sales account designated a named account or not?
- Customer Size
- Industry
- Organization Type
- Partner

Use the Included Partners region of the Coverages tab to select individual partners to be included in the territory. You can also select partners to be excluded from the territory.

Your administrator can also use classification categories to define up to three additional dimensions based on classifications to assign customers or partners.

**Leads and Opportunities**

A territory captures specific leads or deals that are for customers or partners assigned to the territory. Additionally, you can define a territory using information about that deal.

Your territory does not have to be defined using customer information. It can capture all leads and opportunity line items that match dimension definitions. Or you can create a territory with customer boundaries in addition to defining what can be sold to assigned customers.

The additional dimensions used to assign leads and opportunity line items are:

- **Product**
  Groups of products form a hierarchy in the sales catalog.
- **Sales Channel**
  The available sales channels are Direct, Indirect, and Partner.

For example, your company is launching a new product line. One sales manager with a small sales team will specialize in selling only the new line. The sales manager’s territory is defined only by the new product.
One of the salespeople reporting to this manager sells the new product line in Canada. The following figure shows the salesperson's territory and an opportunity line item assigned to the territory:

<table>
<thead>
<tr>
<th>Territory Proposals: Explained</th>
</tr>
</thead>
</table>

Territories are used to assign territory teams to leads, opportunity revenue items, and sales accounts. A territory proposal is a container used to model territory changes without affecting the active territories. Sales executives, sales administrators, and managers use territory proposals to model different ways to partition their territories and view the results until they are satisfied with a model. They then activate the preferred territory proposals.

**Note**

You use a territory proposal for any and all changes to territories, for example, changing the owner of one territory.

**Typical Territory Proposal Workflow**

Use the following typical workflow for territory proposals:

<table>
<thead>
<tr>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create a proposal</td>
<td>Create the proposal and set an activation date.</td>
</tr>
<tr>
<td>Add a territory to the proposal</td>
<td>Add an existing territory to the proposal, or create a new territory. Repeat for additional territories.</td>
</tr>
<tr>
<td>Define coverages</td>
<td>Select attributes to define the boundaries of each territory.</td>
</tr>
<tr>
<td>Select the territory team</td>
<td>Every territory must have an owner and can have additional team members.</td>
</tr>
<tr>
<td>Analyze and compare proposals</td>
<td>Review metrics and graphs to analyze proposals for such things as number of accounts and amount of closed opportunity revenue in each territory.</td>
</tr>
<tr>
<td>Preview territory assignments</td>
<td>Preview assignments of accounts, revenue, and leads for a proposed territory.</td>
</tr>
<tr>
<td>Activate the proposal</td>
<td>Activate a proposal. The proposal remains in pending activation status until the date is reached. You can reopen and update the proposal until the activation date.</td>
</tr>
<tr>
<td>Run reassignment processes</td>
<td>Unless disabled, activation causes the reassignment of opportunity line items and sales accounts. Leads require batch reassignment. Reassignment processes can also be scheduled to run periodically.</td>
</tr>
</tbody>
</table>
Tip

You can restore an historical definition for a territory.

Territory Coverage: Explained

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

A coverage includes the following parts:

- **Dimensional Coverage**: The combination of one or more territory dimensions.
- **Inclusion Coverage**: A list of selected customers or partners, regardless of the defined dimensional coverage, if any. The sales accounts for the selected customers will be assigned to the territory. These sales accounts do not have to be designated as Named accounts in Customer Center.
- **Customer Hierarchy**: You can choose to include the customer hierarchy for the selected customer. All sales accounts for the selected customer hierarchy will be assigned to the territory.
- **Filtering Conditions**: Defined dimensions apply to the included customers and their hierarchies so that only sales accounts that match the dimension definitions get assigned to the territory.
- **Other Dimensions**: Product or sales channel dimensions defined for all of the included customers or partners. Product and channel selections must fall within the jurisdiction of the parent territory if you select Restrict by parent in the dimension selection window.
- **Exclusion Coverage**: A list of excluded customers (including related sales accounts) or partners, regardless of the defined dimensional coverage. You can choose to exclude the customer hierarchy for the selected customer. All dimensions are ignored. The sales accounts do not have to be designated as Named accounts in Customer Center to be excluded.
- **Inheritance Dimension Overrides**: If the territory inherits its coverage from another territory, then its coverage exactly matches that of the source territory. But, you can enter override definitions for one or more dimensions. Dimension definitions added to the override supersede the definitions for the same dimensions contained in the dimensional coverage. The overrides are also added to the customer inclusion Filtering Conditions and Other Dimensions tables. Inheritance applies only to account centric territories, not to partner-centric territories.

Note

When you activate a territory proposal, a reassignment of sales accounts and opportunity revenue lines occurs for territories affected by changes in dimensional coverages. Changes to customer or partner inclusions and
exclusions require a full reassignment process. Leads always require batch reassignment.

Territory Coverages for Partners

A partner is an organization party with a partner profile associated and an assigned Partner usage. Partners are defined in the Partner Center.

Similar to direct sales, channel managers have corresponding sales territories pertaining to partner sales activities. Some channel managers are assigned to specific partners. Some channel managers are assigned to customers for sales activities that involve partners. Channel manager territories can be defined by the following coverage models.

- Coverage Defined by End Customer Characteristics
  The territory of the channel manager is solely defined based on the characteristics of the end customer, irrespective of which partner is associated with the transaction. As an example, a channel manager is assigned to cover all the indirect opportunities where the end customer is located in California. You define territories for this account-centric coverage using customer characteristics, and you can include or exclude specific customers.

- Coverage Defined by Partner Characteristics
  The channel manager’s territory is defined based on some characteristics of the partner, such as where the partner is located or the type of the partner (reseller, system integrator, distributor). As an example, a channel manager is assigned to cover all the indirect opportunities where the partner is located in California.

  To define this territory, you designate the coverage model to be Partner Centric instead of Account Centric. In the Partner Centric model, the regular coverage is defined using the following attributes of a partner organization:
  - Primary geographical location of the partner
  - Organization Type of the partner (for example, private, public, government owned, nonprofit)
  - Industries served by the partner (for example, high tech, manufacturing, banking, pharmaceutical)
  - Size of the partner
  - Three auxiliary dimensions are available for partners based on the customer categories classification model

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

- Individually Selected Partners
  The coverage for the channel manager is defined using a selection of partners to directly assign to or exclude from his partner-centric territory.
As an example, a channel manager is assigned to a partner named AA Solutions. This channel manager will be assigned to all indirect opportunities where AA Solutions is the partner. The opportunities for included partners can be additionally qualified by product and sales channel.

**No Coverage**

You can create a territory that has no coverage. The territory is indirectly defined by the coverages of its descendant territories. You can assign quota to the territory and it can participate in forecasting. The territory cannot be automatically assigned to sales accounts, leads, and opportunities, but you can see the assignments of its descendant territories. You can also assign the territory to an opportunity revenue item as an override.

**Invalid Territories: Explained**

When you activate a territory proposal or perform an Activate action in Enable Dimensions and Metrics to synchronize dimension members, you can end up with invalid active territories because the action is carried out without validation. To perform validation, request the Validate Territories action from within a territory proposal. The validation process identifies invalid territories with a warning icon and invalid dimension members in both proposals and active territories. Use the Next Invalid action to move to the next invalid territory.

**Note**

Only dimensional coverage is validated.

A territory becomes invalid in two ways:

1. The territory contains deleted dimension members. For example:
   - The administrator synchronizes with source data that no longer includes a dimension member (for example, a product group is removed from the product catalog).
   Any active production territory that includes the removed dimension member is invalid until the dimension member is removed from the territory.
   - The administrator disables a dimension that is referenced by an active territory. For example, a territory defined by the customer size dimension becomes invalid when you disable Customer Size.

2. A territory becomes invalid if the boundaries go beyond the boundaries of its parent territory. Examples include:
   - You remove a dimension member from the parent territory.
   A child territory with a dimension member that was removed from the parent territory is invalid until the dimension member is also removed from the child territory. For example, parent and child territories
include the definition for customer size as Small, Medium, and Large. If you change the parent definition to be customer size: Small and Medium, then the child is invalid until you also remove Large from the child territory definition.

• The administrator moves a dimension member to a different location in the dimension hierarchy. For example, a product or product group is moved to a different location in the product catalog. An active child territory that included a dimension member in the changed hierarchy no longer lies within the definition of its parent territory.

Gaps, Overlaps, and Metrics

Metrics information is unavailable for territories that are invalid due to deleted dimension members. The gaps and overlaps reports perform a territory validation and do not display if a territory is invalid. The reports will display territories with children that are larger than their parent.

Using Territory Dimensions: Examples

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

Geography

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

Customer

You have a few key customers that should belong to top salespeople. Use the customer dimension to create territories for individual customers, including their customer hierarchies.

Account Type

You want to assign major sales accounts to Named accounts territories. A named account territory can have child territories identified by additional criteria, such as geography. You also have territories with the account type of Not Named that include no major named sales accounts in the hierarchy.

Customer Size

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

Industry

You sell one type of service to telecommunications companies, another service to utilities, and a third service for insurance companies. You can create territories for each using the industry dimension.
Product
You sell a product line that requires salespeople to have a high degree of technical knowledge. Create separate territories for this product line.

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

Creating Geographic Territories: Examples

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

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

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

Creating Territories Based on Multiple Dimensions: Examples

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

Scenario
The telescope division of your company manufactures and sells a special type of microscope as well as related accessories and supplies. You currently sell mostly to medical laboratories throughout the United States, with a few sales to other industries. Your company recently started supplying microscopes to two large universities and several colleges in the East. Management wants to focus on expanding this new market by dedicating several salespeople to this industry, and identifying universities as named accounts.

The following figure shows the current territory hierarchy for the division, divided into East and West United States with a parent territory to catch any accounts that are not identified as being within the United States. All territories for the Telescopes Division of the company include in the definition the product group: telescopes, accessories, and supplies.
Selling telescopes requires salespeople with more knowledge and experience. Therefore, you separate telescope sales from sales of accessories and supplies within each US region, as shown in the following figure. To accomplish this, you define the Telescopes territories with the Telescopes product and the Telescopes Supplies territories with the Telescope Supplies and Accessories product group.

The Telescopes East territory is defined by:
- Geography: East United States
- Product: Telescopes
- Industry: Any

The Telescope Supplies East territory is defined by:
- Geography: East United States
- Product: Telescope Accessories and Supplies
- Industry: Any

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

The Colleges and Universities East territory is defined by:
- Geography: East United States
- Product: Telescopes
- Industry: Colleges and Universities - 4 year

The Community Colleges East territory is defined by:
- Geography: East United States
- Product: Telescopes
- Industry: Community Colleges - 2 year

Each university named account territory is defined by:
- Included Customer: Harvard (for the Harvard territory)
- Included Customer: Cornell (for the Cornell territory)
- Other Dimensions, Product: Telescopes

Additional customers can be added as needed.

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

A territory coverage is a set of boundaries that define what is included or excluded in the territory and what can be sold. Dimensional coverage consists of the combination of one or more territory dimensions. You can select individual customers (with or without a hierarchy) or partners to include or exclude from the territory in spite of dimension selections. The following scenarios illustrate using different coverages.

Scenario
Two salespeople cover all customers in separate geographic areas, Texas and California. Tom owns the Texas territory, and Sue has California. Sue has a special relationship with the A1 sales account located in Texas. The solution is to add A1 as a customer inclusion to Sue's territory and as a customer exclusion in Tom's territory.

The following figure shows Sue's and Tom's territories.

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

Scenario
A Key Account Director is responsible for a few strategic accounts (named accounts) and all subsidiaries of the strategic accounts. You select each strategic account as an included customer, and choose to also include the hierarchy for each.

Scenario
You own an overlay territory that inherits coverages from several other territories. Create a parent territory with all the inheriting territories as children. The parent has no coverage except the coverages inherited by its children. You can designate each child territory as Forecasted by Parent Territory, and then perform all your forecasting activities for the inherited territories using the parent territory.

Scenario
The territories for your sales managers do not require boundary definitions separate from the territory definitions of their salespeople. Create a parent territory with no defined coverage for the manager. The managers can view and update the territories for their groups, have access to their transactions, and can forecast sales for the group.

The following figure shows the manager's territory with no defined coverage as the parent territory of 3 salespeople's territories.
Who Controls Territory Definitions: Critical Choices

Use territory proposals to make changes to your sales territories, whether performing an annual realignment or keeping up with personnel changes.

Centralized

One person can create or change territory definitions for territory hierarchies owned by different sales managers. A sales administrator performs these actions for the entire organization in a centralized territory management model. Sales managers also are able to make changes as needed to their territory hierarchies.

Decentralized

In a decentralized model, sales managers make changes to territories for the territories below them in the hierarchy. Sales operations people can also take part in the decentralized model, often with limited responsibilities, such as one branch of the hierarchy. The following sequence is one way to change territories in a decentralized model:

1. The sales manager makes suggested changes using one or more proposals.
2. The manager shares or publishes territories within a proposal to the owners of those territories. This allows the owners of the child territories to in turn reflect any required changes down to their own child territories.
3. Managers publish their territory proposal changes down the hierarchy.
4. Owners of child territories make necessary changes, analyze one or more proposals for the best changes, and submit proposals back to the manager who published the proposal, on up the hierarchy.
5. The originating sales manager analyzes and determines the final changes.
6. The originating sales manager sets the activation date and activates the desired proposals.

Note

The owner of a parent territory can make changes to a child territory when the owner is absent. The parent territory owner then publishes the changes to the absent owner’s subordinates.
A manager can designate someone to be the administrator to perform territory management tasks for her on the territory branch the manager owns.

Source and Recipient Territories: How They Work Together

If you have many territories that contain the same value for one of the dimensions, consider setting one territory as the source and let the rest inherit the dimension definition from the one source. Then you only make changes to that dimension in the one source territory, and the rest of the territories inherit the change. This is an easy way to keep dimension definitions synchronized for a number of territories.

Customer or partner inclusions and exclusions can also be inherited. The source and recipient territories can have different territory owners and can be placed in different hierarchies.

In the following figure, the product dimension in the source territory changes from laptops to computers. The recipient territories automatically change to the product computers.

Starting an Inheritance

Use the following procedure to start a territory inheritance:

1. Add a territory to a territory proposal to edit.
2. From the Actions menu, choose **Edit Inheritance**.
3. Select the territory that contains coverages (dimensions or inclusions and exclusions, or both) that you want your proposed territory to inherit. Your territory inherits all coverage information from this source territory, unless you use overrides to change the coverage in the recipient.

Restriction

You cannot have a chain of territory inheritances where territory B inherits from territory A, and B also is a source territory for territory C.
Caution

If a source territory is deleted, automated updates to recipient territories cease.

4. Use overrides to modify what is inherited from the source.

In the following figure, overrides change the dimensional coverage of the recipient territory as well as the other dimensions (dimensions that are not related to sales account attributes) that apply to included customers. The overrides also filter the included customers and their hierarchies to only those matching the override.

5. Add any additional coverage definitions to your proposed territory.

6. Activate your territory proposal.

Note

Recipient territories also inherit the Eligible for Quota, Revise Quota, Revision Reason, and Revision Description from the source territory.

After you make changes to a source territory, use the Update Recipients action in the Territories table on the proposal to start the Territory Inheritance Recipient Update background process to update the recipient territories.

You can change the source territory to none to end the automatic inheritance of territory definitions.

Inherited Territory Coverage: Examples

Use territory inheritance to make coverage changes to one source territory and automatically propagate those changes to recipient territories that have
an inheritance relationship to the source territory. Use overrides to change the
dimensional coverage and other dimension information, and to qualify the
included customers and their hierarchies to only those that match the override
information.

In this example, three dimensions are enabled: geography, industry, and product. The following table provides the source territory definition.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>Any</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
<tr>
<td>Filtering Conditions</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Other Dimensions</td>
<td>Product</td>
<td>Desksops, Laptops</td>
</tr>
</tbody>
</table>

**Recipient Territory 1**

The override for recipient territory 1 is Industry: Services.

The following table show the resulting coverage for recipient territory 1.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>Services</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
<tr>
<td>Filtering Conditions</td>
<td>Industry</td>
<td>Services: Filters out Customers A and C</td>
</tr>
<tr>
<td>Other Dimensions</td>
<td>Product</td>
<td>Desksops, Laptops</td>
</tr>
</tbody>
</table>

**Recipient Territory 2**

The override for recipient territory 2 is Industry: High Tech.

The following table show the resulting coverage for recipient territory 2.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>High Tech</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
</tbody>
</table>
Recipient Territory 3

The override for recipient territory 3 is Product: Laptops.

The following table shows the resulting coverage for recipient territory 3.

<table>
<thead>
<tr>
<th>Coverage Type</th>
<th>Definition</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensional Coverage</td>
<td>Geography</td>
<td>Europe</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Product</td>
<td>Laptops</td>
</tr>
<tr>
<td>Dimensional Coverage</td>
<td>Industry</td>
<td>Any</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer A</td>
<td>Is in the high tech industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer B</td>
<td>Is in the services industry</td>
</tr>
<tr>
<td>Included Customers</td>
<td>Customer C</td>
<td>Is in the utilities industry</td>
</tr>
<tr>
<td>Filtering Conditions</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>Other Dimensions</td>
<td>Product</td>
<td>Laptops</td>
</tr>
</tbody>
</table>

Use Analytics to Test Territory Proposals: Examples

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

Scenario

You want to see how much the number of sales accounts changed between the proposed territory version with new geographic boundaries and the active version. You select the territory and choose the Number of Sales Accounts metric for the current quarter and Version Comparison, Active Version Comparison. You see significantly more sales accounts in your proposed territory.

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

Territory Proposal Statuses: Explained

Use territory proposals to create what-if territories. Activate the proposal that contains the desired changes.
A territory proposal progresses through different statuses in its life cycle.

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>The proposal is first created, and different users can participate to make changes to their child territories. Or, the administrator restored territories to historical definitions and the system completed adding all the required territories to the proposal.</td>
</tr>
<tr>
<td>Pending Activation</td>
<td>The owner requests that the proposal be activated. The proposal is in pending activation status until the activation date.</td>
</tr>
<tr>
<td>Activated</td>
<td>After the owner requested activation, the activation date is reached, and there are no invalid territories, the proposal is activated and the territories become active.</td>
</tr>
<tr>
<td>Processing</td>
<td>Restoring a hierarchy to an historical definition starts a process to identify the changes needed in the proposal.</td>
</tr>
<tr>
<td>Failed</td>
<td>Any changes introduced to territories as part of this proposal are not made.</td>
</tr>
</tbody>
</table>

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

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

**Territory Proposal Rules: Explained**

Use territory proposals to create what-if territories before activating the new territory definitions.

Following are rules for territory proposals:

- Only one definition for a territory can be active at one time.
- To create new or update existing territories, users must use territory proposals.
- You can freely create, edit, and delete territories within a proposal without affecting active territory definitions.
- The owner of a parent territory can update a proposal with changes to a subordinate's territory, provided that the owner of the parent territory has access to the proposal.
• If a given territory is updated in two different proposals, and both of them get activated, the changes of the proposal that’s latest to get activated will override the changes in the other proposal. A territory added to one territory proposal, but then deleted from a second proposal that is activated, is reinstated when the first proposal is activated.

• If a proposal contains territories added to a parent territory that is now deleted, the new territories are deleted during proposal activation.

• A maximum of 500 territories can be children of the same parent territory.

### Restore Territories Process

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

**Settings That Affect Territory Restoration**

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

**How Territory Restoration Is Processed**

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

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

Your restoration selection determines what territories get restored:

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

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

### Territory Export and Import: Overview

You can export any branch of territories to a spreadsheet, perform edits, and import your changes into a territory proposal. You can also export all territories.
from your test environment and import them to your active environment, replacing all records. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets.

Four territory objects are exported and imported using the following four CSV files:

• Header
  The Header file is always required for an import. The file includes the territory name, parent territory, and territory owner.

• Resources
  The resources file is optional. It includes the territory name, resource name, resource function, and resource e-mail address. It is used to import additional territory team members, besides the owner.

• Lines of Business
  The lines of business file is optional. It contains the territory name and the line of business for the territory.

• Coverages
  The coverages file is optional. It contains the territory name and all coverage definitions for each territory. All dimension members needed to define the territory are listed. For every enabled dimension that is not included in the file, the dimension is given the value Any. Included and excluded customers or partners are also listed.

Export and import are available from the Actions list for the territories table in the Active Territories screen. The Territory Proposal screen has only export actions available.

Note
You will see two selections for both export and import: one for editing territories and one for moving territories to and from another environment.

 Territory Header Import File Reference

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_HEADER.csv file. This file is required for imports.

Import and export use a zip file that contains the following four CSV files:

• Territory Header file (TERR_HEADER.csv)
• Territory Resource file (TERR_RESOURCE.csv)
• Line of Business file (TERR_LOB.csv)
• Territory Coverage file (TERR_COVERAGE.csv)

**TERR_HEADER.csv File**

The following table lists the columns included in the Territory Header file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internal_Use</td>
<td>Used only in the case of test to production export and import.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Original_Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>Proposal_Number</td>
<td>The proposal number to which a given territory should be added. If specified, and the proposal already exists and is not activated, then the territory will be added to the proposal. If specified, and the proposal does not exist yet, then it will be created (with the name and number as in this file). If left blank, then the territory will be added to a new, system generated proposal.</td>
<td>Yes</td>
</tr>
<tr>
<td>Proposal_Name</td>
<td>The proposal name to which a given territory should be added. It is used only when a proposal is created (there are no proposals with the number, as per previous entry, in the system). This name is ignored if the proposal (with the number) already exists, or if the proposal number was not specified.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Added_To_Proposal_Y_N</td>
<td>Indicates if the territory was added to the proposal at the time of export. The value is Y if, in the case of exporting from a proposal, the territory is added. In all other cases the value is N. This is for information purposes only. This field is not imported.</td>
<td>No</td>
</tr>
<tr>
<td><strong>Action</strong></td>
<td>Description</td>
<td><strong>Yes</strong></td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>---------</td>
</tr>
<tr>
<td><strong>Territory_Number</strong></td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the system will generate a number at the time of import.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Territory_Name</strong></td>
<td>Territory name.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Parent_Territory_Number</strong></td>
<td>The number of the parent territory. This is used to define territory hierarchy.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Display_Parent_Territory_Name</strong></td>
<td>The name of the parent territory. This is for information purposes only. This field is not imported.</td>
<td>No</td>
</tr>
<tr>
<td><strong>Territory_Type</strong></td>
<td>The name of the territory type, such as Prime or Overlay. Valid names are in the lookup type MOT_TERRITORY_TYPE.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Source_Territory_Number</strong></td>
<td>The number of the source (inherited) territory. Used to define territory inheritance.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Display_Source_Territory_Name</strong></td>
<td>The name of the source (inherited) territory. Used to define territory inheritance. This is for information purposes only. This field is not imported.</td>
<td>No</td>
</tr>
<tr>
<td><strong>Partner_Program_Name</strong></td>
<td>Name of the partner program.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Territory_Partner_Number</strong></td>
<td>Unique identifier (Registry ID) of the territory partner.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Display_Territory_Partner_Name</strong></td>
<td>Name of the territory partner. This is for information purposes only. This field is not imported.</td>
<td>No</td>
</tr>
<tr>
<td><strong>Coverage_Model</strong></td>
<td>The name of the coverage model, such as Sales Account Centric or Partner Centric. Valid names are in the lookup type MOT_TERR_COVERAGE_MODEL.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Territory description.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Fcast_Participation</strong></td>
<td>The name of the forecast participation, such as Revenue or Nonrevenue. Valid names are in the lookup type MOT_TERR_FCST_PARTICIPATION.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Fcast_by_Parent_Territory_Y_N</strong></td>
<td>Forecasted by parent (Y for yes, N for no).</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Eligible_for_Quota_Y_N</strong></td>
<td>Eligible for Quota (Y for yes, N for no).</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Territory Resource Import File Reference

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_RESOURCE.csv file. This file is optional for imports.

Import and export use a zip file that contains the following four CSV files:
- Territory Header file (TERR_HEADER.csv)
- Territory Resource file (TERR_RESOURCE.csv)
- Line of Business file (TERR_LOB.csv)
- Territory Coverage file (TERR_COVERAGE.csv)

#### TERR_RESOURCE.csv File

The following table lists the columns included in the Territory Resource file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display_Original_Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td><strong>Language_Code</strong></td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>-------------------</td>
<td>---------------------------------------------------------------------------------</td>
<td>-----</td>
</tr>
<tr>
<td><strong>Territory_Number</strong></td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the system will generate the number at the time of import.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Display_Territory_Name</strong></td>
<td>Territory name. Used only for a reference.</td>
<td>No</td>
</tr>
<tr>
<td><strong>Resource_Email</strong></td>
<td>Resource e-mail address. It is also the resource’s identifier.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Display_Resource_Name</strong></td>
<td>Resource name. Used as a reference only.</td>
<td>No</td>
</tr>
<tr>
<td><strong>Resource_Function</strong></td>
<td>The name of the role (function) that the resource plays on the territory team, such as Salesperson or Legal. Valid names are in the lookup type MOT_TEAM_MEMBER_FUNCTION.</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Resource_Administrator_Y_N</strong></td>
<td>Is the resource a territory administrator? (Y for yes, N for no.)</td>
<td>Yes</td>
</tr>
<tr>
<td><strong>Resource_Fcast_Delegate_Y_N</strong></td>
<td>Is the resource a forecasting delegate? (Y for yes, N for no.)</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Territory Line of Business Import File Reference**

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_LOB.csv file. This file is optional for imports.

Import and export use a zip file that contains the following four CSV files:
- Territory Header file (TERR_HEADER.csv)
- Territory Resource file (TERR_RESOURCE.csv)
- Line of Business file (TERR_LOB.csv)
- Territory Coverage file (TERR_COVERAGE.csv)

**TERR_LOB.csv File**

The following table lists the columns included in the Territory Line of Business file along with descriptions and whether or not the column is used during the import process:
<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display_Original_Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_Number</td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the system will generate a number at the time of import.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Territory_Name</td>
<td>Territory name. Used only for a reference.</td>
<td>No</td>
</tr>
<tr>
<td>Line_of_Business</td>
<td>The name of the line of business. Valid names are in the lookup type MOT_LINE_OF_BUSINESS.</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Territory Coverage Import File Reference**

You can export and import territories using a spreadsheet, from the Actions menu in the territories table in the Active Territories screen. If you use the provided spreadsheet format, then you can add new territories by importing the spreadsheets. This topic describes the spreadsheet and corresponding table columns for the TERR_COVERAGE.csv file. This file is optional for imports. Import and export use a zip file that contains the following four CSV files:

- Territory Header file (TERR_HEADER.csv)
- Territory Resource file (TERR_RESOURCE.csv)
- Line of Business file (TERR_LOB.csv)
- Territory Coverage file (TERR_COVERAGE.csv)

**TERR_COVERAGE.csv File**

The following table lists the columns included in the Territory Coverage file along with descriptions and whether or not the column is used during the import process:

<table>
<thead>
<tr>
<th>Column Name</th>
<th>Description</th>
<th>Import?</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display_Original_Row_Number</td>
<td>This column is populated only in the rejected data file in case of import errors. It corresponds to the original line number in the input file used by the import process.</td>
<td>No</td>
</tr>
<tr>
<td>Field</td>
<td>Description</td>
<td>Required</td>
</tr>
<tr>
<td>------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
<td>----------</td>
</tr>
<tr>
<td>Language_Code</td>
<td>The language code used for translatable values. In the export file, this is based on the language of the user who triggered the export. Objects, names, and keys that are translatable will be extracted from records in translation tables.</td>
<td>Yes</td>
</tr>
<tr>
<td>Territory_Number</td>
<td>Territory number as in the source environment. For new territories it can be specified or can be left blank. If blank, then the system will generate a number at the time of import.</td>
<td>Yes</td>
</tr>
<tr>
<td>Display_Territory_Name</td>
<td>Territory name. Used only for a reference.</td>
<td>No</td>
</tr>
<tr>
<td>Coverage_Type</td>
<td>The coverage type such as: Dimensional, Inheritance, or Override. Valid names are in the lookup type MOT_TERR_COVERAGE_TYPE.</td>
<td>Yes</td>
</tr>
<tr>
<td>Dimension_Name</td>
<td>Valid values are:</td>
<td>Yes</td>
</tr>
<tr>
<td></td>
<td>• Customer</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Customer Auxiliary 1</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Customer Auxiliary 2</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Customer Auxiliary 3</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Customer Size</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Geography</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Industry</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Account Type</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Organization Type</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Partner</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Product</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Sales Channel</td>
<td></td>
</tr>
<tr>
<td>Dimension_Member_Key</td>
<td>Dimension member reference. See Dimension Member Rules table. At the time of import, if the key is supplied then it is used for matching, and Dimension_Member_Name is ignored. If the key is not supplied, then the Dimension_Member_Name will be used for matching.</td>
<td>Yes</td>
</tr>
<tr>
<td>Dimension_Member_Name</td>
<td>Name of the dimension member. See Dimension Member Rules table.</td>
<td>Yes</td>
</tr>
</tbody>
</table>
### Dimension Member Rules

Use the rules in the following table when entering dimension member keys or names:

<table>
<thead>
<tr>
<th>Dimension Name</th>
<th>Comment</th>
<th>Dimension_Member_Key</th>
</tr>
</thead>
<tbody>
<tr>
<td>Account Type</td>
<td>Only one of two values are allowed. Dimension_Member_Name does not need to be specified.</td>
<td>Named / Not Named</td>
</tr>
<tr>
<td>Account Auxiliary 1..3</td>
<td>Enter a value as seen in territory UIs. Dimension_Member_Name does not need to be specified.</td>
<td>Value as seen in UIs</td>
</tr>
<tr>
<td>Customer</td>
<td>Enter OS+OSR Number (if known) or Registry ID (as seen in TM UIs). OS stands for Original System. OSR stands for Original System Reference. OS+OSR exists only if customer data was imported from an external system. Dimension_Member_Name does not need to be specified.</td>
<td>OS+OSR Number or Registry ID (as seen in UIs)</td>
</tr>
<tr>
<td>Customer Size</td>
<td>Enter a value as seen in territory UIs. Dimension_Member_Name does not need to be specified.</td>
<td>Value as seen in UIs</td>
</tr>
<tr>
<td>Geography</td>
<td>If you know that a specific geography name is unique, then enter a value as seen in territory UIs, for example, Boston. If unsure, or if you know that the name is not unique, enter the full path such as United States<del>New York</del>New York. The full path is made up of geography members as seen in UIs concatenated with ~ character. Dimension_Member_Name does not need to be specified.</td>
<td>Value as seen in territory UIs, or a full path if the geography name is not unique.</td>
</tr>
<tr>
<td>Industry</td>
<td>Enter a value as seen in territory UIs. Dimension_Member_Name does not need to be specified.</td>
<td>Value as seen in UIs</td>
</tr>
<tr>
<td>Organization Type</td>
<td>Enter a value as seen in territory UIs. Dimension_Member_Name does not need to be specified.</td>
<td>Value as seen in UIs</td>
</tr>
<tr>
<td>Partner</td>
<td>Enter OS+OSR Number (if known) or Registry ID (as seen in territory UIs). OS stands for Original System. OSR stands for Original System Reference. OS+OSR exists only if partner data was imported from an external system. Dimension_Member_Name does not need to be specified.</td>
<td>OS+OSR Number or Registry ID (as seen in UIs)</td>
</tr>
<tr>
<td>---------</td>
<td>-------------------------------------------------------------------------------------------------</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>Product</td>
<td>Enter the product name (in the Dimension_Member_Name column) as seen in TM UIs. Leave Dimension_Member_Key column empty. If this does not result in unique identification of the product dimension member, then the following will need to be done: For product group: Enter Product Group Internal Name (exposed in the Order Capture application) into the Dimension_Member_Key column. For product item: Enter Item Number (exposed in the Product Model application) into the Dimension_Member_Key column. When Dimension_Member_Key column is specified, the value in Dimension_Member_Name column is ignored.</td>
<td>Product Group - Internal Name or Product Item - Item Number.</td>
</tr>
<tr>
<td>Sales Channel</td>
<td>Enter a value as seen in territory UIs. Dimension_Member_Name does not need to be specified.</td>
<td>Value as seen in UIs.</td>
</tr>
</tbody>
</table>

### FAQs for Manage Sales Territories

#### When does a territory administrator define territories?

Sales managers define territories because they have the knowledge about their assigned territory and about their salespeople, and are best able to assign territories equitably. Sales managers delegate the territory definition activity to sales administrators to save time. Use security to assign specific territory hierarchy branches to your sales administrator or provide the sales administrator with access to all territories.

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

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

What's a line of business?

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

What happens if I select Forecasted by Parent Territory?

The territory is hidden in the Forecasting Overview page, but is available on the Edit Forecast page. The owner of the parent territory can submit the forecast for the child territory. If the child territory owner also owns the parent territory, then the territory owner can edit forecast items, add and remove forecast items as adjustments, and adjust the territory forecast.

When do I restore territories?

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

What's a territory overlap?

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

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

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

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

**What's a territory gap?**

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

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

Sales Quota Management: Overview

Sales Quota Management provides a comprehensive solution for managing sales quotas to maximize quota attainment and improve overall sales performance. Effective top-down planning with bottom-up assessments ensures that quotas relate to corporate goals. The full integration with territory management and incentive compensation enables end-to-end sales performance management processes. After the sales plan is deployed for the year, sales executives can then monitor and track sales performance by comparing forecasts with actuals and with quotas.

Summary of Features

The key features of Quota Management include the following:

- Assign territory quotas to territories and resource quotas to people.
- Align multiple resource quotas to different sales goals. For example, create sales goals for hardware revenue and for number of sales calls.
- Review quotas assigned to you by your senior manager and allocate quotas to your salespeople.
- Use formulas to calculate territory quotas using measurements of historical data and future potential.
- Add adjustments to a quota before distributing it.
- Track current quota achievement compared with quota targets.
- Manage seasonal variations in sales by distributing the revenue quota among several calendar periods using seasonality guidance.
- Send notification to Incentive Compensation with new and changed individual quota assignments for all sales goals.

Sales Quota Plan Components: How They Work Together

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

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

**Sales Quota Plan**

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

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

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

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

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

**Sales Goals: Explained**

A sales goal determines how quota is measured and defines what you want to measure. Commonly used sales quotas are simply salesperson targets for revenue achievement in their respective territories. Such sales quotas are modeled as Sales Revenue Goals. This goal is automatically assigned to every territory owner during the annual quota planning process. Create additional sales goals, such as sales volume or number of customer visits, if you want to assign other quotas to your salespeople.

This figure shows the components of a sales goal. A sales goal supports a particular objective. You can use any unit of measure for your sales goal and specify what to measure, for example, number of sales calls. The provided unit of measure choices are amount and quantity, but you can also define your own unit of measure. Each sales goal contains only one measure. You can also focus the sales goal on one or more product groups. For example, the Hardware Goal is defined as the sales revenue amount for the hardware product group.
Note

The unit of measure cannot be changed after the administrator creates the sales goal.

With extensibility, you can set up other focus areas, such as accounts or sales accounts.

Multiple Quotas for One Resource

You must create multiple sales goals if you want to assign multiple quotas to one resource.

This figure shows multiple quotas assigned to a salesperson within the current active quota plan year. The salesperson owns a territory and therefore has a Revenue Goal quota plus the two quotas manually assigned by the salesperson’s manager.
Note

A resource can have only one quota per sales goal for the year. You can assign new quotas only for active sales goals. Inactivating a sales goal does not affect existing quotas for that sales goal.

When you submit notifications to compensation, quotas for all sales goals for the resource are included in the notification.

Territory Quota Formulas: Explained

Territory quota formulas calculate territory quota based on historical sales information and metrics such as forecasts and market potential. The calculated quotas appear as default territory quota amounts in the sales quota plan. The formulas execute a Multidimensional Expressions (MDX) query on the territories Oracle Essbase hypercube.

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

Predefined Formulas

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

- Scale a measure from a past period by a percentage
  Total the amounts for a selected measure for the past selected year. Calculate the stated percentage of the total and add it to the total.
  For example, 110 percent of closed bookings for fiscal year 2009.

- Percentage change in a measure value over 2 consecutive periods
  Subtract the total amounts for a selected measure for one year from the total amounts for the subsequent year. Divide the difference by the total of the first year to determine the percentage of change. Calculate the percentage of the total value of the second year and add the result to the year’s total.
  For example, closed bookings for 2009 minus closed bookings for 2008 divided by 2008 total gives the rate of change as 8 percent. Calculated quotas are 108 percent of the 2009 closed bookings.

- Percentage change in a measure value over 2 named time periods (current and past)
  Subtract the total amounts for a selected measure for a selected year from the total amounts for the current year. Divide the difference by the total of the earlier year to determine the percentage of change. Calculate the percentage of the total value of the current year and add the result to the year’s total.
  For example, closed bookings for 2010 minus closed bookings for 2007 divided by 2007 total gives the rate of change as 7 percent. Calculated quotas are 107 percent of the 2007 closed bookings.
Creating Formulas

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

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

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

Published Quotas: Explained

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

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

- The territory quota
- The resource quotas for all sales goals for the selected territory
- The quotas assigned to finer time periods

Quotas in the published status cannot be changed or published again without first changing the status to pending revision. Activating a territory proposal that affects quotas will change the status to pending revision. You can use Revise in the Action menu to change the status of a selected territory to Pending Revision, if you have the permission to do so.

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

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

Resource Quota and Incentive Compensation: How They Work Together

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

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

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

Sales Goals

A sales goal determines how quota is measured and defines what you want to measure. The sales goal used for territory owner’s revenue quotas is the Revenue Sales Goal. In order to assign multiple quotas to an individual salesperson or to assign quotas to salespeople other than territory owners, you must use a sales goal other than the Revenue Sales Goal. Examples of sales goal definitions include number of customer visits, number of service contracts sold, and revenue for the hardware product group.
Notifications to compensation include quotas for each quota-carrying resource for all sales goals. For each salesperson, the notification contains all the annual resource quotas for all applicable goals as well as the period quotas.

**Updating Compensation Plans**

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

**Sales Quotas Import: Overview**

Within a selected quota plan in Manage Sales Quotas, you can select a territory hierarchy within your control and import resource quotas and territory quotas from a spreadsheet. During the quota planning cycle, sales operations users consolidate quota information for the territories that they support into the spreadsheet and import the new quota allocations.

The data is imported only to quota plans that are active and being tracked.

Territory quotas, territory period quotas, resource quotas, and resource period quotas are imported using the following four CSV files:

- **Territory_Quota.csv**
  The file includes the territory name, parent territory, and territory quota.

- **Territory_Period_Quota.csv**
  The file includes the quota by period (for example, month) for each territory quota.

- **Resource_Quota.csv**
  The file contains the resource quota per sales goal, and related compensation plan notification status.

- **Resource_Period_Quota.csv**
  The file includes the quota by period (for example, month) for each resource quota.

Import is available from the Actions list for the territory quota table in Manage Sales Quotas.

**Territory Quota Import File Reference**

Within a selected quota plan in Manage Sales Quotas, you can select a territory hierarchy within your control and import resource quotas and territory quotas from a spreadsheet. In the spreadsheet, you can allocate quotas and import your
new quota allocations to the active quota plans that are being tracked. During
the quota planning cycle, sales operations users consolidate quota information
for the territories that they support into the spreadsheet and import the new
quota allocations. This topic describes the spreadsheet and corresponding table
columns for the Territory_Quota.csv file

Import uses a zip file that contains the following four CSV files:

- Territory_Quota
- Territory_Period_Quota
- Resource_Quota
- Resource_Period_Quota

**Territory_Quota.csv File**

The following table lists the columns included in the Territory Quota file along
with descriptions. Territory Quota and Allocation Comments fields will be
updated from the file. The rest of the required fields are used for validation.

<table>
<thead>
<tr>
<th>Import Sheet Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the territory quota. Unique user key. Required column.</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key. Required column.</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
</tr>
<tr>
<td>StartDate</td>
<td>The start date of the quota period in MM/DD/YY date format.</td>
</tr>
<tr>
<td>EndDate</td>
<td>The end date of the quota period in MM/DD/YY date format.</td>
</tr>
<tr>
<td>TerritoryQuota</td>
<td>Quota assigned to this territory.</td>
</tr>
<tr>
<td>Currency</td>
<td>CRM corporate currency</td>
</tr>
<tr>
<td>Status</td>
<td>Status of this territory quota: PUBLISHED, NON-PUBLISHED, or PENDING REVISION.</td>
</tr>
<tr>
<td>PublishedDate</td>
<td>Date territory quota is published, in MM/DD/YY date format.</td>
</tr>
<tr>
<td>AllocationComments</td>
<td>Allocation comments for the quota.</td>
</tr>
</tbody>
</table>

**Territory Period Quota Import File Reference**

Within a selected quota plan in Manage Sales Quotas, you can select a territory
hierarchy within your control and import resource quotas and territory quotas
from a spreadsheet. In the spreadsheet, you can allocate quotas and import
your new quota allocations to active quota plans that are being tracked. During
the quota planning cycle, sales operations users consolidate quota information
for the territories that they support into the spreadsheet and import the new
quota allocations. This topic describes the spreadsheet and corresponding table columns for the Territory_Period_Quota.csv file.

Import uses a zip file that contains the following four CSV files:

- Territory_Quota
- Territory_Period_Quota
- Resource_Quota
- Resource_Period_Quota

**Territory_Period_Quota.csv File**

The following table lists the columns included in the Territory Period Quota file along with descriptions. The Territory Period Quota field will be updated from the file. The rest of the required fields are used for validation.

<table>
<thead>
<tr>
<th>Import Sheet Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the territory quota. Unique user key. Required column.</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key. Required column.</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
</tr>
<tr>
<td>PeriodName</td>
<td>Name of the period from GL_PERIODS. Unique user key. Required column.</td>
</tr>
<tr>
<td>StartDate</td>
<td>The start date of the quota period.</td>
</tr>
<tr>
<td>EndDate</td>
<td>The end date of the quota period.</td>
</tr>
<tr>
<td>TerritoryPeriodQuota</td>
<td>Quota assigned to specific period.</td>
</tr>
</tbody>
</table>

**Resource Quota Import File Reference**

Within a selected quota plan in Manage Sales Quotas, you can select a territory hierarchy within your control and import resource quotas and territory quotas from a spreadsheet. In the spreadsheet, you can allocate quotas and import your new quota allocations to active quota plans that are being tracked. During the quota planning cycle, sales operations users consolidate quota information for the territories that they support into the spreadsheet and import the new quota allocations. This topic describes the spreadsheet and corresponding table columns for the Resource_Quota.csv file.

Import uses a zip file that contains the following four CSV files:

- Territory_Quota
- Territory_Period_Quota
- Resource_Quota
- Resource_Period_Quota
Resource_Quota.csv File

The following table lists the columns included in the Resource Quota file along with descriptions. Resource Quota and Allocation Comments fields will be updated from the file. The rest of the required fields are used for validation.

<table>
<thead>
<tr>
<th>Import Sheet Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Action</td>
<td>Action Code: Allowed values are INSERT, UPDATE, and DELETE.</td>
</tr>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the territory quota. Unique user key. Required column.</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key. Required column.</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
</tr>
<tr>
<td>ResourceName</td>
<td>Salesperson’s name.</td>
</tr>
<tr>
<td>ResourceEmail</td>
<td>Salesperson’s e-mail address. Unique user key. Required column.</td>
</tr>
<tr>
<td>GoalNumber</td>
<td>Sales goal number. Unique user key. Required column.</td>
</tr>
<tr>
<td>GoalName</td>
<td>Sales goal assigned to resource quota.</td>
</tr>
<tr>
<td>Currency</td>
<td>CRM corporate currency.</td>
</tr>
<tr>
<td>ResourceQuota</td>
<td>Quota assigned to salesperson and associated with specific sales goal.</td>
</tr>
<tr>
<td>UnitOfMeasure</td>
<td>Resource quota UOM: Quantity or Amount.</td>
</tr>
<tr>
<td>StartDate</td>
<td>Resource quota start date.</td>
</tr>
<tr>
<td>EndDate</td>
<td>Resource quota end date.</td>
</tr>
<tr>
<td>AllocationComments</td>
<td>Comments about the resource quota allocation.</td>
</tr>
<tr>
<td>CompensationPlanStatus</td>
<td>The status of quota being incorporated into the salesperson's compensation plan.</td>
</tr>
<tr>
<td>CompensationPlanSubmittedDate</td>
<td>The date that the quota was submitted to the compensation analyst in order for the compensation plan to be updated.</td>
</tr>
</tbody>
</table>
Import uses a zip file that contains the following four CSV files:

- Territory_Quota
- Territory_Period_Quota
- Resource_Quota
- Resource_Period_Quota

**Resource_Period_Quota.csv File**

The following table lists the columns included in the Resource Period Quota file along with descriptions. The Resource Period Quota field will be updated from the file. The rest of the required fields are used for validation.

<table>
<thead>
<tr>
<th>Import Sheet Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>QuotaPlanName</td>
<td>The sales quota plan containing the resource quota. Unique user key. Required field.</td>
</tr>
<tr>
<td>ParentTerritoryName</td>
<td>The name of the parent territory for the territory that is assigned the quota.</td>
</tr>
<tr>
<td>TerritoryNumber</td>
<td>External territory identifier. Unique user key. Required field.</td>
</tr>
<tr>
<td>TerritoryName</td>
<td>Name of the territory.</td>
</tr>
<tr>
<td>ResourceName</td>
<td>Salesperson’s name.</td>
</tr>
<tr>
<td>ResourceEmail</td>
<td>Salesperson’s e-mail address. Mandatory attribute and acts as a Unique User Key. Required field.</td>
</tr>
<tr>
<td>GoalNumber</td>
<td>Sales goal number. Unique user key. Required field.</td>
</tr>
<tr>
<td>GoalName</td>
<td>Sales goal assigned to resource quota.</td>
</tr>
<tr>
<td>PeriodName</td>
<td>Name of the period from GL_PERIODS. Unique user key. Required field.</td>
</tr>
<tr>
<td>StartDate</td>
<td>Start date of the period.</td>
</tr>
<tr>
<td>EndDate</td>
<td>End date of the period.</td>
</tr>
<tr>
<td>ResourcePeriodQuota</td>
<td>Resource Quota assigned to specific period.</td>
</tr>
<tr>
<td>UnitOfMeasure</td>
<td>Resource quota UOM: Quantity or Amount.</td>
</tr>
<tr>
<td>Currency</td>
<td>CRM corporate currency.</td>
</tr>
<tr>
<td>AllocationComments</td>
<td>Comments about the resource quota allocation.</td>
</tr>
</tbody>
</table>

**FAQs for Manage Sales Quotas**

**What’s a variance?**

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

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

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

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

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

What's an adjustment?

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

What's a spread formula?

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

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

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

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

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

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

- A territory is deleted. All resource quotas within the territory have the same end date as the territory end date. The sales quota plan end date is not yet reached.
- A territory resource is removed from a territory, and the resource is end dated.
- Quota is assigned to a future dated resource who will join the organization in future.

When do I exclude a territory from quota?

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

What's a territory administrator?

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

Base Sales: Overview

The Base Sales applications consist of a suite of modules and business intelligence reports.

Summary of Features

The key features of Base Sales include the following:

• Competitors: The Competitors module lets you create competitors and store a variety of competitor data. You can leverage competitor data in other sales modules, such as opportunity management and in the product landscape. See the topic, Sales Competitors: Overview, for more information.

• References: The References module lets you store and leverage reference customer data throughout the sales process. See the topic, Sales Reference Customers: Overview, for more information.

• Sales Dashboard: The Sales Dashboard is the one-stop site for sales managers and salespeople to access intelligence reports and a variety of productivity tools, such as their calendar and tasks. See the topic, Sales Dashboard: Overview, for more information.

• Business Intelligence Reports: The application suite includes several predefined sales business intelligence reports that give sales managers and salespeople insight into opportunities, sales revenue, sales pipeline, and more. See the topic, Sales Dashboard: Overview, for more information.

Sales Dashboard: Overview

The Sales Dashboard lets sales teams perform sales activities and track progress against day-to-day sales activities. In addition, with embedded analytics, sales managers view the effectiveness of individual and team sales execution.
Summary of Features

The dashboard is configurable. The key features of the Sales Dashboard include the following:

- One-Stop Landing Page: Sales staff have access to all of their daily activities in one spot. They can view reports about a variety of sales metrics, drill down to transactional data, and access productivity tools.

- Business Intelligence Reports: Several sales business intelligence reports are available for sales staff to add to the dashboard. See the topic, Sales Business Intelligence Reports: Explained for more information.

- Productivity Tools: Several sales-integrated productivity tools are supplied, including the Calendar, Key Contacts, My Tasks portlets, and Activity Streams.

- Drill Down into Transactional Data: Sales personnel can navigate to business objects, such as opportunities and sales accounts, and see the underlying transactional data.

Manage Sales Competitors

Sales Competitors: Overview

The Base Sales Competitors module lets organizations store and leverage competitor information. You can drill down to a particular competitor and view competitive presence information associated with product groups.

Summary of Features

The key features of Base Sales Competitors include the following:

- Competitor Profile: Store several aspects of competitors including name, stock symbol, company URL, organization size, D-U-N-S information, and more.

- Industries and Geography: View all industries and geographies where the competitors are doing business.

- Internal Experts: Leverage internal organization experts who have knowledge about the associated competitor.

- Products: Track all product groups that a competitor is associated with and view customers buying competitor products. The data for this feature is sourced from the Competitive Product Presence node in Customer Center. Competitive Presence provides information on product groups or products that the deploying organization currently sells or is interested in selling to the customer.

- SWOT: Examine competitor SWOT (strength, weakness, opportunity, threat) values. Craft strategies against threatening competitors.
• Collateral: Store relevant competitor documents. After you store them, salespeople can access the competitive collateral to position products or solutions against competitors.

• Competitive Landscape: This feature displays how the top-five competitors are faring with a group of customers.

• Competitors in Opportunities and Revenue Items: Associate competitor information with opportunities, both at the opportunity level and at the revenue-line level. These associations allow you to capture win/loss information about competitors and drill down to competitor information.

Competitor Profiles: Explained

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

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

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

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

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

Competitor Profile

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

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

• Internal Experts
  
  Internal experts are resources within your organization who hold expertise on the associated competitor. You can leverage the knowledge of the internal experts while working on a deal. You can further categorize internal experts by associating them with specific product groups.

• Product Groups
You can store and leverage a list of all products or product groups the competitor is associated with. In addition, you can also see the customers who are buying the associated products from the competitor.

- **Opportunities**
  Opportunities data includes a consolidated view of past and current opportunities where the competitor was present. It gives you useful insight to plan the appropriate sales strategies.

- **Industries**
  You can store and leverage a list of all industries where the competitor competes with the deploying organization.

- **Geographies**
  You can store and leverage a list of all geographies where the competitor is at play.

- **Attachments**
  You can store and leverage a list relevant documents for a competitor, giving you access to a variety of competitive collateral with information on how to position products or solutions against specific competitors. This information might include industry and analyst reports about competitors, as well as strategy documents for a specific industry that can benefit you in a selling situation.

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

### FAQs for Manage Sales Competitors

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

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

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

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

**How can I view competitor products purchased by a customer?**

To view competitor products purchased by a customer, navigate to the customer’s information page, and then navigate from competitive presence to the product group details.

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

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

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

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

**What's SWOT?**

SWOT stands for: Strengths, Weaknesses, Opportunities, and Threats. The SWOT attribute in the Competitors module of Oracle Sales Cloud gives organizations a way to examine the strengths, weaknesses, opportunities, and threats of a competitor. SWOT analysis can provide insight into how a competitor’s resources are mapped against the environment in which it is pitted against the deploying organization. As part of the competitor profile, SWOT provides a mechanism to plan, strategize and compete against your competition.

**Manage Sales References**

**Sales Reference Customers: Overview**

Reference customers are a valuable asset to any sales team because they provide support of the sale. The References module of Base Sales lets organizations create, store, and manage sales reference customer profiles and then use...
those reference customers in CRM Sales applications, such as opportunity management.

**Summary of Features**

The key features of the References module of Base Sales include the following:

- **References Profile:** Store and maintain the reference customer profile, which also displays some underlying party-specific attributes and lists the deals the reference has already participated in.
- **Status:** Status lets you indicate whether the reference is active or not.
- **Rank:** Rank is an internal ranking designated by the team that maintains references.
- **Type:** Type is an internal marker, such as Gold, Silver, or Bronze, that is meant to record the internal priority of the reference.
- **Supported Activity Types:** Activity types are the different ways the customer allows contact, such as a site visit or a phone call. For each activity type, you can specify the number of activities that the customer allows.
- **Collateral:** Reference-customer collateral gives salespeople materials to help them make sales.
- **Reference Products:** Associate products and product groups that the reference customer has purchased and enter comments about the customer experience with the sale or the products themselves.
- **Reference Association with Opportunities:** The Opportunities tab displays all opportunities where the reference customer was used.
- **Reference Recommendations:** Within an opportunity page, the Reference Recommendations pane lets salespeople select a product, and then the application generates a list of recommended sales references for the product or product group.

**Reference Customer Profiles: Explained**

The reference customer profile allows organizations to store and leverage a multitude of information about references.

**Reference Profile Contents**

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

- **Supported Activity Types**

  The reference customer profile includes a listing of various reference activity types that the customer will engage in. These activities include prospective customer visits to their site, phone calls, conference participation or subject of a case study. An activity has a threshold number such as a maximum of two site visits during a certain threshold period such as a quarter or year.
- **Products**
  You can select from a list of products purchased by the reference customer or you can search and add products and product groups. These are products that the customer has purchased and has agreed to endorse as part of the reference program.

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

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

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

- **Industries**
  Displays the industries that the reference customer has a business in.

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

### FAQs for Manage Sales References

**How can I create a reference customer?**

Creating a reference customer involves marking an existing customer as a reference customer. To do so, navigate to the Profile node of the customer tree. In the edit page of the customer, use the Actions menu to Manage References. In the Create Sales References page, activate some reference attributes of the customer, such as Rank or Type. Save your changes. Note that if you have accessed a customer who is already a reference customer, the page will be named Edit Sales Reference instead of Create Sales Reference.

**Who typically manages sales reference customers?**

The Sales Administrator is the role that can create and manage sales reference customers.
What's a reference rank?

Use ranks to classify your reference customers. Ranks 1 to 5 are supplied in the application, with Rank 1 being the highest.

Following is a brief description of what the supplied ranks mean. You can configure them based on your requirements.

- **Rank 1**
  
  Top-tier corporate reference

- **Rank 2**
  
  Very strong reference with multiple products and contracts

- **Rank 3**
  
  Strong regional reference for multiple products

- **Rank 4**
  
  Limited-use reference based on one product or one person

- **Rank 5**
  
  Likely to be referenceable upon resolution of customer issues

How can I limit reference activities for a reference customer?

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

Deliver Customer Care: Overview

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

The tasks include:

- **Create Sales Organization**: Create import, review, and search customer accounts. Administrators can mark a customer account as a named account. This means the account is a large or important account that is assigned to its own territory and sales team.
- **Create Consumer**: Create, import, view, edit consumers for an account. Consumers are the B2C equivalent of a customer.
- **Manage Contacts**: Create, view, edit, or delete customer and consumer contact information.
- **Manage the Sales Account Team**: Designate and view salespersons, partners, and their territories.
- **Assign Sales Parties**: Designate parent and subsidiary companies of the sales organization.
- **Manage Sales Party, Partner, and Territory Assignment**: Assign resources to opportunities or leads to complete the sales process.
- **Manage Account Appointments**: Create, view, edit, or delete account appointment information.
- **Manage Account Interactions**: Create, view, edit, or delete account interaction information.
- **Manage Account Notes**: Create, view, edit, or delete account notes information.
- **Manage Account Tasks**: Create, view, edit, or delete account tasks information.
- Manage various activities, such as:
  - **Manage Classification Schemes**: Manage the categorization of customers by NAICS codes.
- **Manage Forums:** Moderate and track discussion forums.
- **Manage Named Account Setting:** Sales Administrator denotes and tracks whether a sales account is a named account.
- **Manage Organization Chart:** Create and edit organization structural diagrams.
- **Manage Reference:** Some Customers agree to act as product references. This task indicates and manages the reference customers type, for example Gold or Silver. Used to categorize the priority of the customer.

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

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

To navigate to the Customer Center:

<table>
<thead>
<tr>
<th>Business Process</th>
<th>Role</th>
<th>Work Area</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer Relationship Management Application - Set Up Customer Center</td>
<td>Customer Relationship Management Application Administrator</td>
<td>Set Up and Maintenance</td>
</tr>
<tr>
<td><strong>Note</strong></td>
<td>Usually sets up the Customer Center for Sales and for Marketing.</td>
<td></td>
</tr>
</tbody>
</table>

For Sales, select **Navigator, Set Up and Maintenance, Set Up Customer Center for Sales Leads**

For Marketing select **Navigator, Set Up and Maintenance, Configure Customer Center for Marketing Responses**

For Opportunity Management select **Navigator, Set Up and Maintenance, Configure Customer Center for Opportunity Management**
### Oracle Sales Cloud Accounts and Contacts: Explained

Oracle Sales Cloud accounts and contacts enables the comprehensive management of customer information. You can collect data from various services, and present this data in one location for optimal management.

Following are some of the accounts and contacts capabilities:

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

Be aware of the following terminology used throughout the application:

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

### Sales Prospect

A sales prospect is a prospective sell-to entity, or person, at an existing or potential customer used to define Leads. A prospect is the lowest level representation of a business entity that your company’s marketing processes will track and act upon. The sales prospect does not have a sell-to address. You can create a sales prospect from a party that does not have a sell-to address when you create the first lead for that party. You can also create sales prospects directly in Oracle Sales Cloud and by importing them in bulk.

You can create leads against sales prospects, but a sales prospect must be qualified and converted to a sales account before you can create opportunities.

<table>
<thead>
<tr>
<th>Sales</th>
<th>Sales Administrator (Set Up and Maintenance)</th>
<th>Set Up and Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Sales Manager (transaction)</td>
<td>Select Navigator, Set Up and Maintenance, Set Up Customer Center for Sales Leads</td>
</tr>
<tr>
<td></td>
<td>Sales Representative (transaction)</td>
<td>For Customer Center transactions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select Navigator, Sales, Customer</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Lead Management</th>
<th>Marketing Operations Manager (Set Up and Maintenance, transactions), Sales Lead Qualifier (transaction)</th>
<th>Set Up and Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Select Navigator, Set Up and Maintenance, Configure Customer Center for Marketing Responses</td>
</tr>
<tr>
<td></td>
<td></td>
<td>For Customer Center transactions</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Select Navigator, Lead Processing</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunity Management</th>
<th>Sales Representative (transactions)</th>
<th>For Customer Center transactions</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Select Navigator, Sales, Customer</td>
</tr>
</tbody>
</table>
for it. To qualify and convert a sales prospect, a set of business criteria or rules must be satisfied. For example, the prospect may be required to meet the criteria for account assignment.

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

Customer
Within Oracle Sales Cloud, sales accounts and sales prospects are collectively referred to as Customers. There are three types of customers: Account, Contact, and Household. Additionally, a Customer also can have representations as a legal entity and a billing account that are expressed as root nodes in a hierarchy to the respective sales accounts for that customer.

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

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

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

Customer Trees: Explained

There are two types of Oracle Sales Cloud Customer trees. Each tree displays a different set of nodes based on party type. The information that you are able to view and edit on each node depends upon your security privileges and your membership status on the sales account team.

The two types of Customer Center trees are:

• Customer Tree
• Contact Tree

Customer Tree
The customer tree displays similar nodes for the three customer types, Account, Contact, and Household, such as Profile, Contacts, Sales Account Team, or Assessment. If you are a member of the sales account team with at least Edit level access or you have the Sales Party Administration duty, you can update information on the following nodes: contacts, organization chart, classifications, assessments, and notes. Only those users with Sales Party Administration duty or Full level access on the sales account team and profile nodes can update the members of the sales account team.

Contact Tree
The contact tree displays nodes for contacts with the contact profile and other related information such as the Profile (contact details), interactions with the contact, notes, and so on. Leads and Opportunity applications can be accessed here. All nodes on the contract tree are visible to all users.

Manage Account and Contact Trees: Explained

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

Managing account and Contact Trees
Set these attributes for each node in the Account or Contact tree:
- Name - the name shown in the customer tree UI.
- Visible - indicates whether the node will be visible in the tree.

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

- Default - the node shown when a user drills down into the tree.
- Portlet - indicates whether the node is a portlet or a local task flow. A portlet is a non-local task flow residing in another business process. For example, when accessing the Opportunities node in the Lead Management application, the Opportunities node is a portlet because the Opportunities task flow resides in the Sales applications, outside of the local Lead Management application. Each Oracle Sales Cloud service using the Account and Contact functionality is delivered with the appropriate portal information already configured and should not be
changed. All tree nodes that render portlets have the 'Visible' flag turned off. If the portlet is required to be visible, the 'Visible' flag needs to be changed to show the node.

- **Parameters** - specify input variables and values for the node. There are only three nodes that require parameters. These nodes are specifically for third-party integration: OneSource Profile, Service Requests, and Snapshot:

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

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

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

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

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

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

**Manage Contacts: Explained**

Any person can be a contact. That person need not be related to any customer. For example, a sales person may meet an early stage contact in an airport or
conference and wants to follow up with that person, the contact, as a prospective customer. A person who is a contact can be related to one or more customers such as a regional purchasing agent for multiple sales accounts. A person may also be both a customer as well as a contact of another customer.

You can manage your contacts several ways:

- Create Contact
- Manage Contacts
- Edit Contact: Profile
- Edit Customer: Contact

Create Contacts

Select Create Contact in the regional area to create a new person with an optional organizational or customer relationship. When creating a new contact, existing contacts are checked for duplicate entries. If there is a match, you can choose from the duplicate or continue creating the new person. You can also use Quick Create Contact located in the Regional area.

Manage Contacts

Manage Contacts enables you create new contacts and to search for existing contacts with customer relationships and edit them. To edit a contact, highlight the record for the contact in the search results and click the edit icon, or click the last name in the search results. You can also navigate to the customer page for that contact by clicking the company name. You can designate a contact as a key contact here. My Key Contacts is a setting used by the saved search of the same name to list only those contacts that are important to you.

Edit Contact: Profile

The Edit Contact: Profile page gives a complete picture of the contact including all the customer relationships and the contact points associated with this contact. You can designate a contact point, such as phone or e-mail, as primary for the contact. For example, the contact may have two cell phones and you can designate one as the primary means to communicate with the contact. When you create a contact and add multiple contact points of a type, the first contact point associated with a customer relationship is defaulted as the primary contact for the relationship. Contact point information is available for additional names, addresses, phones, e-mails, instant message accounts, and web addresses. The Primary by Customer Relationship designation means that a contact point has been designated the primary method of communication to the customer for this contact. The Primary by Customer Relationship is set, and can only be edited, in the Edit Customer: Contact UI.

Edit Customer: Contact

The Edit Contact: Profile page gives a complete picture of all the contacts for the selected customer. You can manage contact information for the individual contact here in the context of the specific customer relationship. Contact points marked as primary here will be seen as Primary by Customer Relationship in the Edit Contact UI. This means the contact point has been designated the primary
means to communicate with this customer contact. Changes made here will be reflected in the Edit Contact: Profile page.

**Manage Contact Preference Information: Explained**

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

**Creating Contact Preference Information**

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

**Reviewing Contact Preference Information**

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

**Privileges Required for Managing Contact Restriction Information**

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

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

**Sales Account Team Member Access Levels: Explained**

There are three types of sales account team memberships known as access levels.
These access levels control the team member’s privileges for the sales account:

- View Only
- Edit
- Full

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

**View Only**

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

**Edit**

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

**Full**

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

**Third-Party Integrations in Oracle Sales Cloud Accounts and Contacts: Explained**

Oracle Sales Cloud accounts and contacts feature is a central location to access a comprehensive and multifaceted view of customer information. It unifies Oracle Sales Cloud data as well as relevant third-party content.
Third-Party Integrations in Accounts and Contacts

OneSource and Siebel Service are two third-party integrations readily configured in Oracle Sales Cloud. This topic explains how third-party customer content is mapped to Oracle Sales Cloud customers.

- **OneSource to Oracle Sales Cloud Mapping**

  OneSource, an online source of business and company data, can be accessed directly from the OneSource node in Oracle Sales Cloud Accounts and Contacts trees.

  Oracle Sales Cloud conducts searches for OneSource company data in the following order:
  
a. Look up based on mappings defined in `HZ_ORIG_SYS_REFERENCES` table where `orig_system` is `ONESOURCE`.
  
b. Look up based on Oracle Sales Cloud customer stock symbol. This is checked if mapping is not found in `HZ_ORG_SYS_REFERENCES`.
  
c. Look up based on Oracle Sales Cloud customer name. This is checked if mapping is not found by stock symbol lookup. If there are multiple OneSource companies match the Oracle Sales Cloud customer name, user can choose from the list of matching OneSource companies.

- **Siebel Service to Oracle Sales Cloud Mapping**

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

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**Note**

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

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

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**Manage Contact Preference Information: Explained**

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

**Creating Contact Preference information**

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

**Reviewing Contact Preference Information**

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

**Privileges Required for Managing Contact Restriction Information**

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

**FAQs for Maintain Customer Information**

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

Oracle Sales Cloud Work Management functionality is used to determine matching territories for a given account. An account can also be assigned to one or more internal and partner territories.

All internal territories, such as Prime, Overlay and Sales Channel Manager territories, which match a given account’s assignment attributes are assigned to the account. Internal territory assignment can be run immediately and automatically whenever account assignment or reassignment is required. For example, you can run the assignment engine when an account is created or updated, or when territories are realigned. Internal territory assignment can also be scheduled to run in a batch, or it can be run on-demand via the Assign Territories action in the account team page.
Partner territories are applicable to Oracle Sales Cloud partner management implementations. When a partner lead is approved, any partner territories associated to the lead are automatically assigned to the lead’s account. Channel sales managers can also select specific partner territories to assign to an sales via the Add Partner Territories action in the account team page.

**Note**

Territory Management must be implemented to utilize this feature.

**What's the difference between a primary contact, an overall primary contact point and a relationship associated primary contact?**

The primary contact point is the specific phone, e-mail, or other contact point that a contact prefers for communication. If there is only one contact point entry, it is the primary contact point. Contact points can have multiple entries and the primary contact point for a contact can be designated for each type of contact point the Edit Contact: Profile page. If there is a customer associated with the contact the primary contact point becomes the relationship-associated primary contact point.

An overall primary contact point is the first entry for each type of contact point for a contact. If no customer is associated with the contact, the primary contact point is the overall primary contact point.

A relationship-associated primary contact point is, by default, the first of multiple records for a contact's customer relationship. The primary can be changed in the Edit Customer: Contact page. Since the contact is related to a customer in this case, the relationship-associated primary contact is also the overall primary contact.

**How can I specify the customer relationships for my contact points?**

You can add customer relationships for a contact point in the Edit Contact: Profile page. To change the Customer Relationship for an existing contact point, add the contact point again for the relevant Customer Relationship. Delete the old contact point. To remove a customer relationship for an existing contact point, add the contact point again and leave Customer Relationship blank. Delete the old contact point.

When you drill into customer details to view the customer's contacts, the contact details show the contact points associated to the specific customer relationship. When you add a contact point here in customer details contacts node, the contact point is automatically associated to the current customer relationship.
How can I designate the Primary by Customer Relationship contact point?

Contact points are designated primary by customer relationship at the customer level. When a contact is added through the Edit Customer: Contact node of the Customer Information tree, a contact to customer relationship is established. Contact points that are marked primary here are seen in the Edit Contact: Profile pages and have a green check mark in the Primary by Customer column. You cannot edit the primary by customer relationship in the Edit Contact: Profile. You must make changes in the Edit Customer: Contact page.

For Example, you may have one or more contact points, such as phones and e-mails, relevant to the same customer relationship. In this example, a contact is related to customers Acme 1 and Acme 2. This contact has work phone 1 and mobile phone 1 in context of customer Acme 1, and work phone 2 and mobile phone 2 in context of customer Acme 2. You can designate work phone 1 as the primary contact point in context of customer Acme 1, and mobile 2 as the primary contact point in context of customer Acme 2.

How can I search for a contact who is not related to a customer?

Contacts who are not related to a customer are not included in the contacts search and cannot be selected or viewed. To enable search, select and view of the contact, you need to specify the customer for the contact.

How can I make merge requests?

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

How can I personalize account and contact trees?

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

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

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

Examples of two internal territories are:

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

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

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**Note**

Territory Management must be implemented to utilize this feature.

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**What Oracle RightNow CX customer data can I view in the customer center?**

Integration with the customer center allows you to view Oracle RightNow CX incident information as an Oracle Business Intelligence Enterprise Edition (OBIEE) report in the customer center. The incident report data includes the incident ID and reference number, subject, agent working the issue, severity, status, date created, and last updated date.

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**Note**

The information displayed is fully configurable, and can reflect any information that is available in the RightNow incident.

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**What happens when I delete an account?**

Sales administrators and other designated users (users granted the Delete Sales Party privilege) can delete accounts in Oracle Sales Cloud.

In general, when you delete an account:
• The account party status becomes inactive. The account record is not physically deleted from the database.

• The deleted account does not appear in account list, account search, account picker, account data quality match, segmentation, and recent items.

• The deleted account’s profile and children, such as attachments and notes, can no longer be viewed.

• The account’s contact relationships, if any, are deleted. The contact can still be viewed, but deleted contact relationships will not be shown in the contact.

• Deleting an account does not cascade delete account related objects such as opportunities, leads and tasks. You can still view related objects and the account name on these objects, but you can no longer access the deleted account’s details.

What happens when I delete a contact?

Sales administrators and other designated users (users granted the Delete Sales Party Contact privilege) can delete contacts in Oracle Sales Cloud.

In general, when you delete a contact:

• The entire person record of the contact is removed from Oracle Sales Cloud, including all profile data, customer usages, group memberships.

• Relationships with associated customers or sales accounts are deleted.

• Contact points or other child objects specific to the customer-contact relationship won’t be viewable.

• A deleted contact won’t be viewable or available in any other contact or customer lists, regardless of the contact type (standalone, single, or multiple) customer-contact, or a consumer or prospect, or in cases where the contact is both a customer contact and a consumer or prospect.

• Even if you have the functional privilege to delete a contact, you can’t delete a contact if you don’t have full or edit access to at least one of the sales accounts associated to the contact. If you try, you see a ‘You do not have permission to delete this contact because the contact is associated to customer {customer names}’ error message.

What happens when I delete a household?

Sales administrators and other designated users can delete households in Oracle Sales Cloud.

In general, when you delete a household:
• Association with members of the household is severed, but the members can still be viewable as individual organizations or contacts.

• Contact points for the household won't be viewable.

• A deleted household won't be viewable or available in any other contact or customer lists.
How Lead Components Fit Together

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

**Leads Lifecycle**

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

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

**Lead Generation**

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

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

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

**Lead Qualification**

Marketing departments help with the lead qualification process to ensure that only qualified leads are handed over to sales. Leads are typically ranked as Hot, Warm, or Cool. Leads are further qualified by the use of company specific...
standard questions to score a lead. Lead scores are numeric values typically ranging from 1 to 100, where a high score represents high quality.

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

**Lead Distribution**

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

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

**Lead Assessment**

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

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

Lead Assessment enables leads to be further assessed through predefined questions that help determine the likelihood of the lead being accepted by Sales. In this scenario, a salesperson named Mike begins asking the customer a series of questions created by Marketing and Sales to assess the quality of the lead. As each question is asked, Mike records the answer and the lead assessment tool automatically factors the answer into the assessment score of the lead. At the end of the call, Mike notes that the assessment lead score is high. He requests the lead be assigned to the direct sales team for that customer. If the lead score was low, then Mike could retire the lead, or if the lead needed further qualifying, he could leave it in his list of leads for follow-up at a later date. If the lead is good, but the potential revenue opportunity is less than a predetermined monetary amount, for example, twenty-five thousand dollars, then Mike can convert the lead to an opportunity that he works himself.
Lead Conversion
A lead’s life cycle ends either when a lead is converted to a sales opportunity, or when the lead is retired. Conversion to an opportunity stage allows the salesperson to pursue the account in the sales cycle. After establishing that the lead has potential, the salesperson converts the lead to an opportunity. Contact is established and meetings and presentations are scheduled to move the opportunity along the sales pipeline. To track the progress, contact notes are captured as interactions and associated with the contact and opportunity. As the lead progresses through its life cycle, decisions to retire the lead are based on the following.
- You cannot verify customer and lead details
- The customer is not interested in pursuing the lead any further

Lead Actions: Explained

Use the lead actions to manage the lead.
Lead actions are generally grouped into the following categories:
- Standard create, edit, delete, and export functions
- Ranking, scoring, and qualifying actions to assist in prioritizing leads
- Accepting, rejecting, reassigning, and retiring actions to ensure leads are in the right queue for pursuing
- Submitting lead registrations for approval and converting leads to opportunities to continue sales pursuits and include in sales forecasting

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

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

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rank</td>
<td>Submits the Request Sales Lead Assignments process to automatically assign a lead rank value based on the predefined rules that are grouped and specified on the Assignment Rule for Ranking Leads profile option. A rank represents the priority of the lead, such as Hot, Medium, and Cool.</td>
</tr>
<tr>
<td>Score</td>
<td>Submits the Request Sales Lead Assignments process to automatically assign a lead score value based on the predefined rules that are grouped and specified on the Assignment Rule for Scoring Leads profile option. Different from the qualification and assessment scores, this score value can be used as a source for predefined rules for the automated assignment of lead rank, qualification status, territories, and resources. The assignment of these other objects are separate actions.</td>
</tr>
<tr>
<td>Qualify</td>
<td>Updates the lead status to Qualified, by-passing the automated sales lead classification process.</td>
</tr>
<tr>
<td>Action</td>
<td>Description</td>
</tr>
<tr>
<td>--------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| Reassign | Provides two choices for when the sales lead assignment process will evaluate the lead to automatically reassign sales team members and territories to the lead:  
  - **Automatic assignment**  
    The lead is eligible for reassignment when the next scheduled Sales Lead Processing Activity submits the Request Sales Lead Assignments process and the lead meets the processing activity's selection criteria.  
  - **Immediate automatic assignment**  
    The Request Sales Lead Assignments process is immediately submitted to re-evaluate the lead.  

The manual assignment option updates the lead owner to the specific resource selected from a list. The Reassign action is available for leads with a status of Qualified or Unqualified. |
| Retire | Updates the lead status to a retired lead indicating the lead is no longer one that needs pursuing. |
| Reject | Removes you as the lead owner. The accepted indicator and assignment status are also updated to reflect that the lead is no longer accepted. The lead is eligible for reassignment when the next scheduled Sales Lead Processing Activity submits the Request Sales Lead Assignments process and the lead meets the processing activity's selection criteria, excluding the last lead owner when assigning new team resources.  

The reject reason and number of times the lead is rejected are available for searching leads and is displayed in the Overview page for analysis and possible indicators that the lead should be retired. |
| Accept Lead | Updates the lead with you as the owner. The Request Sales Lead Assignments process is submitted to automatically assign sales team territories and resources based on the predefined rules that are grouped and specified on the Assignment Rule for Ranking Leads profile option. |
| Convert To Opportunity | Creates an opportunity based on lead information. The lead status is updated to converted. |
| Submit for Approval | Click Submit for Approval when you are ready to register the lead for the approval of a channel account manager. |

**Lead Statuses: Explained**

The status of a lead is primarily determined by a user performing an action on a lead, or upon successful completion of the lead qualification activity.
Once leads have been assigned to lead qualifiers or related sales roles, lead follow-up activities begin. As specific actions are performed on a lead, the status of the lead changes accordingly.

**Lead Status**
The following table describes the status of leads:

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

**Lead Qualification: Explained**

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

What constitutes a qualified lead varies from company to company.

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

**Additional Lead Qualification**
In other companies, a lead qualification questionnaire score is a factor used by the lead qualifier or salesperson to decide to manually set the lead to a Qualified
status using the lead actions menu. Your application administrator assigns the questionnaire to your Lead Qualification Template profile. The answers entered are assessed using a weighted scoring model with instant feedback available via a status bar.

**Qualifying Leads: Examples**

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

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

**Rule-Based Lead Qualification**

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

\[
\text{IF budget status is approved AND timeframe is 3 months AND decision maker has been identified AND response type is attended event THEN rule is passed ELSE rule is failed.}
\]

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

**Internal Marketing Qualification**

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

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

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

A lead can be qualified when the basic attributes of the lead indicate interest in the purchase of a product. For example, basic attributes might include:
• Contact attended a product event
• Budget is approved
• Purchase time frame is less than a year

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

**Internal Sales Group Qualification**

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

**External Third-Party Qualification**

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

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

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

Resources who access leads have different roles as follows:

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

This topic explains:

- Lead, Sales, and Territory Resources
- Assignment of Leads to Marketing and Sales Resources
• Sales Resource Role
• Resource Privileges and Access Levels

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

Assignment of Leads to Marketing and Sales Resources
Qualified leads are assigned to a sales team based on sales territories. Unqualified leads are assigned to individual lead qualifiers either manually or based on rules defined in the assignment manager engine.

Sales Resource Role
The sales resource performs the following activities:

• Review quality leads which are augmented with sales collateral, marketing content, customer contact interactions, and references.
• Qualify and assess the lead quality further with the help of customized assessment templates.
• Use the resource picker to manually select a resource to add to the team. Include a description to indicate what role the resource has on the sales team. Many sales team members can access each lead, and each team member is identified as either an internal (sales force), or an external (channel partner sales force) resource. Each sales team member can be associated with a specific resource role to indicate what capacity the member has on the lead.
• Add additional contacts and products to the lead as the lead moves further down the sales cycle.

Resource Privileges and Access Levels
Leads have three levels of access as follows:

<table>
<thead>
<tr>
<th>Access</th>
<th>Privilege</th>
</tr>
</thead>
<tbody>
<tr>
<td>Full</td>
<td>Read and update the lead and all child objects of the lead. Full access level allows you to update the sales lead team by adding or removing individual resources, or by updating the access level for any member.</td>
</tr>
<tr>
<td>View Only</td>
<td>View the lead and add lead notes. View the sales account associated with the lead, but no other leads or opportunities associated with the sales account. The View Only privilege also allows you to view most of the lead tabs.</td>
</tr>
<tr>
<td>Edit</td>
<td>Update all data on the lead except for Lead Team membership data and Lead Owner data.</td>
</tr>
</tbody>
</table>
When the lead does not have any owner, you must Accept the lead which makes you the lead owner. Only the lead owner and the management chain of the lead owner can change the lead owner.

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

Sales Team Examples

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

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

Automate assignment of territories to lead territory team

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

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

Automate assignment of individual salespersons to sales team

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

Add ad hoc members to sales team

Generally, sales team resources are automatically assigned to leads based on configured assignment rules. The following scenarios provide examples for when you may want to manually add additional team members to assist with the lead.

The lead owner, who has full access to the XYZ lead, wants to add one of his company’s contractual experts to his team to help pursue the lead. The lead owner manually invokes a resource picker and selects the ad hoc resource that he wants to add to his team.
When pursuing a lead for an insurance policy, the customer contact requests a unique and complex combination of policy components that require an expert in the company to review. The lead owner adds the expert resource to the lead with full access so they can update the lead with valid combinations of products and services, and, if required, add more team members to the team.

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

**Update access rights based on the resource**

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

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

**Change the lead owner**

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

**FAQs for Follow Up Leads**

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

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

<table>
<thead>
<tr>
<th>A response is ...</th>
<th>A lead is ...</th>
<th>An opportunity is ...</th>
</tr>
</thead>
<tbody>
<tr>
<td>An interaction initiated by the customer in response to a marketing stimulus. Every outbound marketing activity is a marketing stimulus.</td>
<td>An inquiry, referral, or other information, obtained through marketing campaigns or other means, that identifies a potential contact or prospect and specific purchase interest.</td>
<td>A pending sale of a product or service that can be forecasted and tracked using summary data such as potential revenue, sales stage, win probability, and expected close date.</td>
</tr>
</tbody>
</table>

**Note**

A lead can also be created even if the specific purchase interest is not known at the time of lead creation. However, for this lead to get qualified, it is necessary to record a primary purchase interest.
Follow Up Leads

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

**Why did the deal size change?**

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

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

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

From the Overview list of leads, select the lead you want. From the Lead Details, click the Contacts tab. Select the contacts that you want to add to your sales campaign. From the Actions menu, select Add to Sales Campaigns to view and select from your saved campaigns. Your contacts are notified either when you launch your sales campaign or at the next scheduled mailing if you scheduled your sales campaign to repeat.

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

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

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

When does an interaction display for my lead?

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

Why did customer reference display for my lead?

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

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

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

You convert a lead to an opportunity when the lead is qualified and is ready for sales engagement. A lead must be associated with a sales account and must have a primary product associated with it before you can convert it to an opportunity. Once the conversion is successfully completed, you can review the newly created opportunity using the opportunity management capability. During your review, you might need to retain only a select few lead product lines to pursue as opportunity revenue line items. Since the conversion process automatically creates the revenue lines from all lead lines, you can remove unwanted revenue lines from the Opportunity details page.

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

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

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

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

Yes, you can convert the same lead again into another opportunity and then delete unwanted revenue lines. For example, during your review of an opportunity that was created from a lead conversion, you might need to retain only a select few lead product lines to pursue as opportunity revenue line items. Since the conversion process automatically creates the revenue lines from all lead lines, you can remove unwanted revenue lines from the Opportunity details page. You can, at a later stage, create another opportunity from the removed lead revenue lines by converting the lead to an opportunity again and then by keeping only those revenue lines on the new opportunity.
**Why can't I see converted leads in my list of opportunities?**

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

**What happens if a lead contact is not associated to a customer?**

A sales lead cannot be converted to an opportunity or submitted for approval if the primary contact on the lead is not associated to a customer. An error message prompts that the lead cannot be converted or submitted because the primary contact is not associated to any customer.

In addition, if any of the nonprimary contacts are not related to a customer when converting a lead, a warning message is displayed indicating that the nonrelated contacts will not be transferred to the converted opportunity. If you select yes, the lead conversion process resumes but the nonrelated contacts are not carried over to the opportunity. If you select no, then no action is taken.
Managing Multiple Interactions: Explained

With Oracle Sales Cloud CTI integration, you can maintain and switch between up to four interactions at a time. These interactions can include any combination of online chats and phone calls.

Handling Multiple Chat Sessions

You can easily switch between multiple chat sessions. Your toolbar displays each chat session (up to 4), with a notification on your toolbar.

Icons on each chat session provide an easy way to determine status:

- A small yellow star on a chat icon in the toolbar indicates that it is a new chat interaction. Click the icon to accept the chat and open its chat client window.
- A red circle on the toolbar chat icon of a session that isn’t currently active indicates that the contact has added a new chat message.
- In the currently active chat session, you can click the icons to pause, end the session, or transfer it to another agent.
- If you have more than one chat active and you end one, the first chat to its left (if there is one) becomes the new active chat.
- If at least one chat is available, there will always be an active chat.

Handling Multiple Phone Calls

The number of phone calls is dependent upon your underlying CTI connector, limited to a maximum of four total interactions for both voice and chat.

If there is an active phone call, you cannot initiate any new outbound phone calls. You can switch between active phone calls, but switching does not control which line is active. You must use your Hold and Retrieve buttons to place callers on hold and switch between active lines.
Handling Mixed Interactions

Your maximum of four interactions can include both phone calls and chat sessions. Icons for each interaction type appear in your Toolbar.

To switch between these, click the icon for the interaction you want to make active. If the interaction is a chat session, its client window is displayed and it becomes the active chat session. If the interaction is a phone call, you must still use your phone’s Retrieve button to make the call active; switching between phone calls does not affect their active status.

Managing Chats: Explained

With Oracle Sales Cloud CTI integration, you can have up to four interactions (chats or phone calls) at the same time, switching between them to define the active interaction.

This topic describes the following:

- Accepting an inbound chat
- Rejecting an inbound chat
- Transferring a chat

Accepting an Inbound Chat

When you receive an incoming chat, a visual indicator appears on the toolbar. Depending on your computer-telephony interface and how your system is set up, you might also hear an audio tone. During the course of the chat, a red circle appears on the chat icon to indicate that a new chat message has been received and it is active.

To accept an incoming chat:

1. Click the **Accept** button on the toolbar.
   
   The toolbar chat region changes from the alert color to the active color, and chat action buttons replace the Accept and Reject buttons. The chat client window opens, displaying the contact’s information in the contact section of the chat frame. If you’ve checked the Navigation button on the toolbar, the screen pop is performed on the main application window.

2. Click the Snapshot icon in the toolbar chat interaction region to display the chat data in a dialog box under the chat interaction region. You can dismiss this dialog box by clicking anywhere.

3. Enter a message to the customer in the chat client window, then press Enter to submit the message.

You can end the chat by clicking the **End** button on the toolbar or on the chat client. Before finishing the interaction, you can verify that the interaction was recorded correctly by checking the following:
- The type is Chat
- The direction is Inbound
- The start and end times are valid
- The Contact and Customer are recorded correctly

**Rejecting an Inbound Chat**

If you receive an inbound chat that you do not want to accept, click the **Reject** button on the toolbar.

The toolbar chat interaction region will disappear. Depending on your system, the status might go back to Available automatically, or you might have to reset it to Available.

**Transferring a Chat**

In some cases (for example, if you have too many other active chats or if another agent has more expertise about a particular customer issue), you might want to transfer a chat to another agent.

To do this:

1. Make sure the chat you want to transfer is the active chat, and that the agent you want to transfer it to is available for incoming chats.
2. Click the **Transfer** button on the toolbar chat interaction region to open the transfer window.
3. Select the agent you want to transfer the chat to from the available list.
4. Enter a transfer note to explain to the agent why you are transferring the chat.
5. Click the **Transfer** button to transfer the chat.
6. After you transfer the chat, the interaction ends. If your ACD/chat server is configured to do so, you are placed in wrap-up mode, which displays the Interaction dialog where you can click **Save and End Wrap Up**. If your server is not configured in this way, the interaction ends at this point.

At this point, your status returns to Available, a new chat interaction pops up on the transferee’s toolbar, and the transfer note you entered will be displayed in a separate window on the transferee’s screen. They can dismiss the note by clicking **OK**.

If you have a new chat interaction available, you can now accept it.

**FAQs for Define Enhanced Click-to-Dial**

**What happens if I get another call when connected to another customer?**

Nothing happens. Oracle Sales Cloud CTI supports a single phone line.
What happens if I get an incoming call and I don't want my display to change?

Select the No radio button for Contextual Navigation on the Oracle Sales Cloud Computer Telephony Integration (CTI) toolbar.

How can I update several agent connector records at once?

In Setup and Maintenance, the Manage Agent Connector Settings task has a Mass Update feature that enables you to modify the Agent Group, Agent Password, Agent ID, and Connector for multiple agent connector records. Select the records to change and click the Mass Update button to select the type of change, or changes, you want to make. When you click Save and Close in the Mass Update popup window, the changes are committed in the database. Clicking the Cancel Button on the Manage Connector Settings page will not roll them back.

How can I indicate that I am on a break?

Your administrator has configured your system with the break codes appropriate for your organization. To indicate that you’re on a break, select a break type from the available list in the Status area in the upper left corner of your window. Only break types appropriate for your current status appear on the list.

Depending on your computer-telephony (CT) connector configuration and on how your break codes are set up, your break status might not immediately change when you select it if you’re busy with a customer interaction. When you complete the interaction, your status will show that you’re on break and no new interactions will be sent to you. Some sites might restrict breaks when the site is too busy.

What’s Contextual Navigation?

Contextual Navigation is a feature of Enhanced Click-to-Dial that will display a caller appropriate application page based upon a set of navigation rules defined for your customer when you answer your phone. For example, if a customer is calling, contextual navigation rules can determine the contact name or customer ID. Contextual navigation rules determine which navigation/application page to be displayed based on the available call data. The launched page displays the information based on parameters passed in the task flow that is used to launch the page.
Assess Opportunities and Leads

Assessment Templates: Points to Consider

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

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

Ratings

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

Questions, Question Groups, and Question Weights

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

Responses and Scores

Responses are attached to questions in the template. Each question should have at least two responses, unless it’s a free-form only question. More than one response can be tied to the same rating but, between all of its responses, each question should accommodate at least two ratings, unless it’s a free-form only question. For example, if your ratings are Excellent, Average, or Poor you may, for each question, include two responses that correspond to at least one of those ratings, such as average. There must be enough responses to cover at least two of the ratings such as Excellent and Average. You assign a score to each response for a question, and the application normalizes the score based on a standard scoring scale. When an assessment template is used to perform an assessment, a question’s weight is multiplied by the normalized score of the response given for the question to produce a weighted score for that response. When adding responses to questions, ensure that the scores and ratings you assign to each response correlate. In other words, the higher the score you assign to the response, the higher the rating should be so that you have a strong quantitative relationship between the two. Also note that you can allow free-form responses for one or more questions in the template, but free-form responses are never scored.

Associated Task Templates

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

Assessment Template Score Range: How It's Calculated

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

Settings That Affect Score Range

In order for the application to calculate the assessment template score range, you must:
• Apply weights to all template questions.
• Configure ratings and apply them to possible responses for all template questions.
• Apply a score to each of the possible responses for all template questions.

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

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

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

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

<table>
<thead>
<tr>
<th>Rating</th>
<th>Score Range</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>65 - 100</td>
</tr>
<tr>
<td>Average</td>
<td>46 - 64</td>
</tr>
<tr>
<td>Poor</td>
<td>0 - 45</td>
</tr>
</tbody>
</table>

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

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

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

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

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

**Response Score**
A response score is the score assigned to a possible response to a question in the template. The template administrator sets response scores with no upper or lower bounds, and each score is normalized in order to accurately score
an assessment that uses the template. The response scores are normalized by assigning a score of 100 to the highest response score, and then all other responses are assigned a normalized score relative to that highest score. When an assessment template is used to perform an assessment, the normalized score of the response given for the question is multiplied by the question’s weight to produce a weighted score for that response.

**Response Rating**

A response rating is the rating assigned to a possible response to a question in the template. A rating is a textual qualification like Excellent or Poor that provides a metric other than a numerical score for qualifying the outcome of an assessment. A response rating is directly related to a response score, and this relationship should ensure that a higher score will translate to a higher rating. Early in the template creation process, the administrator configures ratings to assign to responses. The administrator then assigns scores and ratings to responses, and the system calculates score ranges based on those entries. Each rating is assigned to a score range, and the administrator is given the opportunity to apply feedback text to the rating-score range combination. When an assessment template is used to perform an assessment, the weighted scores from all responses are added to determine the total assessment score. That score will fall somewhere within the calculated score ranges, which then determines which rating is assigned to the assessment and what feedback text to display. The maximum total assessment score is 100.

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

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

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

Task Template

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

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

Assessment Template Status Codes: Explained

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

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

- **In Progress**
- **Active**
- **Retired**

In Progress

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

Active

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

**Retired**

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

**Lead Assessments: Explained**

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

Using lead assessments, you can:

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

**Define Lead Assessments Templates**

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

**Associate Task Templates to Assessment Templates**

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

**Assess Leads**

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

- Perform New Assessments
FAQs for Assess Opportunities and Leads

What's a Question Group?

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

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

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

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

Why am I being asked to enter question weights again?

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

What are task templates?

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

What are assessment templates?

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

Opportunities allow organizations to support the full sales process, from leads, to opportunities, to sales, to follow-up analytics.

Summary of Features

Opportunity features include the following:

- Sales Lifecycle Support: Sales teams create and manage opportunities, supporting the entire sales lifecycle.

- Opportunity Information: Following are just some of the data that sales teams can capture for an opportunity:
  - Sales Accounts: You can associate the customer on the deal with the sales account on the opportunity.
  - Opportunity Owner: The person who creates an opportunity is automatically assigned as the owner of the opportunity and has full access to the opportunity.
  - Contacts: You can associate existing or new contacts with opportunities. In addition, you can specify a contact’s role, affinity, and influence level on an opportunity. A single contact can be marked as primary.
  - Currency: The application supports all of the currencies you have set up in the general ledger that have conversion rates against the corporate currency, at both the opportunity header and revenue-line levels.
  - Budget: A Budgeted indicator lets you display whether the opportunity revenue amount has been budgeted by the customer as well as the date that the budget was made available.
  - Competitors and Partners: You can pick from lists of values and associate partners and competitors with opportunities. Competitors and partners can be chosen at the revenue-line level as well.
• Marketing Data: The Source field allows the association of sales campaigns with an opportunity.

• References: Reference customers can be associated with opportunities to improve the selling process.

• Sales Methodology: Administrators can set up multiple process steps, task templates, recommended documents, assessment templates, and required fields by sales stage. In addition, administrators can specify a different default win probability percentage for each sales stage.

• Sales Coach: Sales Coach guides salespeople through each step of the sales cycle with an organization’s own sales methodology and best practices. The process steps, task templates, recommended documents, assessment templates, and mandatory fields set up by your administrator in each of the sales stages translate into guide notes and appropriate opportunity UI interactions.

• Revenue Model: Opportunities support a revenue model that features revenue-based forecasting, products and product groups, as well as revenue data captured at the line level, such as win probability, close date, include in forecast, and status. See the topic, Sales Revenue: Overview for more information.

• Sales Team Assignment: Opportunities align with territories and the assignment engine for rule-based or territory-based autoassignment of opportunities. Additionally, salespersons can manually add sales team members to an opportunity or add recommended resources.

• Sales Credit Allocation: Sales credits on the revenue line provide a mechanism to capture the salespeople responsible for contributing to the sale of the specific product, and the forecast territory that the revenue rolls up to. Support is provided to track direct, channel, and overlay resources and their contributions by means of revenue and nonrevenue credit splits. After territory-based assignment assigns territories to matching revenue lines, the application sets a default forecast territory for each of the sales credit lines.

• Forecasting Integration: Opportunity forecast integration features include utilizing forecast criteria that were set up by the administrator to automatically include revenue lines in the forecast. The forecast is refreshed in real-time from revenue when an opportunity is created or updated.

• Assessments: Assessments allow the evaluation of a business object, such as an opportunity, customer, or competitor. After setup by the administrator, assessments are presented as either mandatory or optional for salespeople.

**Sales Methods, Sales Stages, and Sales Coach: Overview**

Sales methods and sales stages let deploying organizations present the sales methodology that best aligns with an opportunity. In addition, the elements of the Sales Coach, set up within sales stages, can be used along with the sales
methodology as both a teaching tool and a method to push the organization’s best practice information to salespeople.

**Sales Methods and Sales Stages**

Sales methods link strategy to execution. For example, is the customer more interested in price, features, service, or delivery time? When this decision is made, then the sales method and sales stages can reflect this component. For example, a sales methodology for a price customer will be different for a customer who is interested in features. A sales method can encompass all activities associated with the different sales stages during the sales process, from qualifying, to negotiating, to closing.

**Sales Coach**

Sales Coach is a virtual coach available to salespeople while they view or edit an opportunity. The following coaching tools are available in the sales coach:

- **Process Steps**: Process steps guide a salesperson through an organization’s sales best-practice processes for a particular sales stage.
- **Recommended Documents**: Recommended documents, such as customer letter templates, relevant Web sites, and training materials, provide coaching strategies and best-practice information.
- **Task Templates**: Task templates provide a list of required or recommended tasks relevant to a particular sales stage. Recommended task templates are optional. Autogenerated task templates are automatically applied to your list of tasks for a particular sales stage, when the opportunity moves to that stage.
- **Assessment Templates**: Assessment templates enable the analysis and scoring of an opportunity object, such as a product, a competitor, or an opportunity overall. After selecting an assessment type, you enter a series of responses to achieve a weighted score. This score then helps determine the success rate of the opportunity.
- **Required Fields**: For each sales stage, the administrator can specify the fields in the opportunity header that you must enter before the opportunity can progress to the next sales stage.

**Sales Stages: Explained**

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

**Sales Stage Attributes**

When setting up the sales stage, sales administrators typically define the following attributes:
Sales Methods and Sales Stages: How They Fit Together

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

Sales Methods

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

Sales Stages

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

Sales Coach: Explained

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

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

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

**Process Steps**

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

**Recommended Documents**

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

**Task Templates**

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

**Assessment Templates**

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

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

**Required Fields**

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

**Default Sales Channel in Opportunities: Explained**

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

Sales Channel Support

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

Default Sales Channel During Opportunity Creation

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

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

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

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

Default Sales Channel During Revenue Line Creation

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

Synchronization Between Opportunity and Revenue Line Sales Channel

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

If the salesperson changes the header-level sales channel value, all revenue lines that have the same sales channel value as the header and the same status category as the header are synchronized to the new value. For example, if the
header-level opportunity status is Open and the sales channel is Direct, and the salesperson changes it to Indirect, all Open revenue lines that have a Direct sales channel will automatically be changed to Indirect. Revenue lines that do not match these criteria remain unchanged.

Closing an Opportunity: Explained

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

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

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

There are three ways to close an opportunity:

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

Benefits of a Dedicated Close Opportunity Flow: Explained

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

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

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

Closing an Opportunity Using the Close Opportunity UI: Explained

When salespeople start the process of closing an opportunity, they must review a summary screen and enter information about the opportunity prior to closing it. The summary screen allows the representatives to enter last-minute changes to the opportunity header and revenue items before submitting the opportunity to the close process. The summary screen follows specific behavior, as noted in this topic.

**Note**

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

- Except for the competitor fields in the revenue items, all applicable fields (including status codes) and their corresponding states in the edit opportunity page are carried over close opportunity page. For example, if a salesperson has changed the state to a closed category in the edit opportunity page, and the win/loss reason fields are enabled, these changes are carried over to the close opportunity page as well. If the status in the original page is Open, the same status is carried over to the summary screen when the close opportunity UI is invoked.

- If there is at least one competitor at the opportunity level, the primary competitor from the opportunity header is propagated to all revenue items without competitors. If the salesperson changes the primary competitor on the close opportunity page, the application does not propagate the new primary competitor to the in-sync revenue lines.

- If a salesperson cancels changes from the close opportunity page, the application navigates back to the edit opportunity page, erasing any changes made on the close opportunity page. Pending changes on the edit opportunity page are left pending, including the status that was last set on the edit opportunity page.

- After successfully validating and closing the opportunity (using the confirmation action on the close opportunity page), the application
navigates the salesperson to the edit opportunity page, where he must click Save or Save and Close to process all opportunity closing validations and commit the close opportunity related changes.

**Close Opportunity Page Transaction Management**

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

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

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

**Validations and Synchronization Behavior**

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

**Close Opportunity Page Save and Cancel Behavior: Explained**

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

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

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

- Selecting the Ok button on the close opportunity page preserves unsaved changes made after entering the close opportunity page and returns control to the edit opportunity page without saving them. A subsequent save action on the edit opportunity page is required to commit changes made on both the edit opportunity and close opportunity pages.
Closing an Opportunity Using Edit Opportunity UI: Explained

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

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

- The win/loss reason for the opportunity and the revenue items becomes enabled. The salesperson can set the win/loss reasons individually at the revenue item level, or he can change the opportunity header win/loss reason. Once the salesperson enters the win/loss reason at the header level, the reason is propagated to all revenue items without a win/loss reason.

- The salesperson is expected to add competitors to the opportunity both at the header and revenue item levels, if he has not already done so.

- The salesperson selects Save or Save and Close, which kicks off a series of opportunity closing validations before committing the transaction.

Validations and Synchronization Behavior

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

Exceptions

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

- An update to an opportunity win/loss reason does not result in propagation of the update to all of the opportunity’s revenue lines where the win/loss reason attribute is in sync.

- As long as the opportunity primary competitor is defined, an update to the opportunity status from an open status to a closed status does not update the revenue line competitor attribute for opportunity revenue lines where the competitor attribute is undefined.

Closing Multiple Opportunities Using Mass Update Opportunities UI: Explained

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

**Validations**

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

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

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

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

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

**Synchronization Behavior**

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

**Exceptions**

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

- When an opportunity with one or more revenue lines in a closed status is saved, a validation check may fail because a revenue line competitor
attribute is undefined. When opportunity save validation fails for this reason, if the opportunity primary competitor is defined, the error dialog that appears will offer the user an option to correct the validation failure by copying the opportunity primary competitor to all of the revenue lines having undefined competitor attributes. This behavior applies to both edit opportunity and close opportunity flows.

- The behavior does not apply to the mass update opportunities and flow. A validation failure due to missing required revenue line competitor attributes will result in an error message with no options to correct the validation failure.

Summary of Mass Update Opportunities Business Logic

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

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

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

<table>
<thead>
<tr>
<th>Change in Opportunity Status</th>
<th>Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>To won</td>
<td>Set sales stage to last stage of sales method. Set win probability to 100 percent.</td>
</tr>
<tr>
<td>To lost or no sale</td>
<td>Set close date to current date.</td>
</tr>
</tbody>
</table>
| From open to closed          | • Enable win/loss reason.  
                              | • Copy primary competitor to revenue line where competitor is undefined.  
                              | • Set actual close date to system timestamp. |
| From closed to open          | • Disable win/loss reason. Set win/loss reason to undefined.  
                              | • Set actual close date to undefined. |

<table>
<thead>
<tr>
<th>Object to Validate</th>
<th>Validation Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competitor</td>
<td>If the profile option, Close Opportunity Competitor Requirement, is enabled, require competitor on opportunity and revenue line.</td>
</tr>
<tr>
<td>Win/loss reason</td>
<td>If the profile option, Close Opportunity Win/Loss Reason Requirement, is enabled, require win/loss reason on opportunity and revenue line.</td>
</tr>
</tbody>
</table>
FAQs for Manage Opportunities

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

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

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

Which fields or data are initially defaulted on an opportunity?

Several fields are initially set to default values when you create an opportunity, as described in this topic.

Following are the fields initially set to default values when you create an opportunity:

- Sales Channel: Set to Direct
- Currency: Determined by user preference
- Win Probability: Set to percentage determined by sales method or profile option
- Close Date: Set to 90 days from creation date
- Status: Set to Open
- Sales Method: Set to default sales method
- Sales Stage: Set to first sales stage in default sales method
- Owner: Set to user creating opportunity
- Revenue: Set to zero
- Worst Case: Set to zero
- Best Case: Set to zero
- Opportunity Number: Unique, application-generated number
- Created By: Set to user creating opportunity
- Creation Date: Set to current date
• Include in Forecast: Based on forecast settings

**What information is required to create an opportunity?**

Opportunity Name is the only field required to be filled out when creating an opportunity. Note, however, that the name and sales account combination must be unique. In other words, you cannot have two opportunities with exactly the same name and associated to the same sales account.

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

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

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

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

**How do territories get assigned to an opportunity?**

You can't explicitly add territories to an opportunity. Rather, the assignment engine automatically assigns territories to opportunity revenue lines by matching the dimensional attributes of revenue lines to territory dimensions, such as Customer Size or Industry.

To assign territories to an opportunity, administrators can schedule the batch process, Run Revenue Territory Assignment. Or sales users can use the assign opportunity action from within an opportunity. Note that the profile option, Opportunity Assignment Mode, must be set to run territory-based assignment when using these options. If the profile option, Assignment Submission at Save Enabled, is set to yes, the application may also assign territories to an opportunity every time the record is saved.

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**Note**

With partner integration, partner territories (territories whose sales channel dimension is equal to Partner) are not assigned to revenue lines. Partner organizations can only be associated with an opportunity manually, or they can be automatically associated through an approved lead registration.
Why can't I create an opportunity using a sales prospect?

Opportunities must be associated with a sales account with a sell-to address, since otherwise, territory-based assignment cannot happen for the opportunity. Territory-based assignment is the main assignment type for opportunities and drives important visibility rules into who can see and access an opportunity.

How can I copy an opportunity?

While viewing the list of opportunities, select an opportunity and click the button to copy the opportunity. The application will prompt you to enter a new, unique name for the opportunity.

In the dialog where you enter a name for the newly copied opportunity, you get the option of saving and editing or saving and closing the opportunity. When you save and edit, the newly copied opportunity displays in edit mode. When you save and close, the newly copied opportunity displays in the opportunity list view, irrespective of the search criteria being used on the list view.

What is copied when I copy an opportunity?

The following items are copied when you copy an opportunity:

- Opportunity header attributes
- Contacts
- Revenue items
- Sales team, including partner resources
- Sales credits, including recipients, amounts, and percentages; allocation style is set to ad hoc
- Source
- Partners
- References
- Competitors
- Leads
- Territory information
- Custom attributes on the opportunity
- Custom attributes of revenue
- Custom child objects of the opportunity
- Custom child objects of revenue
The following are not copied:
- Recurring revenue items
- Notes
- Tasks
- Appointments
- Interactions
- Assessments
- Attachments
- Deal registrations

**What's lock assignment?**

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

**What's deal protection?**

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

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

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

**What are recommended documents?**

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

**What's a process step?**

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

**What's a key internal sponsor on an opportunity?**

Key internal sponsor is a strong internal supporter of the opportunity in the deploying organization. For example, there may be certain deals that senior management wants to assign extra manpower to support because of the criticalness of the deal. This senior support and extra manpower is considered a strong internal sponsor.

**What's a billing account on an opportunity?**

A billing account on an opportunity is the customer’s financial account entity to be used for the transaction.

**What opportunity data can I view for accounts in Oracle RightNow CX?**

Integration with Oracle Sales Cloud gives you a read-only view of opportunities in the form of an Oracle Business Intelligence Enterprise Edition (OBIEE) opportunity report that displays on an Oracle RightNow CX workspace. Opportunity data displayed includes: opportunity name, status, and salesperson and salesperson contact information for the opportunity.

**Note**

The data displayed in the opportunity report can be configured through the cloud, so deploying companies can choose what data they wish to display to the service team.
Manage Sales Revenue

Sales Revenue: Overview

Sales revenue reflects the potential income of a company. Companies use opportunity revenue data to analyze their sales pipelines and win/loss trends, manage the performance of their resources, and generate revenue forecasts.

Summary of Features
The key features of managing sales revenue include the following:

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

Revenue Line Items: Explained

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

Revenue line items are comprised of key attributes:

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

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

Revenue Item Pricing Fields

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

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

Working with Opportunity Revenue: Explained

Opportunity functionality provides a robust interface that allows sales personnel to add, manage, and track sales revenue. This topic discusses the main features of the revenue region in opportunities.

Using the Revenue Region

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

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

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

Product Selection

Product selection in opportunities enables you to pick the most appropriate product for the customer.

In opportunities, you choose products (revenue items) using one of two methods:

• Product or product group selector: When you know the exact product to sell, select the product using the product selector. If you don’t know the exact product to sell, select a product group using the product group selector, without selecting a product. You can search for products based on product name and description. You can drill down on a product name to view additional information about a product. By default, the product group selector displays the same set of product groups available in the sales catalog.

• Sales catalog: In addition, you can browse the sales catalog to learn product details, search for products, or compare products. For more information on the sales catalog, see help topics for sales catalog.

All of the product selection mechanisms listed here are integrated with eligibility rules, if implemented. Eligibility rules ensure that sales personnel only offer the products that the customer is eligible to purchase.
Specifying a product on a revenue item is optional. During an early sales stage, you may not know the exact product to sell. However, you must specify either the product or the product group on a revenue line. You can’t, however, add both a product and a product group on a single revenue line.

**Adding Multiple Products at Once**

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

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

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

**Entering Quantity, Estimated Price, and Revenue**

You can enter the quantity, estimated price (also known as unit price), or revenue amount for a revenue line. For automatic pricing, companies can integrate with an external pricing system.

The application determines the revenue amount by multiplying estimated price by quantity. You can change the default revenue amount; when you do, the application does not update the quantity or estimated price for the revenue line item.

**Specifying Product Unit of Measure**

Typically, you specify the unit of measure (UOM) for a product sold on a revenue line. For example, a product may be charged per minute, per day, or per case.

When you select a product from the product selector or the sales catalog, the application automatically enters the default UOM for the item. You can, however, enter a different UOM. When you do so, the application does not update the quantity or estimated price associated with the product.

The UOM list of values displays only the UOMs applicable for the product.

**Product Eligibility**

The product and product group selectors enforce eligibility rules that help you sell only the products that customers are eligible to purchase. For example, you cannot sell a wireless plan that is not available in the customer’s geographical area. Depending upon setup, you may or may not be able to see ineligible products in the UI.

**Assigning Sales Credits: Explained**

Companies use sales credit assignment to report on salesperson performance and quota attainment, to aid in factoring sales compensation calculation, and to facilitate sales forecasting by territories. Sales credit recipients and revenue amounts roll up the resource hierarchy for pipeline reporting and quota attainment.
Sales credits can be manually entered against a revenue line using the Assign Sales Credits dialog windows, or automatically generated using credit allocation templates. When a revenue line is first created, the application always defaults the revenue line creator as the 100-percent revenue sales credits recipient.

**Revenue Sales Credits**

When assigning revenue sales credits, keep in mind the following:

- Only internal resources are eligible as revenue credit recipients.
- Revenue sales credits must add up to 100 percent.
- The Forecast Territory can be set to any territory assigned to the revenue line with Revenue or Revenue and Nonrevenue Forecast Participation.

**Nonrevenue Sales Credits**

When assigning nonrevenue sales credits, keep in mind the following:

- Both internal and external (for example, partner) resources are eligible as nonrevenue credit recipients.
- Nonrevenue sales credits do not need to add up to 100 percent.
- If the selected Allocation Style is Proportional to Revenue, the sales credit amounts adjust automatically and proportionally when the revenue line amount changes.
- If the selected Allocation Style is Ad Hoc Amounts the sales credit amounts do not change with revenue line amount changes.
- The Forecast Territory can be set to any territory assigned to the revenue line with Nonrevenue or Revenue and Nonrevenue Forecast Participation.

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**Note**

Territories with a Forecast Participation of Nonforecast are not eligible to be set as the forecast territory on either revenue or nonrevenue sales credits.

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**Sales Credit Recipient and Forecast Territory Defaulting Logic: Explained**

Opportunity revenue functionality follows defaulting rules for populating sales credit recipients and forecast territory information. This topic explains these defaulting rules.

When a revenue line is first created, the application sets the revenue line creator as the sales credits recipient at 100 percent. You can edit the default credit allocation, and you can add additional revenue recipients as needed.

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**Note**

Nonrevenue credit recipients are never set by default and must be added manually.
After opportunity assignment is run, the application processes the existing credit allocations for each assigned revenue line to make sure that only an eligible territory is set as the forecast territory, and that the credit recipient is an eligible resource from the forecast territory. This process is important because the revenue or nonrevenue sales credit amounts are automatically rolled into the territory’s forecast when the revenue line is indicated as forecasted.

**Default Forecast Territory Logic**

Generally, in setting default forecast territory, the application uses the following logic:

- Keep the forecast territory the user selected, as long as it is still assigned to the revenue line and its Forecast Participation matches the sales credit type.
- Use the existing credit recipient to derive the forecast territory, whenever possible.
- Territories with a Forecast Participation of Revenue, Nonrevenue, and Revenue and Nonrevenue are treated equally in the defaulting logic.

More specifically, the application uses the following logic when setting default forecast territory:

- If the current forecast territory for the sales credit is one of the assigned territories with a matching Forecast Participation, the application leaves it unchanged.
- If there is only one territory with a matching Forecast Participation Type, the application sets that territory as the forecast territory.
- When there are multiple territories with a matching Forecast Participation, the application chooses the forecast territory using the following precedence:
  - Territory where the existing credit recipient is the owner
  - Territory where the existing credit recipient is a member
  - Territory with a matching Forecast Participation with the latest effective start date
- When there is no matching territory, the application sets the forecast territory to null (this implies that there is a gap in the territory hierarchy). If the forecast territory for a revenue credit allocation has been set to null and opportunity assignment was done from the UI, a warning message appears.

**Default Credit Recipient Logic**

Generally, a credit recipient selected by the user does not get replaced by the application unless he is no longer a qualified credit receiver. The application does not change the recipient if:

- The Lock Owner setting for the revenue line is enabled.
- The current credit recipient is under deal protection.
• The current credit recipient is an owner or member of the forecast territory.

If the above criteria are not met, the application sets the forecast territory owner as the new credit recipient.

Sales Revenue and Territory Forecast Metrics: Explained

Oracle Business Intelligence presents a territory forecast view that displays a list of all forecast items assigned to a given territory. Containing key forecasting related metrics, including Unadjusted Forecast and Adjusted Forecast, the territory forecast view allows territory owners to compare these with the revenue-based metrics, Pipeline and Closed Revenue to Date. Both of these revenue metrics are shown in the context of the territory and forecast period/adjustment period and are sourced from the revenue fact table in the data warehouse.

Closed Revenue

Closed revenue is the total revenue amount of all revenue line items where the status category equals Won, forecast territory is the target territory (which is being forecasted), and close date lies in the target forecast period.

Pipeline

The pipeline represents the total revenue amount of all revenue line items where the status category equals Open, the forecast territory is the target territory (which is being forecasted), and close date lies in the target forecast period.

Forecasting Updates to Metrics

The forecasting application updates Closed Revenue and Pipeline based on real-time information. This behavior is consistent with a real-time forecasting approach, where forecast metrics like Unadjusted Forecast, Best Case, and Worst Case forecast are computed based on real-time data in the online transaction processing (OLTP) system. To achieve this requirement, these metrics are rolled up along the Active Territory hierarchy.

Forecasting stores the revenue amount on forecast items in the transaction currency (or entered currency), as well as in the corporate currency. Salespeople can edit the revenue amount on the forecast items in the transaction currency. Upon saving an opportunity, the application stores the revenue amount in both the entered currency and the corporate currency. Users also have the ability to select the currency in which to view all currency values in the sales forecasting UI, through the use of a page-level currency switcher.

Since revenue amounts in opportunity revenue lines can be in different entered currencies, it is necessary to convert them to corporate currency before aggregating them for Closed Revenue and Pipeline for a territory.

Note that these metrics are visible in the forecasting workbench only.
Revenue Line Syncing with Opportunity Win Probability: Example

When you change win probably percentage at the opportunity level, revenue items that were previously in sync will be resynchronized automatically.

Scenario

For example:

- Opportunity Win Probability: 50%
- Revenue Item 1 Win Probability: 50%
- Revenue Item 2 Win Probability: 50%
- Revenue Item 3 Win Probability: 40%

When the opportunity win probability is changed to 60 percent, the win probability for Revenue Items 1 and 2 also will be changed to 60 percent, because they were previously in sync with the opportunity-level win probability.

The win probability for Revenue Item 3 will remain unchanged, because it was not previously in sync with the opportunity-level win probability.

Also note that an item may be included or discluded in forecasting after the win probability is changed, depending on forecast criteria.

Syncing Behavior of Opportunity and Revenue Line Attributes: Explained

While opportunity statuses and revenue (line) statuses are separate entities, opportunities automatically synchronize the statuses of the two entities based on certain behavior.

Changes to Opportunity Attributes Resulting in Changes to Other Opportunity and Revenue Line Attributes

For the convenience of sales personnel and to improve accuracy of opportunity revenue data, some of the attributes shared by opportunities and revenue lines have specialized interrelated behavior, so that an update to one opportunity or revenue line attribute may result in an update to another opportunity or revenue line attribute. The common attributes that have specialized interrelated behavior include:

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

**Synchronized Opportunity and Revenue Line Attribute Updates**

One type of specialized interrelated behavior of common opportunity and revenue line attributes is the propagation of opportunity attribute updates to in-sync revenue line attributes. A common opportunity and revenue line attribute is said to be in-sync if its opportunity and revenue line values are the same, and if the revenue line is in the same status category as its opportunity. The revenue line is said to be in-sync with its opportunity with respect to the attribute.

An update to an opportunity attribute will result in propagation of the same attribute update to all of the opportunity revenue lines where the revenue line is in-sync with respect to the attribute. For example, if three of four open revenue lines on an open opportunity have the same close date as the opportunity, an update to the opportunity close date will result in the update of the close date of the three in-sync revenue lines.

Propagation of updates from opportunity to in-sync revenue lines applies to the following opportunity attributes:

• Win probability
• Close date
• Include in forecast setting
• Status (not status category)

For example, an update of an opportunity win probability results in propagation of the same update to win probability for all of the opportunity revenue lines that are in-sync with respect to the win probability attribute (in other words, the revenue line has the same original value of win probability that the opportunity did before the update and is in the same status category as the opportunity). In-sync opportunity and revenue line attribute updates apply to:

• Opportunities in all statuses and status categories
• Normal edit opportunity flow actions and close opportunity flow actions
• Mass update opportunities actions

**Opportunity Status Attribute Updates**

Another type of specialized interrelated behavior of common opportunity and revenue line attributes involves updates to opportunity status and the side effects that such updates have on other opportunity and revenue line attributes. Updates to opportunity status have the following side effects:

• Propagation of opportunity status updates to in-sync revenue lines as described later in this help topic
• When opportunity status is updated to a Won status:
  • Update opportunity win probability to 100 percent. Do not propagate the win probability update to in-sync revenue lines.
• Update sales stage to the last stage of the opportunity sales method

• When opportunity status is updated to a Lost or No Sale status:
  • Update opportunity close date to the current date. Do not propagate the close date update to in-sync revenue lines.

• When opportunity status is updated from an open status to a closed status:
  • Enable the opportunity win/loss reason attribute
  • For the close opportunity and mass update opportunities flows only:
    • If the opportunity primary competitor is defined, update the revenue line competitor to the opportunity primary competitor for all opportunity revenue lines where the competitor attribute is undefined
    • The revenue line update behavior related to competitor does not apply to the edit opportunity and mass update revenue lines flows

• When opportunity status is updated from a closed status to an open status:
  • Disable the opportunity win/loss reason attribute
  • Update the opportunity win/loss reason attribute to undefined. Do not propagate the win/loss reason update to in-sync revenue lines.

Revenue Line Status Attribute Updates

Updates to revenue line status have the following side effects on other revenue line attributes:

• When revenue line status is updated to a Won status: Update revenue line win probability to 100 percent
• When revenue line status is updated to a Lost or No Sale status: Update revenue line close date to the current date
• When revenue line status is updated to a closed status: Enable the revenue line win/loss reason attribute
• When revenue line status is updated to an open status:
  • Disable the revenue line win/loss reason attribute
  • Update the revenue line win/loss reason attribute to undefined

Opportunity Win/Loss Reason Attribute Updates

Another type of specialized interrelated behavior of common opportunity and revenue line attributes involves updates to opportunity win/loss reason. The opportunity win/loss reason attribute is disabled when the opportunity is in an open status.
An update to an opportunity win/loss reason will result in propagation of the update to all of the opportunity revenue lines where the win/loss reason attribute is in-sync.

In-sync for the win/loss reason attribute means:

- The revenue line has the same original value of win/loss reason as its opportunity before the update
- If a revenue line and its opportunity both have undefined values, they are considered to have the same value
- The revenue line is in the same status category as its opportunity

The above applies to the close opportunity and mass update opportunities flows only. It does not apply to the edit opportunity and mass update revenue lines flows.

**Revenue Line Win/Loss Reason Attribute Updates**

The revenue line win/loss reason attribute is disabled when the revenue line is in an open status.

**Opportunity and Revenue Line Competitor Attribute Updates**

Another type of specialized interrelated behavior of common opportunity and revenue line attributes involves updates to opportunity competitor.

When opportunity status is updated from an open status to a closed status, if the opportunity primary competitor is defined, update the revenue line competitor attribute to the opportunity primary competitor for all opportunity revenue lines where the competitor attribute is undefined.

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

**FAQs for Manage Sales Revenue**

**How can I lock in a sales credit recipient?**

When assigning sales credits, you can lock the sales credit recipients of a revenue line by setting the corresponding Lock Owner checkbox on the line. This setting
will prevent the recipients from getting replaced automatically by the application when executing default credit recipient logic. Generally, locking is not needed as long as the recipient is an owner or member of one of the eligible forecast territories for the sales credit. However, you should consider locking ad hoc or non-territory-based recipients, such as partner resources, to prevent them from getting removed as credit recipients.
Partners in Opportunities: Explained

Partner-related opportunities allow companies to leverage alliances, potentially achieving growth and expansion strategies faster and maximizing sales through broader territory coverage.

The opportunity-partner relationship includes the following business benefits:

- Direct sales force and partners can work collaboratively and share information effectively as a team.
- The progress of a partner can be measured quantitatively, and thus compensated fairly based on the partner involvement.
- Revenue from partner opportunities can be more accurately forecasted by brand owners.

Salespeople in opportunities can add partners to opportunities (header level) and revenue lines. Partner users can work individually or with internal sales team members to win opportunities.

How Partners Are Added to Opportunities

Partners typically become involved in opportunities in one of the following ways:

- A partner-registered lead is converted to an opportunity: In this case, a partner registers a lead on the brand owner's sales force automation system. An internal resource (usually a channel manager) approves the registered lead, and an opportunity is created based on the registered lead. The partner on the registered lead becomes a part of the opportunity.

- A partner is added to an internal opportunity: In this case, an internal opportunity is created, either by a direct sales team member or through a lead-to-opportunity conversion, or any other method. The partner is manually added to the opportunity as the partner becomes engaged in the selling process.
Supported Partner Functionality

Opportunity functionality distinguishes between these different partner scenarios and takes the appropriate action with regard to team assignment and sales credit allocation. Following is a high-level list of supported functionality:

- Automatic territory assignment of direct salespeople and channel managers to opportunities
- Manual assignment of partners to opportunities in which they collaborate
- Support for a consolidated forecast of expected supplier revenue, for example, partner plus direct sales force
- A territory’s forecast includes all, and only, those revenue items that fall into the territory’s dimensional boundaries
- Channel sales can submit a nonrevenue forecast of partner opportunities, and this can be compared to the quota for channel sales
- Territory management analytics can distinguish between direct and indirect revenue by capturing the sales channel at the revenue line level
- Tracking of partner relationship contributions to sales opportunities that partners generate and help close
- Leads designated as sourced through a partner sales channel are not assigned to direct salespeople

Searching for Duplicate Opportunities: Explained

A partner registers a lead in order to claim exclusive rights to pursue the deal. After the lead has been qualified and registered, the partner user submits it to the channel manager for review. The channel manager then ensures that the lead is not a duplicate in order to minimize channel conflict.

Searching for Duplicate Opportunities

Use the duplicate opportunity search feature in the leads UI to search for potentially matching open opportunities. You can use a combination of search criteria that includes the sales account name, contact name, product group, or product.

Search Behavior

All search fields support wildcards. In addition, if a product group is supplied, the search will also match opportunities that have product group that is either a descendent or an ancestor of the supplied product group in the product hierarchy. Similarly, if a product item is supplied, the search will also match opportunities that have a product group that contains the item. For performance
reasons, either the sales account name or product group or item (or a partial name using wildcard) must be specified prior to executing the search.

Partner Lead Attributes in Opportunities: Explained

After a partner lead registration is approved, it gets converted to an opportunity. During the conversion process, lead attributes, such as sales account, products, revenue amount, primary partner contact, and registration type, are carried over to the newly created opportunity. This topic describes the mapping of these attributes between the lead and opportunity applications. Note that only some of these attributes are specific to partner lead conversions; most of them also apply to standard lead conversion to opportunities.

The following table lists the mapping of general lead attributes carried over into opportunities at the header (opportunity) level.

<table>
<thead>
<tr>
<th>Lead Attribute</th>
<th>Opportunity Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name</td>
</tr>
<tr>
<td>Sales Account</td>
<td>Sales Account</td>
</tr>
<tr>
<td>Estimated Close Date</td>
<td>Estimated Close Date</td>
</tr>
<tr>
<td>Date Approved</td>
<td>Creation Date</td>
</tr>
<tr>
<td>Registration Type</td>
<td>Registration Type</td>
</tr>
<tr>
<td>Registration Number</td>
<td>Registration Number</td>
</tr>
<tr>
<td>Expiration Date</td>
<td>Expiration Date</td>
</tr>
<tr>
<td>Deal Approved By</td>
<td>Owner</td>
</tr>
<tr>
<td>Deal Approved By Resource Org</td>
<td>Resource Org</td>
</tr>
<tr>
<td>Budget Status</td>
<td>Budget</td>
</tr>
<tr>
<td>Budget Amount</td>
<td>Budget Amount</td>
</tr>
<tr>
<td>Currency Code</td>
<td>Currency Code</td>
</tr>
<tr>
<td>Partner</td>
<td>Partner</td>
</tr>
<tr>
<td>Partner Type</td>
<td>Partner Type</td>
</tr>
<tr>
<td>Partner Program</td>
<td>Partner Program</td>
</tr>
<tr>
<td>Owner</td>
<td>Primary Partner Resource</td>
</tr>
</tbody>
</table>

The following table lists the mapping of lead contacts attributes to opportunity contacts attributes.

<table>
<thead>
<tr>
<th>Lead Attribute</th>
<th>Opportunity Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contact Attributes</td>
<td>Contact Attributes</td>
</tr>
<tr>
<td>Contact Role</td>
<td>Contact Role</td>
</tr>
<tr>
<td>Primary</td>
<td>Primary</td>
</tr>
</tbody>
</table>

The following table lists the mapping of lead products attributes to opportunity revenue line attributes.
<table>
<thead>
<tr>
<th>Lead Attribute</th>
<th>Opportunity Attribute</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product</td>
<td>Product</td>
</tr>
<tr>
<td>Product Group</td>
<td>Product Group</td>
</tr>
<tr>
<td>Currency Code</td>
<td>Currency Code</td>
</tr>
<tr>
<td>Quantity</td>
<td>Quantity</td>
</tr>
<tr>
<td>Unit Price</td>
<td>Unit Price</td>
</tr>
<tr>
<td>Amount</td>
<td>Revenue Amount</td>
</tr>
<tr>
<td>Unit of Measure</td>
<td>Unit of Measure</td>
</tr>
<tr>
<td>Estimated Close Date (header)</td>
<td>Close Date</td>
</tr>
</tbody>
</table>

**FAQs for Manage Opportunity Partners**

**Why can't I add a partner to a revenue line?**

A partner must first be associated at the opportunity header level to be able to be selectable in the Revenue Items region. The list of partners available for selection in the revenue table is restricted to those already added at the opportunity level.

**Why can't I add a partner resource to the opportunity team?**

A partner must first be associated to the opportunity header level prior to adding the partner resource to the team. The list of resources available for selection to the opportunity team is all internal resources and partner resources whose organizations are associated to the opportunity.
Sales Dashboard: Overview

The Sales Dashboard lets sales teams perform sales activities and track progress against day-to-day sales activities. In addition, with embedded analytics, sales managers view the effectiveness of individual and team sales execution.

Summary of Features

The dashboard is configurable. The key features of the Sales Dashboard include the following:

- One-Stop Landing Page: Sales staff have access to all of their daily activities in one spot. They can view reports about a variety of sales metrics, drill down to transactional data, and access productivity tools.

- Business Intelligence Reports: Several sales business intelligence reports are available for sales staff to add to the dashboard. See the topic, Sales Business Intelligence Reports: Explained for more information.

- Productivity Tools: Several sales-integrated productivity tools are supplied, including the Calendar, Key Contacts, My Tasks portlets, and Activity Streams.

- Drill Down into Transactional Data: Sales personnel can navigate to business objects, such as opportunities and sales accounts, and see the underlying transactional data.

Generate Sales Intelligence

Sales Business Intelligence Reports: Explained

Several sales business intelligence reports are available to help you view and analyze data. Many of these reports are available for you to add to your view of the Sales Dashboard.
Sales Business Intelligence Reports

The following table lists the Sales business intelligence reports, their descriptions, and where they appear in the UI.

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
<th>Where It Appears</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Period Performance</td>
<td>Displays quota attained by the user in the current quarter.</td>
<td>Available to be added to the opportunity work area</td>
</tr>
<tr>
<td>Past Period Performance</td>
<td>Displays quota attained by the user in the previous quarter.</td>
<td>Available to be added to the opportunity overview page using Page Composer</td>
</tr>
<tr>
<td>Pipeline Report</td>
<td>Displays opportunity sales credit amounts in relationship to the revenue target for each sales stage.</td>
<td>Opportunity work area, Sales Dashboard</td>
</tr>
<tr>
<td>Opportunities at a Glance</td>
<td>Highlights open opportunities in the current quarter with the highest value, as well as their Win Probability, Coverage and Days Stalled. Shows all the open opportunities in the current quarter (that user has access to) along with selected attributes. Sorted descending by opportunity value.</td>
<td>Sales Dashboard</td>
</tr>
<tr>
<td>Stalled Opportunities</td>
<td>Displays open opportunities that are stalled (open for a time period longer than the average duration of the sales stage).</td>
<td>Sales Dashboard</td>
</tr>
<tr>
<td>Opportunity Watch</td>
<td>Displays all open opportunities in the current quarter, along with sales account and days to close.</td>
<td>Sales Dashboard</td>
</tr>
<tr>
<td>Current Revenue at Stake</td>
<td>Displays an overall picture of the progress and size of currently open competitive opportunities where the competitor is present.</td>
<td>Competitors pages</td>
</tr>
<tr>
<td>Win Loss Trends</td>
<td>Displays won and lost revenue by quarter for current or past year.</td>
<td>Competitors pages</td>
</tr>
<tr>
<td>Win Loss Reasons</td>
<td>Displays the sum of lost or won revenue by reason for a particular quarter in past or current year.</td>
<td>Competitors pages</td>
</tr>
<tr>
<td>Customer Revenue Trends</td>
<td>Displays closed revenue by product group. Shows the purchasing trend of a particular customer. Allows successive drill down to the product hierarchy.</td>
<td>Customer Center</td>
</tr>
<tr>
<td>Customers at a Glance</td>
<td>Displays customers on the sales account team (of the user and his directs), along with key performance indicators relating to the customer interaction.</td>
<td>Sales Dashboard</td>
</tr>
<tr>
<td>Customer Watch</td>
<td>Displays, by customer, current-quarter opportunities the user has access to.</td>
<td>Sales Dashboard</td>
</tr>
</tbody>
</table>
Sales Reports Available by Drilling Down

The following reports are available by drilling down from other reports:

- **Opportunity List**: Provides opportunity details from the context of the parent report. It is available by drilling down from the Pipeline, Customer Watch, and Current Revenue at Stake reports.
- **Sales Representative Account Activity Chart**: Displays the number of sales activities for the current period for the top-seven accounts owned by a salesperson. It is available by drilling down from the Team at a Glance report.

Analyze Sales Performance

Sales Prediction: Overview

Sales prediction features enable organizations to capture and leverage predictive sales intelligence. Predictive models analyze sales data to evaluate buying patterns. After the evaluation of model results, lead generation can be scheduled to disseminate lead recommendations to users. Each lead recommendation includes win likelihood, average expected revenue, and sales cycle duration.

Summary of Features

Sales prediction features include:

- **Application Home Page**: The application home page provides sales analysts with a summary of the prediction model results. Additionally, reports on the dashboard provide overviews of model performance and leads adoption.
- **Predictive Model Learning**: Model learning uncovers hidden selling patterns in complex business environments. Salespeople can replicate sales success using historical insight generated through model training.
- **Rule-based Recommendations**: When new products are launched or during initial deployment, historical data is sparse. In such cases, the sales analyst can create customer-, industry-, or product-specific rules to drive the recommendation of new products.
- **Higher Lead Adoption Rate**: By utilizing a combination of data mining, segmentation, prediction and business rules, sales prediction functionality ensures that the recommendations have a higher likelihood of being converted to a win.
- **Analyze Recommendation Performance**: Built-in analytical reports verify whether the recommendations are being accepted by the sales organization. If adoption is low, then the predictive models can be fine-tuned by selecting different attributes for model learning or editing the rules. Simulation can then be performed to assess the impact of these new changes before publishing new recommendations.
- **Usage across Oracle Sales Cloud Service**: The recommendations generated can be viewed when using other Sales Cloud capabilities.
such as opportunity landscape, managing customers and territories, and qualifying leads. For example, recommendations can be ranked and qualified as leads after being reviewed in the opportunity landscape. When reviewing customer details, recommended products display next to the customer with the rationale for the recommendation. Territory managers can use sales prediction metrics to set sales targets by territory and assign them to sales people. Metrics ranking also determines whether leads can be qualified during the lead qualification process.

Getting Started with Sales Prediction: Prerequisites

This topic helps you get started with sales prediction capabilities. It details the prerequisite tasks and takes you through steps to analyze attributes, run model training, and generate leads.

User Roles

- **Sales Analyst**: Identifies interesting sales trends and customer behavior insights useful to help the overall sales organization to target customers more effectively.
- **Sales Administrator**: Performs ongoing administrative tasks, corrects erroneous or incomplete data, and customizes the application according to business needs. The Sales Administrator is the Oracle Sales Cloud ‘super user’.

Process Flow

Prerequisites

There are important prerequisite tasks that you need to complete. You must check if your data to run model learning is accurate. Running attribute analysis report allows you to view the quality of data and impacts the quality of recommendations generated. Once you have results from the attribute analysis report, you can use your judgment to select entities and attributes that are useful for prediction.

You also need to select the products that are recommendable. A company usually has a large portfolio of products but they have the option to make only a subset of them available for model learning, rule creation, and recommendations.
### Running Attribute Analysis Report

You must understand the relative quality of your data to optimize results. Quality data that is well-populated and has good distribution of values ensures best results. If data quality is poor, you can still use it but you must take steps to improve data to maximize results. Use the Attribute Analysis Report to obtain detailed data distribution and importance metrics for each attribute across entities. Based on the analysis report, select the most appropriate attributes for model training. Attributes that have fewer null values and higher importance are good candidates for predictions.

To run attribute analysis report:

1. Log in as a sales analyst.
2. In the Navigator menu, select the Recommendations link under the Sales heading.
   
   The Recommendations page appears.
3. Click the Schedule Attribute Analysis task under the Scheduling heading.
   
   The Schedule Attribute Analysis page appears.
4. Click the Create icon in the Scheduled and Completed region.
   
   The Create Attribute Analysis Report page appears.
5. Enter details as required and click the Continue button.

The Attribute Analysis Report appears with detailed analysis and the importance of each attribute in the selected entities.

### Selecting Entities and Attributes

Sales prediction functionality generates model training results from historical sales data based on selected model entities and attributes. Based on the findings in the attribute analysis report and your expertise, you can select attributes from each entity that are important predictors for recommendations. You can add or remove attributes easily if the report determines that they add to the predictability of the recommendations. For example, an entity like Customer may have two attributes of high data quality, residential address and annual income. Only if you have a high annual income, you can live in Palo Alto,CA. The analyst may choose to select one of many attributes that have the same impact on prediction to avoid redundancy.
To select entities and attributes:

1. Log in as an Administrator.

2. Navigate to the Setup and Maintenance work area by selecting the link in the Navigator menu.

3. On the All Tasks tab, search for the Select Model Entities and Attributes task.

4. Click the Go to Task button for the Select Model Entities and Attributes task.
   The Select Model Entities and Attributes page appears.

5. Select the entities and attributes that you want to include for model training.
   To select attributes, click the respective entity and select attributes from the list of available attributes.

6. Click the Save and Close button.

Selecting Products for Recommendation

In this step, you select the set of products that will be recommended to customers. Select products based on your organization’s business needs. For example, you may select products based on the sales performance of the past products or expected sales of new products according to the ones you want to promote at a given point. However, after you run model learning and apply rules, from the set of recommendable products, only products that are relevant to a specific customer are recommended.

To select products:

1. In the Navigator menu, select the Recommendations link under the Sales heading.
   The Recommendations page appears.

2. Click the Manage Products for Recommendation task under the Rules and Products heading.
   The Manage Products for Recommendation page appears.

3. Click the Add menu under the Search Results.
   The Browse Catalog page appears.

4. Search for and select the product groups or products for recommendation.

5. Click the Submit button under the Products for Recommendation heading.
   The Manage Products for Recommendation page appears.

6. Click the Done button.

Setting Configuration Parameters

Sales prediction functionality contains a set of configuration parameters already preset with default values. You can edit these parameters to define how you want the application to function. See the Oracle Sales Cloud: Implementing Sales for a list of existing configuration parameters and their function.
The following table lists the important configuration parameters and their function:

<table>
<thead>
<tr>
<th>Configuration Parameter</th>
<th>Default Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>displayModelBasedRecommendations</td>
<td>True</td>
<td>When this is set to True, model-based recommendations are displayed in consuming applications.</td>
</tr>
<tr>
<td>enableAvgWinRateRecommendations</td>
<td>True</td>
<td>When set to True, recommendations based on average win rates are displayed in consuming applications. This parameter applies only to the Order Capture eligibility rules.</td>
</tr>
<tr>
<td>leadSourceCode</td>
<td>Null</td>
<td>The selected value is updated in the SOURCE_CODE in the lead staging table for leads customization. During implementation, you can customize the ILS with new values.</td>
</tr>
<tr>
<td>numberOfTopDrivers</td>
<td>3</td>
<td>Defines the number of top drivers to return for each recommended product. The values can range from 0-5.</td>
</tr>
</tbody>
</table>

To set configuration parameters:
1. Log in as an Administrator.
2. Navigate to the Setup and Maintenance work area by selecting the link in the Navigator menu.
3. On the All Tasks tab, search for the Manage Recommendations Configuration Parameters task.
4. Click the Go to Task button for the Manage Recommendations Configuration Parameters task.
   The Manage Recommendations Configuration Parameters page appears.
5. Select the configuration parameter that you want to set, and click the Edit icon.
6. Set the desired value and click the Save button.
7. Click the Done button.

**Working with Sales Prediction Features**

This topic helps you start working with sales prediction capabilities. It takes you through steps to analyze attributes, run model training, and generate leads.

**User Roles**
- **Sales Analyst**: Identifies interesting sales trends and customer behavior insights useful to help the overall sales organization to target customers more effectively.
Using Sales Prediction Features
Once the prerequisite tasks are complete, the sales analyst can run model training, write rules, and generate leads.

Summary of Tasks

<table>
<thead>
<tr>
<th>Note</th>
<th>All tasks are performed by the sales analyst.</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Schedule model training.</td>
</tr>
<tr>
<td></td>
<td>2. Analyze model training results.</td>
</tr>
<tr>
<td></td>
<td>3. Write prediction and eligibility rules.</td>
</tr>
<tr>
<td></td>
<td>4. Simulate product recommendation.</td>
</tr>
<tr>
<td></td>
<td>5. Generate leads.</td>
</tr>
</tbody>
</table>

Scheduling Model Training
After selecting products, you must schedule model training and check how the model training results look.

1. Click the **Schedule Predictive Model Learning** task under the **Scheduling** heading.
   The **Schedule Predictive Model Learning** page appears.

2. Click the **Create** icon in the **Scheduled and Completed** region.
   The **Create Predictive Model Training Process** page appears.

3. Enter details as required and click the **Continue** button.
   The model training process is scheduled. View the summary table for the status of the process. Once the process is completed, model training results will be available for review.
   You can now analyze the predictive model to identify products that customers are most likely to buy.
Analyzing Predictive Models

1. Review the Model Insight on the Overview page and details of model results in the Analyze Predictive Models task.

2. You can identify the products with low confidence, likelihood to buy, expected revenue, or high time to close and decide whether you need to eliminate these products from the set of recommendable products or write rules to support them. These occurrences may be due to inaccurate or incomplete data and can be reviewed periodically.

Writing Rules

1. Click the Manage Sales Predictor Rules task under the Rules and Products heading.

2. Create prediction or eligibility rules to improve the quality of your recommendations. If you want to create a restriction on the products selected using the Manage Products for Recommendation task, you can create a prediction rule for that product. You can create eligibility rules to further restrict the recommendation of products. If a product is not eligible for purchase by certain customers, you can exclude that product from the recommendations for those customers.

   **Note**
   Eligibility rules always override model results and prediction rules.

Simulating Product Recommendation

After you run model training and define rules, you can select a sub-set of customers and conduct a simulation.

1. Click the Simulate Product Recommendation task under the Analysis heading to simulate recommendations.

2. Review the product recommendations for the selected customers and generate leads if the recommendations look accurate.

Generating Leads

1. When you are satisfied with the simulation results, click the Schedule Sales Leads Generation task under the Scheduling heading to generate leads.

   Your leads are generated.
   Once you schedule leads, they will be available for other Sales Cloud capabilities such as managing opportunities and customers.

Selecting Products for Recommendations: Points to Consider

You may have numerous products in your sales catalog, but 20% of the products usually generate 80% of the revenue.
You can run model trainings or write prediction rules or eligibility rules only for those products that are selected for recommendations. Also, you can only generate leads for products selected for recommendation.

**Sales Focus**

Product selections should be based on your business objectives. For example, if you want to increase sales for poorly performing products or to achieve inventory reduction goals, your product selections can be used to generate leads to achieve those objectives. Once you select a set of products for recommendation, you can create prediction rules to meet sales objectives, particularly for new products or in cases where historical sales data is insufficient to generate useful correlation statistics.

You can change the products or product groups selected as the business needs and market conditions change. A product that is currently in high demand may have no buyers within 12 months and so you have the flexibility to update the products in the set of recommendable products.

**Product Hierarchy Level**

Sales prediction capabilities allow you to manage the set of products available for recommendation at any level in the product hierarchy and predict recommendations at that level.

For example, in the hierarchy above, if you want to select a product called Zylo HDTV LED television, you can either select the specific product, or select product groups higher in the product hierarchy, such as Television or Home Audio/Video. You can decide the level at which you want to generate recommendations and enforce that decision for sales prediction.

**Eligibility**

Additionally, you can create eligibility rules which prevent the sale of certain products within customer segments.

**Prediction Models or Prediction Rules: Critical Choices**

You can leverage predictions based on either the predictive models or business prediction rules, or both, to generate sales leads for your company’s marketing
functions. Simulating product recommendations also uses the model or prediction rules.

**Predictive Models**
Use the predictive models if you have existing product lines with enough historical opportunity revenue data that provide strong statistical correlations between customers and buying patterns for meaningful results. The predictive models find target customers for products and predict the estimated revenue and sales cycle by customer.

**Prediction Rules**
Set manual prediction rules if you have:
- New product offerings
- Little to no historical data
- Historical data available, but not prescriptive of future trends, based on sales and marketing insight
- Discontinuity in market trends so that the past is no longer an indication of the future (for example, economic, social, or political changes)

Analysts create prediction rules to support sales objectives. Oracle Business Intelligence analyzes the available historical data and provides metrics for a target product or product group.

Prediction rules can be formulated leveraging the analysis of the predictive models. For a given product with insufficient data, analysts can identify customers to target for similar products based on the analysis conducted for a corresponding, similar product. The insight gained from this analysis can augment the analysts’ and product experts’ knowledge of the sales environment. Effectively, the evaluation of the predictive model can serve as a basis for prediction rule formulation and for the sales prediction metrics values made available to sales users.

**Model Training: Example**

Model training discovers intrinsic structures in historical data and makes predictions for future leads and recommendations.

**Scheduling Model Training**
You are a sales analyst responsible for North America Sales in a server manufacturing company. You want to use the predictive model to mine historical data and use them to generate quality leads. You are working towards promoting 20 server products. You want to select these 20 products and run model training.

To schedule model training:
1. Click the Schedule Predictive Model Learning task to run model training.
2. Click **Actions** and then **Create**.
3. In the Create Predictive Model Training Process page, select the sales period that you want the model training to use for the prediction.
4. Select hierarchy level and specific products for model learning.
5. Select regions for which model-based recommendations will be generated.
6. Click the **Continue** button.

You scheduled model training. You can see the status of your model training process on the Schedule Predictive Model Learning page. You analyze the predictive model to check if the model findings are accurate and can be used to generate leads. When you analyze the reports, you realize that few old server products can only be recommended to customers who are already using a related product. You want to ensure that the prediction model does not recommend these servers to customers who do not own the related product. To ensure this, you define an eligibility rule so that the older servers are not recommended to customers who do not already own the related product. To create the eligibility rule, select the product in the Manage Product Recommendations task, and then access the Manage Prediction Rules task to create an eligibility rule for the same product.

After writing the eligibility rule, you run model training again.

---

**Note**

You can simulate product recommendations before generating leads.

You are now satisfied with the model predictions and you are ready to generate leads. After the initial model training, you can run model training incrementally.

### Recommendation Metrics: Explained

Sales prediction features provide recommendation metrics on top products that customers are likely to buy, along with sales cycle and revenue estimates. Predictive models and prediction and eligibility rules generate recommendations based on these metrics. Sales prediction functionality provides the following recommendation metrics: likelihood to buy, recommendation rating, estimated revenue, and estimated sales cycle.

#### Likelihood to Buy

Sales prediction functionality uses Oracle technology to generate metrics on the likelihood that a customer would buy a product. Data mining on historical sales records is used to predict the likelihood. The likelihood to buy metric connects learning on opportunities won or lost in the past to generate probability of win in the future. The metrics value is supported by details such as customer profile attributes, sales order or service request patterns, past purchased products or services, and so on.

#### Recommendation Rating

Sales prediction functionality provides a star-rating system to help you analyze recommendations. The star-rating system uses a scale of 1 to 5 stars to indicate the strength of the recommendation. The recommendation rating is calculated using the likelihood to buy and average win rate metrics.

#### Estimated Revenue and Sales Cycle

Sales prediction features use native Oracle data mining capabilities to estimate revenue and sales cycle. Sales cycle is the interval between the time when the revenue line is created and the time when it's closed. After a lead is generated, sales predictor estimates the revenue for the potential sale of a product to a customer.
Confidence, Rule Support, and Lift
Sales prediction functionality uses the ODM association model to generate reports that show the association model metrics. The reports show the following metrics:

- **Rule support**: Indicates the ratio of occurrence of the influencer and recommended product together over the total number of records. Support value ranges between 0 and 1.
- **Confidence**: Indicates the ratio that shows the occurrences of the influencer over records containing the recommended product. Confidence value ranges between 0 and 1.
- **Lift**: Indicates the improvement in predictive ability when using association model prediction over randomness. The baseline for lift is 1. If the lift is greater than 1, it indicates that the predictive ability while using prediction is better than randomness.

Metrics - Model and Rules
When you run model training and analyze predictions, you will first see the metrics for likelihood to buy. You can select the estimated revenue, sales cycle, or the association model to view these metrics. When creating a prediction rule, a set of business-intelligence-generated metrics are populated automatically for each target product selected (if past sales data exist for the product). The Business Intelligence metrics are calculated based on predefined formulas which are different from the model predictions. Product experts can use the pre-populated metric values or override the values based on their expertise.

Metrics Usage within Oracle Sales Cloud
The recommendation metrics generate leads that are assigned to salespersons within opportunities. Sales prediction features also feed recommendations to manage customers, where salespersons can view product recommendations for specific customers and pursue these leads.

Attribute Analysis Report: Explained
Sales Prediction enables you to schedule attribute analysis and generate reports that display the data distribution of attributes and their importance. The report highlights the importance of selected attributes across entities such as Customers and Assets.

To schedule attribute analysis, access the Schedule Attribute Analysis task under Scheduling on the Recommendations page. Once the status of the attribute analysis report shows Succeeded, click the Job ID to view the report. The attribute analysis report contains several values to help you analyze the importance of attributes. Attributes can be categorical or numerical. For example, country is a categorical attribute and Revenue a numerical attribute. The table below provides an example of a numerical attribute with sample values and description of each column in the report.

<table>
<thead>
<tr>
<th>Column Header</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entity</td>
<td>Customer</td>
<td>The entity that holds various attributes within.</td>
</tr>
<tr>
<td>Attribute</td>
<td>Annual Revenue</td>
<td>Attributes within an entity that contribute to prediction.</td>
</tr>
<tr>
<td>Null percentage</td>
<td>10%</td>
<td>Percentage of attribute values that is null.</td>
</tr>
<tr>
<td>----------------</td>
<td>-----</td>
<td>---------------------------------------------</td>
</tr>
<tr>
<td>Distinct Values</td>
<td>N/A</td>
<td>Count of distinct attribute values (applicable to categorical attributes only).</td>
</tr>
<tr>
<td>Distinct Value Percentage</td>
<td>N/A</td>
<td>Percentage of distinct attribute values (applicable to categorical attributes only).</td>
</tr>
<tr>
<td>Median</td>
<td>45,000</td>
<td>Applicable to numerical attributes only.</td>
</tr>
<tr>
<td>Average</td>
<td>56,000</td>
<td>Applicable to numerical attributes only.</td>
</tr>
<tr>
<td>Minimum</td>
<td>23,000</td>
<td>Applicable to numerical attributes only.</td>
</tr>
<tr>
<td>Maximum</td>
<td>1,12,000</td>
<td>Applicable to numerical attributes only.</td>
</tr>
<tr>
<td>Standard Deviation</td>
<td>5200</td>
<td>Measure of variance of the data.</td>
</tr>
<tr>
<td>IQR</td>
<td>23,000</td>
<td>Inter-quartile range indicates the difference between upper and lower quartiles.</td>
</tr>
<tr>
<td>Importance</td>
<td>0.89</td>
<td>Importance of the attribute.</td>
</tr>
<tr>
<td>Rank</td>
<td>1</td>
<td>Rank of the attribute based on its importance.</td>
</tr>
</tbody>
</table>

### Analyzing the Report

Two columns are significant in identifying the best attributes, and have to be interpreted in conjunction with one another: Null Percentage and Rank.

The table below provides an example.

<table>
<thead>
<tr>
<th>Entity</th>
<th>Attribute</th>
<th>Null Percentage</th>
<th>Importance</th>
<th>Rank</th>
</tr>
</thead>
<tbody>
<tr>
<td>Customer</td>
<td>Annual Revenue</td>
<td>10%</td>
<td>0.89</td>
<td>1</td>
</tr>
<tr>
<td>Customer</td>
<td>Industry</td>
<td>30%</td>
<td>0.47</td>
<td>3</td>
</tr>
<tr>
<td>Asset</td>
<td>Asset Name</td>
<td>70%</td>
<td>0.59</td>
<td>2</td>
</tr>
</tbody>
</table>

In the example above, the null percentage of **Asset** is 70%, which means that 70% of data for this attribute is missing. Therefore, you may conclude that the data is insufficiently populated and may not be suitable for prediction. Although **Asset** is ranked 2, **Customer** has fared better with lower null percentage. Therefore, you conclude that **Asset** is not contributing much to prediction and you can choose to remove this attribute.

You must access the Select Rules and Model Entities and Attributes page from Functional Setup Manager to add or delete attributes.

### Selecting Best Attributes for Models and Rules: Worked Example

You can use two methods to identify and select the most predictive attributes for model training:
• Train, Analyze, Retrain: This method involves training the model on a set of attributes, reviewing the results to assess their prediction accuracy, and retraining the model with an updated attribute set.
• Run Attribute Analysis Report: This method uses the model to identify attributes that are well-populated and compares the importance of an attribute to its peers.

This example shows how to select the best attributes to derive quality model-based predictions. In this scenario, you are a sales analyst responsible for North America sales performance. You want to analyze your model prediction and choose the best attributes for further model training. You want to focus on the product 8000RT Server.

Task Summary
1. Analyze attributes of most recent model training results, or run Attribute Analysis Report, or both.
2. Change attributes selection in the Sales Administrator UI for Select Model and Rule Entities and Attributes task.
3. Retrain the model based on different attributes or date range selection.

Analyzing Prediction Model
1. In the Tasks region, click Analyze Prediction Models.
2. In the Analyze Prediction Models page, find the 8000RT Server product.
3. Note the Revenue Items Learned and Model Quality for the product.

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revenue Items Learned</td>
<td>167</td>
</tr>
<tr>
<td>Model Quality</td>
<td>51</td>
</tr>
</tbody>
</table>

You notice that although there is sufficient data on which the model has learnt, the model quality is not very good.

4. Click the product to view the model reports.
5. Analyze the attributes for likelihood to buy, as shown in this table.

<table>
<thead>
<tr>
<th>Report Region</th>
<th>Description</th>
<th>Analysis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lift Curve</td>
<td>The further away the lift curve is from the base line, the better the model quality. Lift curve shows if the selected attributes are good predictors of model learning.</td>
<td>The lift curve for this product shows that the model is not performing well.</td>
</tr>
<tr>
<td>Top Predictors</td>
<td>Indicates top predictors under different attribute values such as Customer Profile, Past Purchased Products or Services and so on.</td>
<td>The top predictors for Customer Profile are Number of Employees and Number of Installed Base Assets.</td>
</tr>
</tbody>
</table>
Based on your analysis, you identify that the following changes are required in attribute selection for Models to improve model quality:

- Select only one of the following attributes: Number of Employees, Employee Size Category, or Customer Size Code.
- Select either Country or State. Since you want a global model for your products, you would remove the State attribute.

You can also use the Association model to determine which attributes are significant drivers of a product sale. You find that there is a strong association between customers in high technology industry and the sale of 8000RT Server. Additionally, customers who own the 6000RT server tend to buy the 8000RT server as its replacement. This is determined based on the confidence and rule support values of 8000RT server. You can use this association to create rules to target future sale of 8000RT server to customers in the high technology industry who already own 6000RT servers.

- Select the Industry attribute under the Rule region on the Select Model and Rule Entities and Attributes page.

**Scheduling Attribute Analysis Report**

Attribute Analysis Report helps you identify the best attributes for predicting win rates for an opportunity and a customer’s likelihood to buy a product, relative to those attributes that do not meaningfully contribute to model quality.

1. In the Tasks region, click **Schedule Attribute Analysis Report**.
2. Click **Actions** and **Create**.

3. Complete the fields as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attribute Analysis Report Name</td>
<td>8000RT Servers 2011</td>
</tr>
<tr>
<td>Start Date</td>
<td>1/1/2011</td>
</tr>
<tr>
<td>End Date</td>
<td>12/31/2011</td>
</tr>
</tbody>
</table>

4. Click **Continue**.

5. In the Attribute Analysis Report Process page, click **Submit**.

6. In the confirmation dialog box, click **OK**.

7. Once the report is generated, click the **8000RT Servers 2011** report.

8. Review the report:

   Review the attribute rank and null percentage.

   - **Attribute rank**: The report ranks attributes based on their importance. Review the rank of each attribute.

   - **Null percentage**: Higher null percentage indicates poorly populated data. For example, if an attribute is ranked 1 but the null percentage is 90%, you would not select this attribute for model training as the ranking is only based on poorly populated data.

   - **Median and Average**: Review the median and average to further analyze the distribution of data.

You will notice the following:

- **Small Business Indicator** is one attribute that is ranked high in the report and the null percentage is very low.

- **Annual Revenue** is also ranked high, but the null percentage is also very high.

- You decide to select Small Business Indicator and remove Annual Revenue before running model training again.

### Selecting Attributes

You must contact your administrator to select or deselect attributes from the Select Model Entities and Attributes task.

1. Search for and click **Select Model and Rule Entities and Attributes** from the Setup and Maintenance page.

2. In the Select Model and Rule Entities and Attributes page, click **Account** under the **Model** region.

3. In the Select Attributes page, search for **Customer Size Code**, **Employee Size Category**, and **State** from **Selected Attributes** and move them to **Available Attributes**.
4. In the Available Attributes region, search for Small Business Indicators and move it to Selected Attributes.

5. Click OK.

   **Note**
   For each Entity, add attributes that attribute analysis report recommends to be most important for predicting win rates.

6. Click Save and Close.

   Now that Customer Size Code, Employee Size Category, and State are deselected and Small Business Indicators is selected, model training should show better model quality.
   Similarly, select the Industry attribute under the Rules region.

**Retraining the Model**
You must run model training again and check if predictions are as expected.
1. Run model training and check predictions.
   You will notice that model quality has increased to 80%

2. Click Analyze Prediction Model to check if the model is predicting as you expected.
   You are satisfied with the results and you are ready to generate leads and recommendations.

**Rules Management: Explained**

Sales prediction features enable you to create and manage prediction and eligibility rules efficiently.

**Rule Types**

Rules are of two types:
- Prediction rules
- Eligibility rules

**Rule Folders**

Rule folders enable you to logically group and manage multiple rules and rules sets. Rule folders allow you to manage your rules by campaigns, seasonal events, sales regions or any such logical grouping that relates to the context in which you are creating the rule. For example, you can create a folder for North American sales campaigns in which you can logically group any type of rule pertaining to campaigns for this region. You can group both prediction and eligibility rules within a rule folder. You can set a rule folder to test or production. A test folder allows you to create rules and view the impact in a test environment without impacting recommendations in consuming applications. When you are satisfied with the simulation results, you can change the status of the folder to Production and the prediction rules will immediately appear as...
recommendations in other applications. Only recommendations based on active rules within production folders are visible in other applications. Additionally, rule-based leads are generated using active rules within Production folders.

Views: Rule Folders and Rules

You can choose what the search results must display by selecting either Rule Folders or Rules view. Rule folders view is the default view where the search results display all the rule folders that exist. You can view all rules or rule folders that impact a product across prediction and eligibility rules. You can search by the folder name in the Rules view to view all the rules that a folder contains. In the Rules view, you can also view and compare across both prediction and eligibility rule types satisfying a search criteria. For instance, you can view all rules that specify conditions for a specific product. You can view the rule conditions in the Rules view and these conditions are also displayed in the Recommendations Rationale for the recommendation.

Sales Prediction Rules: Explained

One method for providing salespeople with quality leads with the best products to sell to specific accounts is to use rules that identify target customer segments for target products. Sales prediction features enable you to create two types of rules:

- Prediction rules
- Eligibility rules

Prediction Rules

New products with little or no past sales history, products that need to be promoted due lack of demand, and products that need to be pushed to align with marketing initiatives are some of the situations where a company needs to write prediction rules. Many companies have product experts who have deep market and industry insight about the best customers they should target for their products. They use the information provided by the data mining model to validate their knowledge and to extract correlation patterns. Then they write their own prediction rules to control product recommendations and predictions. For example, you can create a prediction rule to recommend a new mobile product called MNet ST6 that has no historical data, to customers of a specific age group.

Eligibility Rules

You can create an eligibility rule to define conditions that a customer must meet to be eligible for a product recommendation. Eligibility rules apply to both prediction rules and models. You can have rules which prevent the sale of certain products to certain customers. Management of eligibility rules can ensure the model derived recommendations don’t inadvertently violate these rules. For example, you can have an eligibility rule that ensures that you do not recommend the MNet ST6 mobile to customers in Asia because it will not work there. Achieving sales objectives via prediction rules and compliance with sales policies via eligibility rules will help determine which products to select for recommendations. Eligibility rules always win over prediction models and rules.
Managing Prediction Rules: Examples

Prediction rules identify target customers for target products to provide quality leads for sales. The following scenarios illustrate when you might want to use prediction rules.

Using Prediction Rules to Introduce a New Product
Sales executives determine that a new product will sell well to large manufacturing customers in North America who have previously bought an earlier model. The sales administrator creates a new prediction rule for the new products with the following conditions:
- Employee size > 10,000
- Industry = Manufacturing
- Region = North American
- Asset = the name of the prior model
The product expert predicts the expected revenue of 500,000 dollars if the targeted product is sold to customers who meet the rule criteria and predicts that the sales cycle should take 30 days. He sets the likelihood to buy at 95 percent.

Using Prediction Rules to Improve Product Sales
A product specialist researches why a product is not selling as well as expected. He checks the model quality reports for the product and discovers that the model is of low quality. Sales executives are sure that the product will sell well to pharmaceutical companies in the eastern United States, so the sales administrator creates a new prediction rule for the product that includes these customer conditions.

Using Prediction Rules to Overcome Incorrect Data
The company hired several new salespeople six months ago. Since then, the company has discovered that these new salespeople used old product codes when selling several products. The model is missing accurate historical data for these products. Therefore, the company uses prediction rules based on expert knowledge to generate leads missed by the model.

Eligibility Rules: Examples

Following are examples of when you can use eligibility rules to eliminate ineligible customers from product recommendation simulations and sales leads generation, providing the simulation and lead generation use prediction rules.

Government Regulations
You sell software and government regulations prevent you from selling certain types of software to certain countries. You write rules to prevent recommendations of these products to any customers with locations in these countries.

Customer Criteria
You sell two similar chemicals, both used in manufacturing, but only one meets the criteria for use in the health care industry. You write a rule to designate customers in the health care industry ineligible for one of the chemicals.
Cross Selling
One of your product lines is only sold to new customers because of its low profit margin. You write a rule to prevent the line from being offered to anyone as a cross sell.

Assets
You are starting a sales campaign that features your latest model microscope. You do not want to offer this model to any customer who purchased the previous model within the last year. A rule designates the new model ineligible for any customer who purchased the previous model within one year.

Product Selection: How it Works with Prediction Models and Rules

You must select products within sales predictor before you run prediction model or write rules. Your company catalog contains many products but you may want to select only the top 20% high value products as eligible for prediction and recommendation management.

You must first select products from the Manage Products for Recommendation task. The products that you select here will be available for further selection for model training and rules.

Product Selection for Prediction Models
When you create a model learning job, products selected from the Manage Products for Recommendation task are available for further selection. You can filter products by choosing the right hierarchy level to select either a product group or a specific product. For example, if you want to select the product Xylo TV, you would filter to the appropriate hierarchy level which allows you to select specific products. Model training will run only on the products that you select here.

Product Selection for Rules
If you are writing prediction or eligibility rules, you must select products manually using the list that you already selected from the Manage Products for Recommendation task.

If you want to create a restriction on the products selected using the Manage Products for Recommendation task, you can create a rule for that product. From the products selected, if there is a new product without sufficient transaction history for models to learn on, you can create a rule for the product.

An eligibility rule further restricts the recommendation of products. If a product is not eligible for purchase by certain customers, you can exclude that product from the recommendations for those customers.

Generating Leads Using Predictive Models and Rules: Worked Example

This example shows how to use both the predictive model and prediction rules to generate sales leads.

You are a sales analyst responsible for reviewing, analyzing and measuring North America sales performance. The sales plan for the new quarter
emphasizes selling several servers, and you want to provide high quality leads as soon as possible. You trained the predictive models with the past years’ sales opportunity revenue data and used the model to generate sales leads for the past two quarters. The specific servers your company wants to sell this quarter are:

- 8000RT Servers
- 900VR Servers
- 550VR Servers
- DG 150 Green Servers, a newer product

**Summary of the Tasks**

Generate leads using both the predictive model and prediction rules.

1. Review model reports to see if patterns match the current market conditions.
2. Create prediction rules for products where the model results do not support your business needs.
3. Simulate the product recommendations and decide whether they will generate good leads.
4. If so, generate the leads.

**Analyzing Predictive Models**

1. View the association model report to analyze the predictions.
2. Association model reports show that customers in the high technology industry located in the US tend to buy new products like the DG 150 Green Servers based on past history.

**Creating a Prediction Rule**

Based on the insight from the model report and your business knowledge, you create a rule for this product.

1. In the Tasks region, click Manage Sales Predictor Rules.
2. In the Manage Sales Predictor Rules page, select Rules in the Show field.
3. Click the Create Rule icon and then click Prediction Rule.
4. In the Create Prediction Rule page, enter the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Name</td>
<td>Target High Tech Customers in the US</td>
</tr>
<tr>
<td>Description</td>
<td>US High Technology customers are great sales targets for DG 150 Green Servers. Likelihood-to-buy &gt; 70%</td>
</tr>
<tr>
<td>Start Date</td>
<td>01/06/2012</td>
</tr>
<tr>
<td>End Date</td>
<td>01/06/2013</td>
</tr>
</tbody>
</table>

5. In the Rule Folder field, click New. In the Create Rule Folder page, enter the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folder Name</td>
<td>DG 150 Green Servers</td>
</tr>
</tbody>
</table>
Analyze Sales

13-23

<table>
<thead>
<tr>
<th>Description</th>
<th>Prediction rules for DG 150 green servers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folder Status</td>
<td>Test</td>
</tr>
</tbody>
</table>

**Note**

Change the status to **Production** after you run simulation and you are satisfied with the results. When you set the folder status to **Production**, recommendations based on the rules in this folder are immediately visible in consuming applications.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>01/06/2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>End Date</td>
<td>01/06/2013</td>
</tr>
</tbody>
</table>

6. Click **OK**.

7. In the **Record Type** list, select **Account**.

8. In the **Target Products** region, click the **Select and Add** icon.

9. In the Select Target Products page, search for and add **DG 150 Green Server**.

10. Complete the fields, as shown in this table.

   The application computes likelihood, revenue, and sales cycle estimates based on the model analysis. These values can be used as recommended, as guidance for defining and refining your own values, or overridden entirely in favor of realizing sales objectives.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>DG 150 Green Servers</td>
</tr>
<tr>
<td>Estimated Likelihood to Buy</td>
<td>75</td>
</tr>
<tr>
<td>Estimated Revenue</td>
<td>150000</td>
</tr>
<tr>
<td>Estimated Sales Cycle</td>
<td>40</td>
</tr>
</tbody>
</table>

11. In the Conditions region, select **Recommend the target products to a customer if all the conditions hold** from the **Connective** list.

12. Click the **Add Row** icon.

13. Use selections to enter the following condition: Customer / Country = US.

   Only those attributes that are selected in the Select Model and Rule Entities and Attributes page are available here for selection.

14. Click the **Add Row** icon.

15. Use selections to enter the following condition: Customer / Industry = High Technology.

16. Click **Save and Close**.
Simulating Product Recommendations

Based on the analysis of the model results and the prediction and eligibility rules for the servers, we can conduct a simulation to ensure that the correct customers are targeted for the servers under evaluation.

1. In the Tasks region, click Simulate Product Recommendations.
2. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Type</td>
<td>Account</td>
</tr>
<tr>
<td>Based on</td>
<td>Model analysis</td>
</tr>
<tr>
<td>Rule Folders</td>
<td>Production: Select All. Test: Select the appropriate test folders.</td>
</tr>
<tr>
<td>Note</td>
<td>When you are testing new rule folders, you must check it along with the existing production folders.</td>
</tr>
<tr>
<td>Number of Recommendations</td>
<td>10</td>
</tr>
<tr>
<td>Ranked by</td>
<td>Likelihood to Buy</td>
</tr>
<tr>
<td>Recommended only if likelihood to buy is at least</td>
<td>70%</td>
</tr>
<tr>
<td>Customer Account 1</td>
<td>Pinnacle Technologies</td>
</tr>
<tr>
<td>Customer Account 2</td>
<td>Maple Networks</td>
</tr>
<tr>
<td>Customer Account 3</td>
<td>Serenity Systems</td>
</tr>
</tbody>
</table>

3. Click Simulate.
4. Mouse over each of your target products for each customer to review the likelihood to buy, estimated revenue, and estimated sales cycle.
   The simulation results look to be accurate for the three customer accounts based on your evaluation of the model results for the servers under evaluation. The simulation verifies the model analysis and the rules, instilling confidence in generating and distributing leads. You are confident that generating leads will fulfill your sales objectives for three of the servers.

Scheduling Sales Leads Generation

1. In the Tasks region, click Schedule Sales Leads Generation.
2. Click the Create icon.
3. Complete the fields, as shown in this table.

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Create Sales Leads for West Region</td>
</tr>
</tbody>
</table>
Analyze Leads Generated: Examples

A sales analyst would want to analyze previously generated leads to validate if the leads are being generated as expected. One way to validate this is to simulate product recommendations before generating leads for select customer accounts. However, if the sales analyst is dealing with a large number of customer accounts and products, using the Analyze Leads Generated task is more effective.

The following examples illustrate scenarios where sales analysts analyze the leads that were generated previously.

Customer Accounts

Your company has introduced a new television product called Zylo. Since the product does not have any historical data, you create rules that can specify which customer accounts are eligible for recommendation based on their attributes. You generate leads and later you want to check the leads that were generated for Zylo TV. Although you expected that this product will be recommended to 10 customer accounts, the Analyze Leads Generated report shows that the product was recommended to only eight customer accounts. You review the rules and find that there is an eligibility rule that specifies that the Zylo TV cannot be recommended to customer accounts from UK. You now know that the leads generated were accurate and that no further changes are required.
**Products**

You analyze leads generated to check the number of products that were recommended to the customer account Maple Global. Only 13 products from your sales catalog were recommended to this customer account while you were expecting that 15 products would be recommended. You analyze this further and find that two products were new and there was no sufficient data for model learning to learn on. You then write rules specifying attributes for these two products and generate leads again. When you analyze leads generated, you see that all 15 products were recommended for Maple Global, as expected.

**Using Reports to Analyze the Model: Examples**

You can use reports to analyze predictions and correlations found by predictive models. The following scenarios illustrate how to use these reports.

**Likelihood to Buy Model**

Your company recently released a new line of Green Servers, which have similar specifications as the 750VR Servers. Use the insight from the 750VR reports to formulate prediction rules to generate leads for the Green Servers. Find 750VR Servers in the Likelihood to Buy Model report and click the product name to view model details for the server.

The Top Predictors tab displays the attributes that the prediction model found were influential in contributing to the sale of the product.

- Industry is a profile attribute of high importance, and the report for Industry shows there is a higher chance that the Healthcare, High Technology, and Financial Services industry customers buy this server. On the other hand, the 750VR Servers are not selling well in the Oil and Gas, Retail, and Automotive industries.

- For the Country attribute, the model found that there is a higher chance that customers in Brazil, France, and the United States buy this server. On the other hand, the 750VR Servers are not selling well in Australia and Ecuador.

The Best Profile tab provides the combination of all attributes which comprise an ideal candidate for purchasing the 750VR Server.

**Association Model**

Your company wants to improve sales of the 9800 Green Server product. Since this product has been around for some time, you are mining historical data to review trends. Search for the 9800 Green Server on the Analyze Predictive Models page to review the association model report. The association model report shows three factors that influence buying patterns for the 9800 Green Server:

- 750VR Server product
- High technology customers
High revenue customers

Higher confidence and higher rule support are highly correlated with a customer buying the recommended product. The report shows that high revenue high technology customers are more likely to buy this server. It also indicates that most customers who own the 750VR Server also buy the 9800 Green Server. Based on these associations, create rules to generate leads for the 9800 Green Server.

FAQs for Analyze Sales Performance

What's a model training?

Model training (or learning) is the process of discovering intrinsic structures in the data using a set of algorithms to extract patterns and relationships to make predictions for future cases. The predictive models learn from historical opportunity revenue data and predict what products a customer is likely to purchase next, the estimated revenue, and the projected sales cycle.

When does the model need to be trained?

The model requires initial training to gather and analyze historical data. After that, you can schedule incremental training, depending on how dynamic your sales environment is. You can choose to only process revenue items that closed during more recent sales periods. You can also limit the process to specified product families and sales regions. If your sales history is fairly stable and consistent, you can choose to learn incrementally over a period of time. If there are abrupt changes (such as market conditions, supplies, demand, or seasonality), you can conduct an entirely new model training.

When do I simulate product recommendations?

Prior to generating leads, use simulation to preview what products are being recommended to specified customers from either model or rule predictions, and also check to see if prediction rules are evaluated correctly.

Can I validate recommendations and leads before they are passed on to consuming applications?

Yes, you can validate your model-based recommendations and leads before they appear in consuming applications. The administrator must set the displayModelBasedRecommendations configuration parameter to False so that the model-based recommendations and leads do not show in consuming
applications. For rule-based recommendations, you can set the folder that contains the active rules to Test to ensure that these recommendations and leads are not passed on to consuming applications.

**What's the difference between eligibility rules and prediction rules?**

Criteria in an eligibility rule define when a customer is eligible or ineligible for a specific product or product group. Analytical calculations process eligibility rules first before prediction rules to eliminate ineligible customers from further calculations. For example, customers who purchased your Model 1000 microscope within the last year are ineligible to purchase the new Model 2000.

You create prediction rules, based on your industry or product expertise, to identify products to sell to customers who meet predefined conditions. Prediction rules are an alternative to using the statistical model to generate predictions and leads. For example, use prediction rules when new products are introduced, to promote products with a poor sales history, or to push products to align with marketing initiatives. For example, recommend the new Model 2000 to customers who purchased your Model 1000 microscope three or more years ago.

**What happens if a prediction rule conflicts with another prediction rule?**

If two or more prediction rules overlap or conflict, then the prediction rule with the most recent update date takes precedence.

In this example, two rules overlap:

- Rule 1
  - Customers in the United States
  - Target product: Model 2000 microscope
- Rule 2
  - Customers in the East United States
  - Target product: Model 2000 microscope

If Rule 2 is edited last, then Model 2000 microscope predicted metrics for East US customers override those from Rule 1 when the lead generation process is executed. The predicted metrics defined for Rule 1 apply to leads generated for customers within the US but not in the East US.

In this example, two rules conflict:

- Rule 1: Customers not in US target Microscope 2000 (essentially position this product to all customers everywhere but in the US)
- Rule 2: Customers in US target Microscope 2000
The conflict between rules in this case, results in leads generated for Model 2000 to all customers (US or otherwise), which is not be the intent. Each rule works to undermine the objective of the other.

**What happens if an eligibility rule conflicts with a prediction rule?**

Eligibility rules are always evaluated first before prediction rules. For example, if an eligibility rule says a customer is ineligible for a certain product, then the customer is ineligible regardless of whether or not that customer is targeted for that particular product in the prediction rule.

**Can I assign the new rule to another folder from the Create Prediction Rule or Create Eligibility Rule page?**

Yes. You can change the folder name, start and end dates, and the Active status from the rules create page as long as the attributes satisfy the conditions of the parent folder.

**When do I enter product recommendation estimates for a sales prediction rule?**

For each product that you recommend in the prediction rule you create, the application provides calculated estimates for each of the three predictions: likelihood to buy percentage, sales revenue, and sales cycle in days. These serve as a guideline for current sales performance of the product. You can override these predictions using your expert knowledge of the market.

If the product or product group is new or has insufficient past sales data, then no estimates are provided. You must enter estimates based on your market expertise.

**What's a current model quality?**

A number from 0 to 100 indicates the predictive power of a model. The higher the model quality value, the more impact the resulting predictions will have against a random sampling of events. Therefore, the products with higher model quality can be targeted and prioritized to prospective customers, improving sales success.

**What's an overall importance?**

Importance is the degree to which an attribute and an outcome show a tendency to vary together. Overall importance is the usefulness or correlation of an attribute identified through the predictive model.
Can I run multiple sales leads generation processes simultaneously?

No. Only one leads generation process, or the model training process, can run at a time. Your submitted process goes into the queue to run after the process currently running completes.

Why are model-based recommendations or leads not visible in consuming applications?

Model-based recommendations or leads might not be visible in consuming applications because the configuration parameter `displayModelBasedRecommendations` might be set to False. Alternately, recommendations and leads that are based on average win rates might not be appearing in consuming applications if the configuration parameter `enableAvgWinRateRecommendations` is set to False. The administrator should set these parameters to True for all model-based recommendations and leads to appear in consuming applications.
Manage Partner Accounts

Partner Registration: Overview

There are two methods by which a customer can become a partner. Prospective partners or companies interested in partnership with the channel organization can use the Self Service Partner Registration business process flow to submit a customizable application to become a registered partner. The channel organization can also manually create a partner from a new or existing customer.

Partner Self Service Registration Process

The corporation or company gets information on partnership and partner programs from the channel organization, through marketing campaigns, events, online web presence, partner recruitment initiatives from the channel sales organization, and so on. The corporation or company decides to apply for a partnership with the channel organization. In order to apply for partnership, the corporation or company must first register on the channel organization’s registration site. The registration process broadly includes the following steps:

1. The corporation or company seeking partnership provides information such as their corporate address and primary contact details.

2. The corporation or company seeking partnership provides additional details, such as: number of employees, revenue, area of product expertise.

3. The corporation or company seeking partnership provides reviews and submits the application.

4. The channel organization approves the partner registration and provisions the corporation or company seeking partnership in the application. The corporation or company receives an e-mail notification with approval information, login details, channel organization contact information, and details about how to manage profiles, and enroll into programs (if enabled).

5. If the channel organization has partner programs enabled, the corporation or company seeking partnership can enroll in a program.

Important
The user name you provide must be unique.

**Channel Organization Partner Registration Process**

The channel organization decides to create a partnership with a new or existing customer. The registration process broadly includes the following steps:

1. The channel administrator manually creates a partner in the channel organization’s application for the new or existing customer. The channel organization can select either Prospective or Registered as a partner status.

2. When the channel organization creates this new partner, the application performs a duplication check based on the company name and address provided in the partner profile. If the duplication check detects a similar company name, the channel manager must decide whether to use existing company name and address or to continue the partner creation process with the new company name and address.

3. The channel administrator activates the partner in Oracle Sales Cloud partner management.

**Modifying Partner User Profile: Points to Consider**

Once a prospective partner registers, the partner will initially have limited access to the Partner Portal. Partner administrators can do the following:
- Login to the Partner Portal to access their personal profile
- View and edit profile information such as e-mail address, password, and some personal preferences.

**Modifying Personal Information**

Partner users can view and edit their personal information, view and edit their opt in setting, and change their password and security questions. They can update personal information like name, title, country, and so on. They can reset their password and change their security questions and answers.

**Managing Attachments: Explained**

An attachment is a document file or URL that is related to a partner account. Attachments are used to upload, download and store content specific to a partner. A channel user can view attachments associated with a partner account. Depending on security privileges they may also be able to add, delete, and update attachments. Partner administrators can also view attachments uploaded to partner profiles.

**Types of Attachments**

The different types of attachments are:
- Desktop File: This can be any type of file created in a third party application. (such as MS Word, MS Excel, PDF, and so on)
- URL: A link to a web page on the Internet or intranet
• Text: Plain text can be added to an object.

Oracle Sales Cloud Partner Management: Explained

Oracle Sales Cloud partner management is a work area that serves a central point to manage partner profiles, members, account teams, program enrollments, tasks, interactions, leads, opportunities, and to analyze the performance of each partner.

Channel account managers and channel operations managers can manage their partners effectively and efficiently by having complete information for each partner in a single place. They can manage the partner profile, partner members, track partner tasks and interactions, view leads and opportunities of each partner. Channel managers use the partner profile information to differentiate partners, decide whether a partner should be upgraded or downgraded, and provide better support and services, such as marketing funds, incentives, and opportunities. Partner administrators benefit from self service access to Oracle Sales Cloud partner management to update partner profile, administer the partner users, and review the program enrollments of their company.

Partner Lifecycle: Explained

The partner lifecycle represents a partner’s progression through various phases, including prospective, registered, active, expired, and terminated.

Prospective

When a customer submits a partner registration, this status is assigned automatically. When the channel organization creates a new partner or converts an existing customer to a partner, this status can be manually assigned during the creation process.

Registered

When the channel organization approves a customer’s partner registration, this status is assigned automatically. When the channel organization creates a new partner or converts an existing customer to a partner, this status can be manually assigned during the creation process.

Active

When a customer has submitted a partner registration to a channel organization that uses partner programs, and the customer’s enrollment is approved, this status is assigned automatically. If your channel organization does not use partner programs, this status can be assigned manually in Oracle Sales Cloud partner management interface after the registration is approved. When your channel organization creates a new partner or converts an existing customer to a partner, this status can be assigned manually in the partner management interface.
**Expired**
This status is assigned by the application when a partner's enrollment in all programs has expired. The status can also be manually assigned by the channel organization.

**Terminated**
This status is manually assigned by the channel organization. The channel organization should remove all job and duty roles from partners in Terminated status.

**Creating Partner User Accounts: Explained**

When you create a partner user, you enable the partner member to access and use the deploying company's resources for working on assigned tasks. You also assign job and security roles to the partner member's user profile and specify the organization to which the new user needs to belong.

**Assigning Job and Security Roles to Partner Users**
Every partner user needs to have an assigned job role. This job role can be used to create security roles for the user. Based on the security roles you assign, the user can access applications, locations, and data within the deploying company. You may choose to assign security roles automatically to a user; you can also assign additional security roles individually if needed.

**Assigning Partner Users to Organizations**
While assigning non-manager partner users to organizations, you can either select an organization or a manager. Once you select an organization, the manager of the selected organization becomes the new user's manager. Similarly, once you select a manager, the new user automatically becomes a member of the organization to which the manager belongs.

**Assigning Manager-Level Partner Users to Organizations**
If the role of the new user is that of a manager, you need to assign the new user to an organization even after specifying a manager. This is because you granted the new user a managerial role, and you now need to specify the organization that the new user needs to manage. You can either select an organization from the list of available organizations, or you can create a new one if required.

**Importing Partners Using File-Based Import: Explained**

This topic explains how to prepare and import partner data from an external data source into Oracle Sales Cloud using the File-Based Data Import feature. A partner is an independent corporation that works with one or many channel organizations. A partner engages with a channel organization in many ways, such as sales, service, influence, support, and so on. You enter your partner information using the Partners work area or you can import data to create new or update existing partners.

Consider the following questions when importing your data:
• How does your legacy or source system structure the partner information compared to how Oracle Sales Cloud represents the same data?
• Do you have to configure values in Oracle Sales Cloud to map to your data values?
• Do you have to customize Oracle Sales Cloud to capture additional attributes that are critical to the way you do business?
• What import features are available for importing your business object?
• How do you verify your imported data?

Comparing Business Object Structures

You must understand how your partner data corresponds with the data in Oracle Sales Cloud to be able to map your legacy data to the data needed by Oracle Sales Cloud services. First, you must understand how Oracle Sales Cloud represents the structure of the data for a partner.

In Oracle Sales Cloud, partner information is organized into specific nodes in the Oracle Sales Cloud partner management interface. These nodes include the partner profile, the partner public profile, partner members, partner interactions, partner program enrollments, tasks, notes, and contracts. This hierarchical structure supports one-to-many relationships between the components that make up the partner object. For example, a partner can have many partner members, tasks, and enrollments.

The Partner Profile and Public Profile are organized into regions that provide basic information about the partner, such as the partner organization name, current status, key details about the partner, such as the partner type and level, and additional information about the partner such as industries and geographies served, product specialties, expertise, and certifications.

The Partner Members node is organized into regions that provide detailed information about each partner member. The Person Details region provides the contact name and contact preferences for phone, and e-mail. You can use the User Details region to create the contact as an Oracle Sales Cloud user account, as an Oracle Sales Cloud resource, or as both.

You use the Interactions node to list the interaction history that you have with the partner and to create new interactions with the partner.

The Enrollments node displays information about the partner programs in which the partner has enrolled, such as the enrollment participants in the partner organization, enrollment contracts for the partner program, and any attachments with enrollment information about the partner program.

Import Objects for Partners

To facilitate the import of partners, Oracle Sales Cloud has organized the structure of the partner into import objects. The import objects for partners are shown in the following table.

<table>
<thead>
<tr>
<th>Import Objects</th>
<th>Structure</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile and Public Profile</td>
<td>Industries Served, Expertise, Geographies Served, Product Specialties, Certifications, Attachments, Contact Points, Addresses</td>
</tr>
<tr>
<td>Partner Members</td>
<td>Contact Points, Contact Preferences</td>
</tr>
<tr>
<td>Interactions</td>
<td>Type, Resolution, Related To, Partner, Contacts, Resources, Attachments, Extensible fields</td>
</tr>
</tbody>
</table>
Comparing Business Object Data

Each import object is a collection of attributes that helps to map your data to the Oracle Sales Cloud data and to support one-to-many relationships between the structural components that make up the partner object.

A good understanding of the attribute details of the import objects is critical to preparing your import data. The reference guide files contain descriptions, logic used to choose default values, and validation information for each of the Oracle Sales Cloud attributes. The validation information includes the navigation to the task where you can define values in Oracle Sales Cloud. For example, if you have values in your data that correlate to a choice list in Oracle Sales Cloud, then the validation information for that attribute provides the task name in the Setup and Maintenance work area where you can define your values. For additional information, including a list of reference guide file names and locations that you need to complete this task, see the following table.

<table>
<thead>
<tr>
<th>Import Object</th>
<th>Related Import Object Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Profile and Public Profile</td>
<td>Partner Import Objects: How They Work Together</td>
</tr>
<tr>
<td>Partner Members</td>
<td>Partner Contact Import Objects: How They Work Together</td>
</tr>
<tr>
<td>Interactions</td>
<td>Partner Interaction Import Objects: How They Work Together</td>
</tr>
<tr>
<td>Partner Program Enrollments</td>
<td>Partner Program Enrollment Import Objects: How They Work Together</td>
</tr>
<tr>
<td>Tasks</td>
<td>Task Import Object and Attributes: How They Work Together</td>
</tr>
<tr>
<td>Notes</td>
<td>Note Import Object and Attributes: How They Work Together</td>
</tr>
<tr>
<td>Contracts</td>
<td>Importing Contracts: Explained</td>
</tr>
</tbody>
</table>

Hint: You can use the keyword importing partners to search for related topics in Oracle Sales Cloud Help.

Extensible Attributes

If you need to extend the partner object to import your legacy or source data, you must use Application Composer to design your object model extensions and to generate the required artifacts to register your extensions and make them available for importing. The corresponding import object is updated with the extensible attributes, which can then be mapped to your source file data. You can use the same source file to import both extensible custom attributes and the standard import object attributes.
Importing Partners Using File-Based Data Import

For the partner business object, you must use the File-Based Data Import feature. You prepare XML or text source data files in a form that is suitable for file-based import. The file-based import process reads the data included in your source file, populates the interface tables according to your mapping, and imports the data into the application destination tables. The Define File-Based Data Import Setup and Maintenance task list includes the tasks needed to configure the import objects, create source-file mappings, and schedule the import activities. You submit file-based import activities for each import object. When creating new partners, you first import the Partner import object, followed by subsequent import activities for each of the other import objects. The exception is attachments, which are imported by including the file names in your source file for the Partner import object and selecting the files when defining the import activity. You must be assigned the Channel Partner Portal Administrator or the Customer Relationship Management Application Administrator job role to access and submit the import activities for marketing campaigns.

Verifying Your Imported Data

Oracle Sales Cloud provides File-Based Import activity reports, which can be used to verify imported data. Users with either the Customer Relationship Management Application Administrator or Channel Partner Portal Administrator role can also navigate to the partner management interface to view the imported partners.

Partner Import Objects: How They Work Together

You use three main import objects, Partner, Partner Contact, and Enrollments when you submit a file-based import activity to import your partner data. This topic describes the Partner import object. It introduces the following:

- Target import object concepts
- Target objects for the Partner import object
- Target import object attributes
- Target object attribute reference guide files

Target Import Object Concepts

The Partner import object is used to import partner information to populate the partner profile and partner public profile. The Partner import object is split into separate target import objects for organizing the individual attributes of the different aspects of the partner profile and partner public profile. To map the source data in your import file to the target attributes in Oracle Sales Cloud, you must understand how the target objects are related and what attributes are included in each target object.

Partner Target Import Objects

The target import objects in the Partner import object are generally grouped into basic information about the partner, such as the partner organization name, and current status; key details about the partner, such as the partner type and level;
and additional information about the partner, such as industries and geographies
served, product specialties, expertise, and certifications.
The following diagram shows the import objects for the Partner import object.

Target Import Objects Attributes
You must compare the attributes that you want to import with the target object
attributes that are available and their valid values. To evaluate your source data
daughty Oracle Sales Cloud attributes for mapping and validation, you use an Oracle
Enterprise Repository reference guide, which is available for each target import
object. The reference guide file includes attribute descriptions, default values
and validations performed by the import process. Review the validation for each
attribute to determine whether there are functional prerequisites or setup tasks
that are required.

To import your source file data, you define a mapping between your source file
attributes and the combination of the target object and target object attribute.
You can predefine and manage import mappings using the File-Based Import
Mapping task, or you can define the mapping when you define the import
activity using the File-Based Import Activity task. Both tasks are available in the
Setup and Maintenance work area.

Note: If any of the attributes you want to import do not have an equivalent
target object, then review the Application Composer extensibility features for the
Partner object.

Target Import Objects Attributes Resources
To access the reference guide files for the partner’s target import objects, see the
File-Based Data Import assets in Oracle Enterprise Repository for Oracle Sales
Cloud (http://fusionappsoer.oracle.com).
The following table lists the reference guide files that are available from the
Documentation tab for the Partner File-Based Data Import asset.

<table>
<thead>
<tr>
<th>Target Import Object</th>
<th>Description</th>
<th>Reference Guide File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PartnerHierarchy</td>
<td>Provides information about the hierarchical structure of the partner relationship</td>
<td>HZ_IMP_HIERARCHIES_T_Reference</td>
</tr>
<tr>
<td>PartnerInterface</td>
<td>Provides a variety of information used to populate the partner profile and partner public profile</td>
<td>HZ_IMP_PARTIES_T_Reference</td>
</tr>
<tr>
<td>Fax</td>
<td>FAX number for the partner</td>
<td>HZ_IMP_CONTACTPTS_T_Reference</td>
</tr>
<tr>
<td>PrimaryAddress</td>
<td>Partner primary address</td>
<td>HZ_IMP_PARTYSITES_T_Reference</td>
</tr>
<tr>
<td>PrimaryPhone</td>
<td>Partner primary phone number</td>
<td>HZ_IMP_CONTACTPTS_T_Reference</td>
</tr>
<tr>
<td>ImpPartnerP</td>
<td>Provides a variety of information used to populate the partner profile and partner public profile</td>
<td>ZPM_IMP_PARTNER_Reference</td>
</tr>
</tbody>
</table>
Partner Contact Import Objects: How They Work Together

You use three main import objects, Partner, Partner Contact, and Program Enrollments, when you submit a file-based import activity to import your partner data. This topic describes the Partner Contact import object. It introduces the following:

- Target import object concepts
- Target objects for the Partner Contact import object
- Target import object attributes
- Target object attribute reference guide files

Target Import Objects Concepts

The Partner Contact import object is used to import the contact information to populate the Partner Members node in Oracle Sales Cloud partner management tree. To map the source data in your import file to the target attributes in Oracle Sales Cloud, you must understand how the target objects are related and what attributes are included in each target object.

Partner Contact Target Import Objects

The target import objects in the Partner Contact import object provide key contact information for the partner organization, including how they can be contacted, such as by phone, e-mail, or FAX, and the way that they prefer to be contacted.
The following diagram shows the import objects for the partner contact import object.

The Partner Members node is organized into regions that provide detailed information about each partner member. The Person Details region provides the contact name and contact preferences for phone and e-mail. You can use the User Details region to create the contact as an Oracle Sales Cloud user account, as an Oracle Sales Cloud resource, or as both.

**Target Import Objects Attributes**

You must compare the attributes that you want to import with the target object attributes that are available and their valid values. To evaluate your source data and Oracle Sales Cloud attributes for mapping and validation, you use an Oracle Enterprise Repository reference guide, which is available for each target import object. The reference guide file includes attribute descriptions, default values and validations performed by the import process. Review the validation for each attribute to determine whether there are functional prerequisites or setup tasks that are required.

To import your source file data, you define a mapping between your source file data and the combination of the target object and the target object attribute. You can predefine and manage import mappings using the File-Based Import Mapping task, or you can define the mapping when you define the import activity using the File-Based Import Activity task. Both tasks are available in the Setup and Maintenance work area.

**Note**

If any of the attributes you want to import do not have an equivalent target object attribute, then review the Application Composer extensibility features for the partner contact.

**Target Import Objects Attributes Resources**

To access the reference guide files for the partner contact’s target import objects, see the File-Based Data Import assets in Oracle Enterprise Repository for Oracle Sales Cloud (http://fusionappsoer.oracle.com).

The following table lists the reference guide files that are available from the Documentation tab for the Partner Contact File-Based Data Import asset.

<table>
<thead>
<tr>
<th>Target Import Object</th>
<th>Description</th>
<th>Reference Guide File Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>PersonProfile</td>
<td>Consumer information</td>
<td>HZ_IMP_PARTIES_T_Reference</td>
</tr>
<tr>
<td>Email</td>
<td>Consumer e-mail</td>
<td>HZ_IMP_CONTACTPTS_T_Reference</td>
</tr>
<tr>
<td>Fax</td>
<td>Consumer FAX</td>
<td>HZ_IMP_CONTACTPTS_T_Reference</td>
</tr>
</tbody>
</table>
### Automatic Role Provisioning: Explained

Automatic role provisioning is the process by which security roles are granted to a user based on the user’s resource role.

Resource roles capture the nature of work intended to be performed by the partner user. As a result of automatic role provisioning, a range of security roles are granted to the new user. This enables users to access applications flows that are crucial for performing the tasks related to their resource roles.

Once the list of assigned security roles is populated, you can choose to remove roles or add new ones individually as needed.

### Tasks: Explained

Tasks are used to organize, track, and resolve a variety of ‘To Do’ items, such as: assigning leads to a partner or following up on a partner’s performance in a partner program. Tasks can only be viewed by channel users.
The channel account manager can create, search, update and delete tasks. Tasks can be used to:

- Support a priority, a category like phone, meeting and so on. Tasks can be related to a business object such as lead or opportunity
- Indicate percentage complete values
- Track business object such as a lead or opportunity.

Partner Assignment to Opportunities: Explained

Much like any other internal resource, partners can be added or removed from the opportunity team manually. However, the resource picker displays only partner resources whose partner organization is already associated with the opportunity. The same behavior is applied when choosing a partner resource for credit allocation purposes.

Partner Opportunity Assignment

After a partner is added to a revenue line, the next step is to assign matching territories to the revenue line and relevant resources to the opportunity sales team. Partner territories and Partner Program territories (territories of type equal to Partner or Partner Program) are not assigned to opportunities, since they are not used to drive territory forecasting, metrics, or reporting. However, other territories, such as Prime, Overlay, Channel Sales Manager territories, and territories of custom defined types are assigned based on matching dimensional attributes on the revenue line, much like an internal sales opportunity. The treatment of a territory in terms of post-assignment, such as the side effect of adding territory owner or members to the opportunity team, is the same as that of an internal sales territory.

Partner resources cannot be removed from the opportunity team if the resource is receiving nonrevenue credit on a revenue line on the opportunity. To remove the partner, first you must remove the credit allocations he is assigned. When a partner organization is removed from the opportunity and no resource from that partner is receiving credits on the opportunity, all partner resources, if they exist, are automatically removed from the opportunity team.

Sales Credits and Partners

Partner resources are only eligible to receive nonrevenue credits on opportunity revenue. When selecting sales credits for partner resources, only partner resources whose partner organization is associated with the revenue line are eligible for sales credits. Partner resources are also not eligible for deal protection.

FAQs for Manage Partner Accounts

When do I register as a partner in a supplier organization?

You can register as a partner after reviewing the supplier’s web site and browsing for available partner programs that may interest you. You can discuss
additional details about partner programs with the channel team before you register.

**Can I download terms and agreements?**

Yes. The prospective partner must read and agree with the terms and agreements before submitting the registration application. Click **Download Terms and Conditions** to view, save, or print the terms and conditions in a separate window.

**How can I gather partner profile information?**

Partner profile information is usually gathered through the self service partner registration. This information can be entered by the channel managers of a supplier or brand owner company. The partner profile information enables the channel managers to understand and differentiate their partners in order to provide appropriate sales support and incentives for maximizing the channel sales.

Some of the partner profile this information can also be derived from partner sales transactions like closed partner opportunities revenue last year, or partner data stored in external sources. Some partner profile information can be updated by the partner user or administrator.

**What's a Partner Profile?**

A partner profile contains partner specific information like company phones, fax, web site, address, industry, geography coverage, partner company description, company number, industries served and so on. Each Vendor or Brand Owner Company will have a different set of partner profile they would like to capture, for example, number of sales employees, tax id, certifications, opportunities closed last year information.

**Can I cancel a partner registration?**

Yes. At any point during the registration flow, the prospective partner can cancel a partner registration process. All the information entered will be lost at the time of cancellation.

**Why am I unable to provision user accounts for the partner members I create?**

Only approved or active partner companies can create user accounts. If you belong to a prospective or registered partner company, you can create partner members but cannot create user accounts.
Why am I unable to select an organization once I have selected a manager while creating user accounts for my partner company?

If you are creating a member user, the manager information is automatically populated once you choose the organization to which the user needs to belong. However, if you are creating a manager user, you need to specify the organization that you want the new user to manage. If required, you can also create a new organization for the new manager user.

Why can I not see a complete list of roles when I assign security roles to my partner users?

When you assign security roles to your partner users, the screen displays only those roles that are enabled for your profile or which can apply to the job role you chose while creating the user.

Manage Partner Enrollment

Partner Program Enrollment: Overview

If the channel organization offers partner programs, a partner can enroll into a partner program and receive the benefits associated with the program. From the Partner Home Page, a partner can select the product catalog, review the various programs within the catalog, and begin the enrollment process.

The process of enrolling into a partner program involves the following:

1. Select the partner program from a program catalog listed on the Partner home page.
2. Confirm basic information like the organization, language, terms of contract, and so on.
3. Select a start date for the enrollment.

Note

The start date cannot be past or prior to the active dates of the partner program. If the partner does not specify a start date, the approval date of the enrollment is taken as the start date for the enrollment.

4. Complete the questionnaire.
5. Accept the agreements associated to the partner program.
6. Review and submit the partner program enrollment request.
Partner Program Enrollment Statuses: Explained

A partner program enrollment goes through many statuses during its lifecycle. An enrollment can be in any of the following statuses:

- Approved
- Expired
- Renewed
- Rejected
- Terminated
- Pending Approval

**Approved**
The enrollment is active and is within the date of expiration for the program.

**Expired**
The enrollment end date has gone beyond the end date of the program.

**Renewed**
The partner has renewed the enrollment.

**Rejected**
The enrollment request was rejected. Approvers can reject or approve an enrollment at their discretion based on the contract, responses to questionnaire, and so on.

**Terminated**
The enrollment was terminated. Termination can occur at the supplier’s discretion or when a program is decommissioned.

**Pending Approval**
The partner has submitted a request for enrollment, but the enrollment has not yet been approved.

Partner Program Manager Territory and Partner Enrollment Territory Components: How They Work Together

The process of defining a partner program enrollment territory involves two steps:

- Define a partner program manager territory.
- Define a partner program enrollment territory.

**Define a Partner Program Manager Territory**
This is a manual step where channel program managers must use the Territory Management user interface to create a territory of type "Partner Program Manager". They need to define the jurisdiction of the program territory. The territory dimensions are defined in the Territory Management user interface.
Typically each program will correspond to one territory; however, a program can have multiple territories. The typical dimensions are:

- Industry: Finance, Pharma, and so on.
- Geography: North America, Europe, and so on.
- Sales Channel: Reseller, Distributor, and so on.
- Products: Supplier’s products.

Define a Partner Program Enrollment Territory

When a partner enrolls into a partner program and the enrollment is approved, a Partner Program Enrollment Territory is created manually as a child territory under the corresponding Partner Program Manager Territory. The Partner Program Enrollment Territory should conform to the dimensional boundary associated with the Partner Profile and the Partner Program Manager Territory.

Renewing a Partner Program Enrollment: Points to Consider

A partner may wish to renew a partner program enrollment to continue to enjoy the benefits associated with the program or to gain a specific benefit that is available only at the time of renewal.

The channel organization can renew a partner’s enrollment in a program when the enrollment is not in the expiration term (the defined number of days before an enrollment expires) or when the partner enrollment is in Terminated status. This feature is only available to the channel organization.

Renewal Process

Partner program enrollment renewal is available as follows:

- within the expiration term, to partners
- outside the expiration term, or for Terminated programs, to the channel organization.

The process is the same for both instances: select Renew from the Action menu on the Enrollment Details page in the Partner tree Enrollments node. The renewal process is identical to the enrollment flow and is approved by the channel organization. On approval, the enrollment starts on the approval date, and remains in effect for the term specified in the program.

Terminated Programs

If a program is terminated or decommissioned, no partners can enroll or renew an enrollment.

FAQs for Manage Partner Enrollment

Can I add questions to a questionnaire?

Channel partner managers can add, modify, or delete questions from a questionnaire. The questionnaires collect key information that will be used to
assess the application for partner program enrollment. The questions will also help the partner manager to manage the transactions after the enrollment is complete.

**What's a decommissioned partner program?**

A decommissioned partner program is a program that has been deactivated or terminated by the channel organization. Decommissioned partner programs are not available for enrollment.

**What's a partner program enrollment term?**

Partner programs can have terms with a duration specified in days, months, or years. When a partner enrolls in a partner program, the partner must apply for renewal by the end of the term. An enrollment can also be set up for automatic renewal. An enrollment term can be null. In such a case, a program enrollment has no term.

**Manage Partner Programs**

**Partner Program Approval: Explained**

The overall business process of reviewing and approving a partner program is managed by the approver. The overall process is as follows:

The approver receives a notification and opens the item, reviews the summary, benefits, budget, fees, and eligibility. The approver may then approve or reject the item. When partner program is approved, the channel partner manager releases the program on the site for enrollment and updates the program summary.

**Note**

The approval process may take days, weeks, or months to evolve to the point where the programs are ready for approval and release.

**Partner Program Actions and Status: Explained**

A partner program can be in different statuses during its lifecycle. The actions you can take on a program are determined by the program’s current status.

Partner program actions include the following:

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Create</td>
<td>Select this action to create a new partner program.</td>
</tr>
</tbody>
</table>
### Program statuses include the following:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Draft</td>
<td>This status indicates that a partner program is a work in progress. The channel organization sets the status of the partner program to draft status while defining the elements of the partner program. Programs in Draft status can be channel organization deleted by the channel organization.</td>
</tr>
<tr>
<td>Submitted</td>
<td>This status indicates that the channel organization has defined the elements of a partner program and has submitted the program for approval within the channel organization’s hierarchy.</td>
</tr>
<tr>
<td>Rejected</td>
<td>This status indicates that the partner program was not approved by the channel organization. Once a partner program has been submitted, the approver can reject the program.</td>
</tr>
<tr>
<td>Unpublished</td>
<td>This status indicates that the partner program has been approved by the channel organization’s approver, but the status has not been changed to Published. The partner program remains in unpublished status until the channel organization changes the status to Published.</td>
</tr>
<tr>
<td>Published</td>
<td>This status indicates that the partner program is an active partner program and is open for enrollment to partners.</td>
</tr>
<tr>
<td>Terminated</td>
<td>This status indicates that the partner program has been discontinued by the channel organization. The channel organization can discontinue a partner program at any time.</td>
</tr>
</tbody>
</table>
Additionally, the channel organization can review partner programs that are in Draft, Published, Unpublished, or Terminated status.

Defining a Partner Program: Overview

The overall business process for defining a partner program involves the following steps:

1. Create or Update a Partner Program.

   The partner program manager defines the case for the program, indicating the anticipated benefits, and costs to maintain the program over its term. The scope of availability (Languages or Jurisdictions) of the program will be determined. The channel partner manager optionally establishes goals or targets like: enrollments, units sold through, market coverage growth. The channel partner manager works with a number of internal functions like channels marketing, strategy, operations, and business practices to define the characteristics and proposed rollout schedule of a program.

2. Define or update program summary.

   The channel partner manager defines the program summary information and sets the program to Draft status. The program can be partially saved at any point in the process. The channel partner manager designs the offering that will appear on the portal in order to position and sell the program to prospective partners. The offering can be presented in more than one language, in which case, the user may have to switch to the language they want to use.

3. Define or Update Contract Terms and Conditions (optional).

   The legal department defines any proposed agreement language that must be executed by the partner. These agreements and amendments travel through an internal review process where the context for the agreement is reviewed with Legal. The legal team decides on the appropriate legal terminology to use in the program.

4. Define or update Legal Agreements.

   Design and create the template for the legal agreement.

5. Define or update Eligibility.

   The channel partner manager defines the proposed eligibility for the program in a given segment of the market.

6. Define or update Benefits.
The channel partner manager optionally defines the proposed benefits for the program.

7. Define or update Objectives.

The channel partner manager optionally defines the goals for the partner program enrollments, program margin, and so on.

8. Define or update Questionnaires.

The channel partner manager optionally defines one or more questionnaires to be used during enrollment. These questionnaires collect key information used to assess the application for enrollment and to gather key attributes.

9. Associate Legal Agreements.

Once the Legal Department has created the agreement templates to support the program, the channel partner manager associates the appropriate agreements with the program.

**Note**

Additional attributes set by the channel partner manager include the method of agreement execution as being online-click, offline, or both.

10. Submit for Approval.

The channel partner manager reviews and submits the partner program for approval, and changes the status to Submitted.

11. Review Program for Approval.

Workflow approvals are then submitted to the manager to review the program as defined, and approve the program for release or publication. The approver does the following:

a. Receives a notification of pending workflow item.

b. Opens the item and reviews the summary, benefits, budget, fees, eligibility, and so on.

c. Approves, rejects, or publishes the program.

Once approved, the channel partner manager can release the program.

**Creating an Objective: Overview**

Channel partner managers can define objectives for a partner program. These objectives help establish well defined targets or goals for the partner or the partner program. The partner program objectives can have a number of key attributes. For example, objectives can be fiscal, training requirements, number of leads registered, and so on. The partner program summary displays the goals and the progress made against these goals. Some of the key attributes of an objective are:
• Description: The channel partner manager describes the objective. The maximum number of characters is 4096

• Period Type: Dimension to be used for evaluation. For example, Quarter, Month, Year

• Period: Period used for evaluation. For example, Quarter, Month, Year.

**Note**

The period set name is not required, if the objective is constant.

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**Partner Program Benefits: Examples**

A program manager can define tangible benefits for a partner program such as:

- Additional incentives for deal registration
- Access to product sales and marketing collateral
- Enrollment in the developer network
- Free training
- Platinum support.

**Scenario**

A program manager is creating a partner program with benefits like free training and platinum support.

**Objectives: Examples**

Objectives for a program lists the targets or goals for the program or partner. Some examples for an objective are:

- Generate a revenue from indirect channel for a product or set of products
- Expand geographic reach (emerging markets)
- New Product Launch
- Ramp up the number of trained & certified System Integrators (SIs) to support product implementations
- Allocate Partner Tier (Gold, Silver, Bronze).

**Scenario**

You have created a program with an objective to promote or launch your new product.
FAQs for Manage Partner Programs

Can I create a benefit?

Program managers can define the partner program benefits. They can highlight the value of the program to the partners. Partners are eligible for benefits once their enrollment into a partner program is approved.

What's a partner program?

A partner program enables channel partner managers to define program objectives and provide various benefits to partners to encourage them to enroll into the programs. A partner program can be created to address objectives such as: generate revenue from an indirect channel for a product or a set of products, expand geographic reach (emerging markets), new product launch, provide training, and so on. A partner program can be in Drafts, Published, Unpublished, or Terminated status.

A partner program can consists of the following artefacts:

- Program objectives that are aligned with the channel strategy
- Program benefits that provide incentives to partners
- Program questionnaire to gather information from potential partners to determine their eligibility
- Legal terms and conditions as part of the program agreements. These are crafted in collaboration with the channel operations and legal team
- Program measures against which the partner performance will be evaluated.

What's the role of a program manager?

Program managers create and maintain partner programs and define the associated benefits, objectives, enrollment questionnaire, and other criteria of the programs. They can view the partner program enrollments and participants in a partner program. Knowledge of the partners who have enrolled and other statistics, like number of partner program enrollments, will give a program manager insight on how the program is being received. A program manager may terminate a partner program at any time during or after the time period, or active end date has passed for a partner program. The channel partner manager identifies the resource who will be the program manager.

What's a benefit value?

The benefit value associated to the partner program. A benefit can be associated with the following types of values:

- Boolean: For example, Yes or No for free training
• Number: For example, Platinum Support for first five issues.

**What's the difference between a partner objective and a partner program objective?**

A partner objective is an objective only assigned to a partner. A partner program objective applies for the entire partner program.
Oracle Fusion CRM for Microsoft Outlook: Overview

The Oracle Fusion CRM for Microsoft Outlook (CRM for Microsoft Outlook) application helps maximize sales productivity by providing Oracle Fusion CRM capabilities directly within Microsoft Outlook, thereby allowing sales professionals access to essential CRM data.

Summary of Features
The key features of Oracle Fusion CRM for Microsoft Outlook include the following:

- CRM capabilities within Microsoft Outlook: Using CRM for Microsoft Outlook all e-mails, calendar events, and tasks can be linked to the respective contact, customer, lead, or opportunity within Oracle Fusion CRM. Sales professionals can access and update customer and sales information within Microsoft Outlook.

- Single-click sharing between Microsoft Outlook and Oracle Fusion CRM: When sending a meeting invite or an e-mail, or when setting up a task, a single click on the Share with Fusion button captures the action and updates Oracle Fusion CRM in the background.

- Synchronization of data between Oracle Fusion CRM and Microsoft Outlook: Two-way data synchronization allows sales professionals to have a continuously updated and accurate 360-degree view of CRM data changes.

- Synchronization Control Panel: CRM for Microsoft Outlook provides synchronization filtering capabilities, enabling the sales professional to synchronize only the most critical data from Oracle Fusion CRM, such as high-priority accounts, or opportunities closing this quarter, instead of synchronizing the entire data set from Oracle Fusion CRM.

- Offline access: The transition between online and offline modes of operation allows the sales professional in the field to use the full functionality of the product in an offline mode, and then synchronize the sales data in the next synchronization cycle.

- Customize CRM for Microsoft Outlook: Add to the standard Microsoft Outlook view, or rearrange how the page looks, using CRM for Microsoft Outlook’s customizable objects, fields, and UI layout options. For example, Custom objects, competitors or other objects that you rely on
Supported Software for Oracle Sales Cloud for Microsoft Outlook: Explained

Before using the Oracle Sales Cloud for Microsoft Outlook application, several setup tasks must be performed. One of these tasks is to verify each user’s computer has the necessary supported software prior to installing the application.

Refer to the System Requirements for Oracle Applications Cloud web page using the following URL: http://www.oracle.com/us/products/system-requirements/overview/index.html

Oracle Fusion CRM for Microsoft Outlook Installation: Overview

This topic describes how to install Oracle Fusion CRM for Microsoft Outlook.

Note

It is recommended that System Integrators install Oracle Fusion CRM for Microsoft Outlook on laptops and PCs.

Before installing Oracle Fusion CRM for Microsoft Outlook you must ensure that you have the following prerequisites:

- Microsoft Outlook is installed on the laptop or PC.
- An existing Microsoft Outlook profile is available for use with CRM for Microsoft Outlook, or a new Microsoft Outlook profile has been created.
- You have an Employee role and a Resource role, and you have either a Sales Representative role, or a Sales Manager role; you must not have both the Sales Representative and Sales Manager roles. You also must not have a Sales Administrator role.

The installation steps are as follows:

1. Install the Oracle Fusion CRM for Microsoft Outlook security certificate: The security certificate ensures the secure exchange of data between Microsoft Outlook and Oracle Fusion CRM during synchronization, and therefore must be installed on every user’s laptop or PC. Refer to the following topic for the installation procedure: Installing the Oracle Fusion CRM for Microsoft Outlook Security Certificate: Worked Example.

2. Install the Oracle Fusion CRM for Microsoft Outlook application: To install the Oracle Fusion CRM for Microsoft Outlook application you must download the CRM for Microsoft Outlook installer file, run the InstallShield Wizard, and enter the Oracle Fusion Server connection information. Refer to the following topic for the installation procedure: Installing the Oracle Fusion CRM for Microsoft Outlook Application: Worked Example.

3. Set up the synchronization of Oracle Fusion CRM for Microsoft Outlook: Synchronization obtains the current Oracle Fusion CRM user data and the current client deployment packages. Refer to the following topic for the synchronization procedure for the first time you open CRM for Microsoft
Outlook: Setting Up Synchronization for Oracle Fusion CRM for Outlook: Worked Example.

Installing the Oracle Fusion CRM for Microsoft Outlook Security Certificate: Worked Example

This example demonstrates how to install the Oracle Fusion CRM for Microsoft Outlook security certificate on a laptop or PC, and it is one part of the installation of Oracle Fusion CRM for Microsoft Outlook. The security certificate ensures the secure exchange of data between Microsoft Outlook and Oracle Fusion CRM during synchronization, and therefore must be installed on every user's laptop or PC.

**Note**
Refer to the Oracle Fusion CRM for Microsoft Outlook Installation: Overview topic for an overview of all of the steps required to install Oracle Fusion CRM for Microsoft Outlook on a laptop or PC.

To install the Oracle Fusion CRM for Microsoft Outlook security certificate you must download the security certificate, add the Certificates Snap-In to the Microsoft Management Console, add the security certificate to the personal certificate store, and lastly, add the security certificate to the trusted root certification authorities store.

**Note**
Only one version of the Oracle Fusion CRM for Microsoft Outlook security certificate can be installed on a PC or laptop. If you require a different version of the security certificate you must uninstall the original certificate using the Microsoft Management Console.

**Download the CRM for Microsoft Outlook Security Certificate**
Download the security certificate from the Oracle Fusion CRM for Microsoft Outlook preference page in the Oracle Fusion Sales application.

1. Log in to the Oracle Fusion application, and select the Personalization menu, and then select the Set Preferences menu item.
2. Select CRM for Microsoft Outlook Installer under the Preferences pane.
3. Select the appropriate installer language, and then download the security certificate by clicking Start Download.

**Add the Certificates Snap-In to the Microsoft Management Console**
Add the Certificates snap-in to the Microsoft Management Console, so that you can install the CRM for Microsoft Outlook security certificate in the Personal and Trusted Root Certification Authorities store.

1. In the Windows Start menu, select Run, and enter mmc in the Open field to open the Microsoft Management Console.
2. In the console window, select File, and then select Add/Remove Snap-in.
3. In the Add/Remove Snap-in window, select Add.
4. In the Add standalone Snap-in window, select the Certificates snap-in, and then select Add.
5. In the Certificates Snap-in window, select My user account, and then select Finish.

6. Click Close in the Add standalone Snap-in window.

7. Click OK in the Add/Remove Snap-in window to complete the addition of the Certificate snap-in to the Microsoft Management Console.

Add the Security Certificate to the Personal Certificate Store

Install the Oracle Fusion CRM for Microsoft Outlook security certificate within the Personal store of the Certificates console.

1. Within the Certificates console, expand the Certificates - Current User folder to review all the certificate stores.

2. Right-click the Personal store folder, and select the All Tasks menu item.

3. Click the Import menu item.

4. Click Next within the Certificate Import Wizard, and then click the Browse button to navigate to the location of your downloaded Oracle Fusion CRM for Microsoft Outlook security certificate.

5. Select the security certificate file, and click Next.

6. Accept the default Personal certificate store location, and click Next.

7. Click Finish to complete the import of the security certificate to the Personal store.

Add the Security Certificate to the Trusted Root Certification Authorities Store

Install the Oracle Fusion CRM for Microsoft Outlook security certificate within the Trusted Root Certification Authorities store of the Certificates console.

1. Expand the Trusted Root Certification Authorities store folder.

2. Right-click the Certificates folder, and click the All Tasks menu item.

3. Click the Import menu item.

4. Click Next within the Certificate Import Wizard, and then click the Browse button to navigate to the same Oracle Fusion CRM for Microsoft Outlook security certificate you have just installed in the Personal store.

5. Select the security certificate file, and click Next.

6. Accept the default Trusted Root Certification Authorities certificate store location, and click Next.

7. Click Finish to complete the import of the security certificate to the Trusted Root Certification Authorities store.

Installing the Oracle Fusion CRM for Microsoft Outlook Application: Worked Example

This example demonstrates how to install the Oracle Fusion CRM for Microsoft Outlook application on a laptop or PC, following the installation of the Oracle Fusion CRM for Microsoft Outlook security certificate on the laptop or PC.
Note

Refer to the Oracle Fusion CRM for Microsoft Outlook Installation: Overview topic for an overview of all of the steps required to install Oracle Fusion CRM for Microsoft Outlook on a laptop or PC.

To install the Oracle Fusion CRM for Microsoft Outlook application you need to download the CRM for Microsoft Outlook installer file, run the InstallShield Wizard, and enter the Oracle Fusion Server connection information.

Prerequisites

The following prerequisites must be met before installing the Oracle Fusion CRM for Microsoft Outlook application:

1. Microsoft Outlook is installed on the laptop or PC.
2. An existing Microsoft Outlook profile is available for use with CRM for Microsoft Outlook, or a new Microsoft Outlook profile has been created.
3. The Oracle Fusion CRM for Microsoft Outlook security certificate has been installed in the personal certificate store and in the trusted root certification authorities store on the laptop or PC.
4. You have an Employee role and a Resource role, and have either a Sales Representative role, or a Sales Manager role; you must not have both the Sales Representative and Sales Manager roles. You also must not have a Sales Administrator role.

Download the CRM for Microsoft Outlook Installer File

Download the installer file from the Oracle Fusion CRM for Microsoft Outlook preference page in the Oracle Fusion Sales application.

1. Log in to the Oracle Fusion application, and select the Personalization menu, and then select the Set Preferences menu item.
2. Select CRM for Microsoft Outlook Installer under the Preferences pane.
3. Select the appropriate installer language, and then download the installer by clicking Start Download.

Run the InstallShield Wizard for Oracle Fusion CRM for Microsoft Outlook

1. Navigate to the installation file, and double-click the file to start the installation.
2. On the Welcome page of the InstallShield Wizard, click Next.
3. On the Customer Information page, check the defaulted User Name and Organization Name values, and amend them if necessary.
4. Also on the Customer Information page, select whether the application will be used by anyone who uses the computer, or whether the application will only be used by you.
5. Click Next in the Customer Information page.
6. On the Destination Folder page, check the default folder that will be created in the installation. If you want to use a different folder, then click Change.
7. When you have confirmed or selected a folder on the Destination Folder page, click Next.

8. On the Ready to Install the Program page, click Install.

**Enter the Oracle Fusion Server Connection Information**

1. After the InstallShield wizard has completed, open Microsoft Outlook.

2. On the Choose Profile page, choose the Microsoft Outlook profile that you want to use with Oracle Fusion CRM for Microsoft Outlook, then click OK.

3. On the message asking if you want to install the Oracle Fusion Outlook application using the profile you selected in step 2, click Yes.

4. When the CRM for Microsoft Outlook First Run Assistant pane appears, click anywhere in the Assistant pane to display the Login page.

5. In the Login page, enter your user information and the Oracle Fusion server information.

6. Click Login to complete the installation.

**Setting Up Synchronization for Oracle Fusion CRM for Outlook: Worked Example**

This example shows you how to perform an initial synchronization between Oracle Fusion CRM for Microsoft Outlook (CRM for Microsoft Outlook) and the Oracle Fusion CRM application. CRM for Microsoft Outlook synchronization obtains the current Oracle Fusion CRM user data and the current client deployment packages.

**Prerequisites**

The following prerequisites must be met before synchronizing the Oracle Fusion CRM for Microsoft Outlook application:

1. Microsoft Outlook is installed on the laptop or PC.

2. An existing Microsoft Outlook profile is available for use with CRM for Microsoft Outlook, or a new Microsoft Outlook profile has been created.

3. The CRM for Microsoft Outlook public certificate has been installed on the relevant laptop or PC.

4. Oracle Fusion CRM for Microsoft Outlook application is installed on the relevant laptop or PC.

**Access the Synchronization Control Panel**

To access the synchronization control panel, complete the following steps:

1. Open Microsoft Outlook.

2. On the Choose Profile pop up page, select the Microsoft Outlook mail profile that you set up for use with CRM for Microsoft Outlook.
3. If prompted, enter the Oracle Fusion server connection details.

4. Right click on the CRM for Microsoft Outlook icon in the system tray and then click Show Control Panel to open the Synchronization Control Panel page.

**Enter the Filter Criteria for Your Data**

Specify the type of data that will be synchronized by entering the filter criteria.

1. For this example, select the **Country** check box on the Synchronization Control Panel page to open the Edit Criterion page for the Country records, and enter the example filter criterion as shown in the following table:

<table>
<thead>
<tr>
<th>Field</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Like</td>
<td>Select a relevant country for your Oracle Fusion CRM data</td>
</tr>
</tbody>
</table>

2. Click **OK** on the Edit Criterion page.

3. On the Synchronization Control Panel page, click **Save** and then **Close**.

**Synchronize the Oracle Fusion CRM Data**

To synchronize the Fusion CRM data with the Oracle Fusion CRM for Microsoft Outlook application, complete the following steps:

1. To initiate the synchronization, right click on the CRM for Microsoft Outlook icon in the system tray and then click **Synchronize Now!**

2. Navigate back to Microsoft Outlook and explore the data that has been synchronized from Oracle Fusion CRM. The data that is synchronized is subject to your role and security settings.

**Manage Outlook Client Configuration Files**

**Managing Client Configuration Files: Explained**

Administrators can change the Oracle Fusion CRM for Microsoft Outlook application configuration as needed to meet business requirements. Following are the ways in which administrators may want to change the configuration:

- Adjust synchronization mappings to add or remove fields
- Change the CRM extensions displayed in the Outlook user interface to:
  - include new fields
  - re-arrange the controls on a CRM inspector
• expose different columns on CRM explorers
• change business logic, including making fields read-only or adding validation rules

The CRM for Microsoft Outlook extensibility process involves the following tasks:

1. Identify and access the correct client configuration file that contains the metadata to be changed.
2. Export the file from the Manage Client Configuration File task through the Oracle Fusion Setup Manager application.
3. Make changes to the file using a standard text or XML editor.
4. Access the Manage Client Configuration File task in the Setup Manager application and create a new Client Configuration File record. Upload the edited file when creating the new Client Configuration File record.
5. Select an existing or create a new Client Deployment Package.
6. Associate the new Client Configuration File record to a new instance of the Client Deployment Package.
7. Activate the new Client Deployment Package instance so that it can be tested and eventually deployed to users.

**Client Configuration File Types and Use Cases for Modifying**

There are different types of files that allow implementers to configure the application in a way that meets the requirements of each particular environment. The following table shows the Outlook client configuration file types and describes the use cases for modifying each of them.

<table>
<thead>
<tr>
<th>Client Configuration File Type</th>
<th>Description</th>
<th>Customization Use Case</th>
</tr>
</thead>
<tbody>
<tr>
<td>actions.js</td>
<td>Defines logic used by the toolbar actions.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>actions_support.js</td>
<td>Defines support functions used by the toolbar actions.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>application_script.js</td>
<td>Defines entry point for application-wide logic and implements processing for e-mail, contact, and task sharing.</td>
<td>Modify when adding action buttons on toolbars.</td>
</tr>
<tr>
<td>business_logic.js</td>
<td>Defines logic for MVG, linking child data to parent records, and handling default values when adding child data in the context of a parent object.</td>
<td>Modify to add or change default values, and to do necessary child record processing when adding new child objects.</td>
</tr>
<tr>
<td>connector_configuration.xml</td>
<td>Defines data model for synchronization include object types, links, natural keys, client filter presets, and icons for objects.</td>
<td>Modify synchronization object details including control panel configuration, object icon, object unique key, and default user filters.</td>
</tr>
<tr>
<td>data_model.js</td>
<td>Defines internal functions used to implement object and data relationships used by other scripts.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>File Name</td>
<td>Description</td>
<td>Notes</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>dialogs.xml</td>
<td>Defines layout of dialogs in the application.</td>
<td>Modify content and layout of custom Outlook dialogs such as MVG controls and other child object types that aren’t described in the forms_*.xml files including labels, and controls.</td>
</tr>
<tr>
<td>form_helpers.js</td>
<td>Defines internal functions used to support user interface events.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>forms.js</td>
<td>Defines processing used by forms and dialogs.</td>
<td>Modify validation logic for Outlook inspectors (for example, field-level read-only and required validation is implemented in the forms.js file).</td>
</tr>
<tr>
<td>forms_12.xml</td>
<td>Defines layout of CRM object forms in the application.</td>
<td>Modify content and layout of CRM object inspectors including labels, controls, section dividers, embedded lists, and their related configuration for all locales except those that have corresponding forms_12.&lt;locale&gt;.xml defined.</td>
</tr>
<tr>
<td>forms_12.&lt;language&gt;_&lt;country&gt;.xml</td>
<td>Defines layout of CRM object forms in the application for a given locale.</td>
<td>Modify content and layout of custom Outlook inspectors including labels, controls, section dividers, embedded lists, and their related configuration for specific locales that require different control mappings or layout.</td>
</tr>
<tr>
<td>fsn_helpers.js</td>
<td>Defines internal helper functions for the Fusion CRM application.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>fusion_basic_mapping.xml</td>
<td>Defines mapping between Fusion CRM objects and fields and objects and fields exposed in Outlook. Forms, views, and dialogs refer to fields defined in this file.</td>
<td>Modify list of objects and fields exposed in Outlook.</td>
</tr>
<tr>
<td>helpers.js</td>
<td>Defines internal utility functions.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>idle.js</td>
<td>Defines background processing functions to update data links in the Outlook user interface.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>idle_processing.js</td>
<td>Defines product specific rules for idle processing.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>info.xml</td>
<td>Defines product name and version.</td>
<td>n/a</td>
</tr>
<tr>
<td>InternalFilters.xml</td>
<td>Server-side filters used during change detection processing during synchronization.</td>
<td>Modify server-side filters that the application applies by default on any query operations that occur during synchronization.</td>
</tr>
<tr>
<td>lookup_view_defs.xml</td>
<td>Defines non-scriptable lookup filtering.</td>
<td>Modify lookup control configuration including related object, view, filter, and display name.</td>
</tr>
<tr>
<td>Filename</td>
<td>Description</td>
<td>Example</td>
</tr>
<tr>
<td>--------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
</tr>
<tr>
<td>MetaInfo.xml</td>
<td>Defines objects and attributes available to the Outlook client application from the Fusion CRM server application.</td>
<td>Modify list of fields exposed by the server that are used by Outlook synchronization. Modify filterable attributes for control panel.</td>
</tr>
<tr>
<td>mvg_dialogs.js</td>
<td>Defines controls for multi-value group controls.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>package_res.xml</td>
<td>Defines labels and messages used by the application in the default language, English.</td>
<td>Modify messages and user interface labels that appear in English language translation.</td>
</tr>
<tr>
<td>package_res.&lt;language&gt;_&lt;country&gt;.xml</td>
<td>Defines labels and messages used by the application in languages other than English.</td>
<td>Modify messages and user interface labels that appear in language translations other than English.</td>
</tr>
<tr>
<td>platform_configuration.xml</td>
<td>Defines rules of uninstall with respect to object removal from Outlook.</td>
<td>n/a, application framework rules</td>
</tr>
<tr>
<td>raw_item_functions.js</td>
<td>Defines internal functions used to implement Outlook item processing.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>security_manager.js</td>
<td>Defines internal functions used to implement security behavior.</td>
<td>n/a, application framework scripts</td>
</tr>
<tr>
<td>security_utils.js</td>
<td>Defines security rules implemented in Outlook.</td>
<td>Modify security rules applied on each object in the client.</td>
</tr>
<tr>
<td>views.xml</td>
<td>Defines content of list views in the application.</td>
<td>Modify to change fields, sorts, and filters on custom Outlook explorer views, and views embedded in inspectors and dialog controls.</td>
</tr>
</tbody>
</table>

**What's a client configuration file?**

In Oracle Fusion CRM for Microsoft Outlook, a client configuration file describes a part of the application configuration that resides on the user computer, and it extends the desktop application. Client configuration files can either describe a portion of the application logic implemented as Java script, or can be a declarative configuration of items, such as UI components or synchronization mappings implemented as XML. Each configuration file has a particular type. There can be more than one version of any file type at one time as long as the names differ, and only one file of any given type can be included in a deployment package.
Manage Outlook Client Deployment Packages

What's a client deployment package?

In Oracle Fusion CRM for Microsoft Outlook, a client deployment package is a collection of metadata files that describe the CRM application extensions deployed to users’ computers. Access to a given deployment package is given to CRM application users through a privilege associated with their job role. When a user connects to the CRM application server to synchronize data from a desktop application like Microsoft Outlook, the application determines if any changes to the package have occurred, and if so, downloads any changes.

Creating Deployment Packages: Explained

In Oracle Fusion CRM for Microsoft Outlook, deployment packages contain metadata files that describe the CRM application extensions deployed to users’ computers. To provide users access to a new client configuration, you can either create a new deployment package or create a new instance of an existing package, as discussed in the following sections.

Create New Deployment Package

When you create a new package, in addition to activating it, you must configure a data security policy that allows users to access the package. This secondary task is done in Oracle Fusion Authorization Policy Manager (APM) and involves the following steps:

1. In the top left section of the APM application window, use global search to search for Database Resources using search criteria equal to Outlook. This should return the result, Outlook Edition Metadata Package.
2. Select the Edit button on the Search Results pane to edit the Outlook Edition Metadata Package database resource.
3. In the Edit Database Resource tab, select the Condition tab and create a new condition on the database resource. Specify any unique name/display name, and set the SQL predicate to package_name = '<name_of_deployment_package>' (for example, package name = 'NewOutlookPackage').
4. Select the Submit button to commit the change.
5. Repeat step 2. In the search results pane, select Edit to reopen the Edit Database Resource page to edit the Outlook Edition Metadata Package database resource.
6. In the Edit Database Resource tab, select the Policy tab, and select the policy that should have access to the new package (for example, ZOE_SALES_MGR_OUTLOOK_DUTY), and then select Edit.
7. In the lower section of the page, select the Rule tab.
8. Select the lookup control next to the condition field and select the new condition created in step 3.
9. Select Submit to commit the changes.

Create New Instance of Existing Package

When you use an existing package, you create a new instance of the package with different configuration files. When using this method, you must inactivate the previous instance and activate the new instance. There is no need to configure a data policy when creating a new instance of an existing deployment package.

Manage Outlook Client Configuration Validation Files

What’s a client configuration validation file?

In Oracle Fusion CRM for Microsoft Outlook, the client configuration validation file (.xsd) describes the structure of a valid client configuration file (.xml). The application uses the client configuration validation file to check that any client configuration file imported to the server is structured correctly and complies with the requirements of the validation file. The validation process happens automatically during the import of any client configuration file, and helps catch misconfigured files.

Manage Outlook Server Configuration Files

What’s a server configuration file?

The Oracle Fusion CRM for Microsoft Outlook application uses a file to identify and map services and view objects that are used when processing synchronization requests, and to correctly query, insert, update, and delete data on the server. There is only ever one of these files used at a given time, and changes made to it are recognized by the application and loaded immediately.

Oracle Fusion CRM for Microsoft Outlook and the Fusion Server: How They Fit Together

Oracle Fusion CRM for Microsoft Outlook is a composite application that allows users to work with Oracle Fusion CRM data inside Microsoft Outlook. The application is deployed to Outlook using the add-in framework and extends the Outlook data model and UI framework in order to store and render CRM data to the user.
How Oracle Fusion CRM Data is Displayed in CRM for Microsoft Outlook

Oracle Fusion CRM data is synchronized to users’ computers and maintained in native Microsoft Outlook storage. While working in Outlook, users access CRM data that is stored locally, even when connected to the corporate network. The changes made to the CRM data are periodically synchronized with the Oracle Fusion CRM application. There are two options for storing the CRM data:

- A Microsoft Outlook mail profile configured to use a Microsoft Exchange service with the Use Cached Exchange Mode enabled to allow data to be stored in an offline storage file (.ost file format)
- A Microsoft Outlook mail profile configured to use the Internet E-Mail service with personal folder storage (.pst file format)

Because CRM data is maintained in Outlook storage, it can be displayed and accessed like any other Outlook item. For instance, CRM data types will appear in the folders for the user’s mailbox alongside other native Outlook types, and users can select the CRM folder and view the CRM records there as they would work with other Outlook information. Within a given folder, the user can select and open a single record to view the data. In this case, the user will have access to CRM data that appears within an Outlook form or inspector window.

In addition to accessing CRM data in Outlook explorer views and inspector windows where the CRM data is the primary focus, users will also be able to access CRM context when viewing standard Outlook items like appointments, e-mails, and tasks. For these Outlook types, the user will be able to specify the CRM customer, related sales item, contacts, and resources associated with the Outlook item, and will be able navigate to the related CRM item to review additional details.

Data that is stored in either cached Exchange mode in .ost file format, or in personal folders in .pst format, is accessible to the CRM for Microsoft Outlook user while disconnected. The user interacts with the CRM data that is stored locally on his computer and periodically synchronizes data between Outlook and the Fusion CRM server. Synchronization happens when the user is connected to the corporate network and can access the CRM application server. Because the user always works with the local set of CRM data, he will have access to the data from the server immediately following the synchronization process, but doesn’t directly access or update the data on the server. Changes are made to the local data set, and then the synchronization process takes care of making changes to the local or server data sets to align the two.

Overview of the Synchronization Process

After CRM for Microsoft Outlook is installed, the user must perform an initial synchronization to retrieve his accessible CRM data. Several synchronization settings are configured as part of the First Run Assistant process that influence the initial synchronization. These include the frequency of automatic synchronization, the synchronization filters to use, and which objects are enabled or disabled from synchronization. These settings can be changed by the user after the initial synchronization. Once the user completes the First Run Assistant process, the initial synchronization will begin. The duration of the synchronization process will depend on the number of records that will be synchronized, network bandwidth, load on the server, as well as processing
speed and memory available on the user's computer. A rule of thumb is to try to configure synchronization filters so that no more than five to ten thousand records are synchronized.

During the synchronization process, the application performs the following steps:

1. Connects to the Fusion CRM server CRM for Microsoft Outlook synchronization services using SOAP over HTTP and authenticates the user.
2. Performs a check to determine the configuration for which the user possesses access. Access to an Outlook configuration is established based on a privilege associated with a user's job role that allows access to an Outlook client deployment package.
3. If a user has access to a deployment package, it is downloaded, and the configuration is applied to the Outlook mailbox.
4. The final step is to synchronize data. The records that are retrieved depend on the internal filters configured on the server, data security applied to the objects that are synchronized, and the user filters.

Subsequent synchronization cycles follow a process that includes these steps:

1. CRM for Microsoft Outlook sends a request to the Fusion CRM server with a list of objects and the current user filters and requests a snapshot of IDs and timestamps for all records that are within the scope of the object list and specified filters.
2. The server sends a response with the requested information.
3. CRM for Microsoft Outlook makes a local snapshot of IDs and timestamps and compares that to the server snapshot.

The differences between the local snapshot of IDs and timestamps and the server snapshot result in a few possible actions:

- Inserts, updates, or deletes data on the Fusion server based on changes that occurred in CRM for Microsoft Outlook since the prior synchronization.
- Inserts, updates, or deletes data in CRM for Microsoft Outlook based on changes that occurred on the Fusion server since the prior synchronization.

In all cases, changes that are made to data locally in the CRM for Microsoft Outlook client are only sent to the Fusion server during the subsequent synchronization session; however, users who want to synchronize a change or set of changes immediately can start the synchronization cycle manually to avoid waiting for the next scheduled synchronization.

**About Web Services Usage During Synchronization**

The synchronization process on the Fusion server is supported by CRM for Microsoft Outlook accessing Web services. CRM for Microsoft Outlook accesses two Web services directly -- one that provides access to data during synchronization processing, and one that provides access to metadata. The synchronization process is initiated by CRM for Microsoft Outlook within
the Outlook application, and the Fusion server accepts synchronization requests, routes them to the appropriate services within the service, and returns the appropriate responses. The work that each part of the synchronization architecture performs is summarized as:

1. CRM for Microsoft Outlook synchronization engine and connector that are deployed to Microsoft Outlook perform the following:
   • Initiates a new synchronization request based on a preconfigured automatic synchronization interval or by an ad hoc user request to start a new synchronization cycle.
   • Uses the stored details about username, password, server connection information, and CRM public security certificate stored on the user’s computer to format and send requests to the CRM application server.
   • Based on the configuration deployed to a user’s computer (including object types deployed), fields defined as part of those objects, synchronization filters and the like, the application generates the appropriate SOAP message content and expects the corresponding response when using the HTTP or HTTPS transport to communicate with the CRM application server.

2. The Fusion server hosts an application that listens for CRM for Microsoft Outlook synchronization requests, and the synchronization services perform the following:
   • The OutlookRequestHandlerService Web service processes all incoming requests for data synchronization, and the OutlookMetadataService Web service handles requests to retrieve metadata.
   • Incoming SOAP messages are routed to the appropriate service. These messages include one or more requests to invoke a method on the target service.
   • Requests sent to the OutlookRequestHandlerService in particular are routed to other services to perform the action expected from the synchronization process. For instance, a request to get appointment data sent to the OutlookRequestHandlerService will be routed to the appointment Web service that will process the request and return the requested data, and the OutlookRequestHandlerService will send this back to the CRM for Microsoft Outlook client that sent the request.

    A synchronization cycle will include requests to get a server snapshot, and can then include many additional requests to query, insert, update, and delete data based on the changes detected when CRM for Microsoft Outlook compares the local and server snapshots.

    • Each of these requests is processed based on the type of request, and is either managed within the OutlookRequestHandlerService processing directly or is routed to the appropriate target service to be fulfilled.

Extensions to the Standard Outlook User Interface
In addition to standard Outlook data storage mechanisms and the synchronization engine, several extensions to the standard Outlook user
interface provide a way to access and manage CRM data inside of Outlook. Examples of extensions to the standard Outlook user interface include custom toolbar buttons, menu items, inspectors that display Fusion CRM data, controls that are embedded on standard Outlook item inspectors, the personalization options dialog box, and so forth. The CRM for Microsoft Outlook client can use these extensions to perform a variety of tasks.

The following are some examples of tasks that the user can perform:

- Create, view, and edit CRM data in Outlook.
- Mark an Outlook item to be shared with CRM Desktop and associated sales data.
- Initiate a standard Outlook action, such as sending an e-mail or scheduling a meeting in the context of a sales item.

The behavior of the extended Outlook user interface is influenced by custom CRM business logic that performs a variety of validations during data entry. The following are some examples of validation that are performed:

- Confirm that the data type is valid for a given field.
- Make sure fields that are required are populated.
- Prevent changes to fields or records that are configured to be read-only.
- Validate field values based on comparisons with other fields or static values.
- Apply conditional validation so that a field may be required or read-only based on other criteria.

**Physical Components that CRM for Microsoft Outlook Architecture Uses**

Following are the major physical components that CRM for Microsoft Outlook uses:

1. **CRM Database**
   
   This is the database accessed by the CRM application that stores data about customers, contacts, business opportunities, and so on.

2. **CRM Application Server**
   
   This is the server that hosts the CRM for Microsoft Outlook application and the related Outlook Web services, and therefore is the main entry point for synchronization requests coming from the CRM for Microsoft Outlook add-in running on users’ computers.

3. **Laptop or Desktop**
   
   This is the computer where the CRM for Microsoft Outlook add-in is installed, and where users are working with CRM data in Outlook. The Outlook add-in will install binary files that support synchronization of CRM data and integration with Outlook, including support to extend the Outlook data model and user interface, and resource files containing images and strings to initialize the application. The CRM for Microsoft Outlook add-in will connect to the CRM application server and download
the appropriate configuration and CRM data for the user which are also stored on this computer.

4. Corporate Messaging Infrastructure

The corporate messaging infrastructure encompasses all of the server computers and other network topology that support the transmission of e-mail messages, and other personal information management capabilities such as the corporate calendar, contact and task lists.

CRM for Microsoft Outlook Functional Components

Following are the CRM for Microsoft Outlook functional components:

1. CRM Extensions in Outlook

Extensions integrate with Outlook data storage and deliver additional business logic and extensions to the Outlook user interface to allow users to access and modify CRM data. CRM data is viewed with extensions to the Outlook user interface. Changes to CRM data are controlled by business logic and custom controls and then finally stored in Outlook data storage (for example, in a user’s mailbox storage file). The user works with a version of the CRM application, as defined in the configuration deployed to the user’s computer. Changes to CRM data since the last synchronization cycle are calculated by the synchronization engine during data synchronization with the CRM application server.

2. Synchronization Engine

The synchronization engine handles requests to initiate a synchronization cycle and is responsible for structuring the requests that are sent to the server. For the initial and incremental synchronization cycles, the synchronization engine manages requests to count records available to the user; sends a request to generate a server snapshot; initiates the process to generate a local snapshot; compares the results; and calculates the necessary requests to be sent to the CRM application server to complete the synchronization of local and server data sets. The synchronization engine works in tandem with the connector to correctly format and transmit messages with the CRM application server.

3. CRM Connector

This part of the CRM for Microsoft Outlook add-in is responsible for knowing how to connect and communicate with the CRM application server. The connector uses details such as the username, password, connect string, public security certificate, and client metadata to interpret requests from the synchronization engine to correctly format and send requests to the CRM application server. All details of the requests to send to the server are orchestrated by the synchronization engine, but the transmission of the requests and retrieval of the responses is done by the connector. The connector uses the details in the connect string to know where to send requests to the CRM application Web services.

4. CRM Application Web Service

CRM Web Service provides functionality to handle the user session, and to add, delete, modify, count, and list data objects that are required by the Web service connector.
FAQs for Administer CRM for Microsoft Outlook

How can I stop Appointments, Contacts, and Tasks from being shared automatically with Oracle Fusion CRM for Microsoft Outlook?

Right-click on the Oracle Fusion CRM for Microsoft Outlook system tray icon and then select Options. Within the Options window, click Advanced, and then deselect Always share with Oracle Fusion new: Appointments, Contacts, Tasks.
Oracle Sales Cloud Mobile: Overview

The Oracle Sales Cloud Mobile application enables sales persons to track and update sales information on their smartphone or tablet device, enabling them to keep up-to-date with sales activities in their enterprise while on the move.

Summary of Features

The key features of Oracle Sales Cloud Mobile include the following:

- **Application Home Page**: The application home page provides salespeople with access to critical information when they are in the field. All functional areas of the application are arranged in a grid on the home page.

- **Sales Account Management**: Salespeople can access reference information, as well as current events about the customer while on the road.

- **Opportunity Management**: From the mobile opportunity management page, the salesperson can access current and critical information about his opportunities and can share opportunity updates with the sales team.

- **Lead Management**: With access to open leads while on the road, the salesperson can act upon the leads and reduce the sales cycle time.

- **Calendar and Tasks**: These features enable the salesperson to view events occurring in the next two weeks, and a list of all open tasks, helping the salesperson to manage appointments and tasks on the road.

- **Contacts**: Contacts can be phoned or e-mailed from the Actions menu. The application displays a list of the salesperson’s key contacts by default, and all other contacts can be found using the search feature. Contacts who do not want to be phoned or e-mailed will have the Email Contact and Call Contact features disabled for their respective contact records.

- **Sales Analytics**: Salespeople can access business intelligence reports from the home page. Analytics also are embedded contextually for each account that a salesperson is viewing on the mobile application. The contextual reports include data on sales account revenue trends, sales account win/loss trends, and sales account win/loss reasons.

- **Alerts**: The application automatically sends alerts to the salesperson when new leads are assigned or opportunities of interest become available.
Oracle Sales Cloud Mobile Extensibility: Explained

Application Composer lets implementors customize the Oracle Sales Cloud Mobile Sales iPhone and BlackBerry applications. Using Application Composer, implementors can manage which objects and fields are visible on the Oracle Sales Cloud Mobile application without having to do specific customizations for any particular device.

Implementors can manage the following for the Oracle Sales Cloud Mobile application:

- Enable standard Oracle Sales Cloud Sales, Customer Center, Marketing, and Common objects that are not enabled by default for smartphones.
- Enable custom Sales, Customer Center, Marketing, and Common objects for smartphones.
- Change the fields (including custom fields) visible on Oracle Sales Cloud Mobile for mobile-enabled Sales, Customer Center, Marketing, and Common objects (standard or custom objects).

Installing the Oracle Sales Cloud Mobile iPhone Application: Worked Example

This example shows you how to install the Oracle Sales Cloud Mobile application on an iPhone.

1. Using your iPhone, sign in to iTunes and access the App Store.
2. Search for Oracle Sales Cloud Mobile and then tap Install.
3. Enter your user name and password.
4. Open the Oracle Sales Cloud Mobile application, and enter your user name and password.
5. Tap Advanced and enter the host details your administrator has provided.
6. Sign in to the Oracle Sales Cloud Mobile application.

Installing the Oracle Sales Cloud Mobile BlackBerry Application: Worked Example

This example shows you how to install the Oracle Sales Cloud Mobile application on a BlackBerry device.

1. Check that the BlackBerry’s Wi-Fi is switched on.
2. Using the BlackBerry’s browser, enter the host URL that your administrator has provided.
3. Enter the authentication credentials to sign in.
4. Click **Start Download** to start the download and installation.

**Installing the Oracle Sales Cloud Mobile Android Application:**

**Worked Example**

This example shows you how to install the Oracle Sales Cloud Mobile application on an Android device.

1. Using your Android device, sign in to Google Play, and browse the Apps.
2. Search for **Oracle Sales Cloud Mobile** and then tap **Install**.
3. Open the Oracle Sales Cloud Mobile application, and enter your user name and password.
4. Tap **Advanced** and enter the host details your administrator has provided.
5. Sign in to the Oracle Sales Cloud Mobile application.

**Finding Your Company’s Host URL for Oracle Sales Cloud Mobile:**

**Worked Example**

When signing into Oracle Sales Cloud Mobile, users need to enter a **Host URL** that specifies the Oracle Sales Cloud server location. This example shows how to determine the host URL value for iPhone, BlackBerry, and Android devices.

**Determining the Host URL for iPhone and Android Devices**

These are the steps you need to carry out to determine the Host URL for iPhone and Android devices.

1. Sign in to Oracle Sales Cloud, and select **Navigator** and then **Application Composer**.
2. Copy the complete URL that’s in your browser's address bar. For example, https://fap0655-crm.oracleads.com/crmCommon/faces/ExtnConfiguratorHome?_afrLoop=113498989797000&webApp=HomePage&fndHomePageViewId=%2FAtkHomePageWelcome&fnd=%3B%3B%3Bfalse%3B256&_afrWindowMode=0&_adf.ctrl-state=m6wpw0vid_4
3. Now copy the host name portion of the URL only, which is the part between https:// and the next forward slash (/). This is your organization’s host URL. In our example, the host URL would be: fap0655-crm.oracleads.com.
4. Inform your users of the Host URL value, so that they can use it when they’re signing into the application.

**Determining the Host URL for BlackBerry Devices**

These are the steps you need to carry out to determine the Host URL for BlackBerry devices.

1. Start with this URL: https://host/sales/faces/MobileInstallerMain.
2. Find out the Host URL. Sign in to Oracle Sales Cloud Service, and select Navigator and then Application Composer.

3. Copy the complete URL that’s in your browser’s address bar. For example, https://fap0655-crm.oracleads.com/crmCommon/faces/ExtnConfiguratorHome?_afrLoop=113498989797000&webApp=HomePage&fndHomePageViewId=%2FAtkHomePageWelcome&fnd=%3B%3B%3B%3Bfalse%3B256&_afrWindowMode=0&_adf.ctrl-state=m6wpw0vid_4

4. Now copy the host name portion of the URL only, which is the part between https:// and the next forward slash (/). This is your organization’s host URL. In our example, the host URL would be: fap0655-crm.oracleads.com.

5. Using the URL mentioned in step 1, replace host with the Host URL value. Therefore, in our example, the URL for a BlackBerry installation would be: https://fap0655-crm.oracleads.com/sales/faces/MobileInstallerMain.

6. Inform your users of the Host URL value, so that they can use it when they’re signing into the application.

FAQs for Administer Mobile Sales

What are the supported platforms for Oracle Sales Cloud Mobile?

Refer to the “System Requirements for Oracle Applications Cloud page”, on Oracle.com: http://www.oracle.com/us/products/system-requirements/overview/index.html

How do I install the Oracle Sales Cloud Mobile iPhone application?

Using your iPhone, log onto iTunes and access the App Store. Search for the Oracle Sales Cloud Mobile application and download. Enter your username, password, and the Oracle Sales Cloud server details to sign into the client. Your company’s System Administrator can provide you with the Oracle Sales Cloud server details.

How can I navigate within the Oracle Sales Cloud Mobile client?

On both the Apple iPhone and Blackberry mobile devices, tapping any icon on the home page shows a list of items. For example, tapping Opportunities retrieves a list of your open opportunities. You can view details by tapping any item in the list view. Additionally, you can scroll upward in list view to obtain a search box to search for items on the client application. For quick and easy access to contextual actions, you can tap and hold any list item to reveal available contextual actions.
On the Apple iPhone, you can tap the Title bar, which returns you to the application springboard. Then select Action to reveal a contextual action sheet. Selecting Action again closes the action sheet.

On the Blackberry, both Short and Full menus are enabled. You can also use the Back button to return to the previous screen.

**How can I synchronize the Apple iPhone calendar and contacts with Oracle Sales Cloud?**

To synchronize your Apple iPhone calendar and contacts with Oracle Sales Cloud, you must configure the calendar (calDAV) and contacts (cardDAV) settings on the iPhone.

**How do I install the Oracle Sales Cloud Mobile BlackBerry application?**

Ensure the BlackBerry’s Wi-Fi is on, then using the BlackBerry’s browser, enter the following URL: http(s)://host:port/sales/faces/MobileInstallerMain (the word 'host' should be replaced with the location of where the Oracle Sales Cloud application is deployed). Enter the authentication credentials to sign in, and click Start Download to start the download and installation.

**Why can't I convert a lead to an opportunity?**

You can only convert a lead to an opportunity when the prospect or customer associated to the lead is a sales account.

**How can I update the Oracle Sales Cloud Mobile application on my BlackBerry device?**

Using the BlackBerry's browser, enter the following URL: http(s)://host:port/sales/faces/MobileInstallerMain (the word "host" should be replaced with the location of the latest version of Oracle Sales Cloud). Enter the authentication credentials to sign in, and click Start Download to start the download and installation of the latest version of Oracle Sales Cloud Mobile. Note that your existing Oracle Sales Cloud Mobile installation will be overwritten.

Note that because the Oracle Sales Cloud Mobile application is not available on BlackBerry App World the application cannot be updated using BlackBerry App World.

**How can I disable the off-line mode for Oracle Sales Cloud Mobile?**

Navigate to the Manage Administrator Profile Values task in the Setup and Maintenance work area, and search for the
**ZMS_ALLOW_OFFLINE_DATA_STORE** profile option. Set the profile option value to **No** to disable the off-line mode.

**How can I encrypt data that is stored locally on a mobile device for off-line use?**

Navigate to the Manage Administrator Profile Values task in the Setup and Maintenance work area, and search for the **ZMS_ENFORCE_OFFLINE_DATA_ENCRYPTION** profile option. Set the profile option value to **Yes** to encrypt data that’s stored locally on mobile devices for off-line use.

**Why can't I create, edit, or delete any data in the Oracle Sales Cloud Mobile application?**

Because the application is in the off-line mode, due to a lack of network coverage.

**Why can't I view updates to my data?**

When the application has switched to the off-line mode, due to the absence of a network connection, you cannot view any updates that have been made to the sales data since the application changed to the off-line mode. You will be able to view the data updates when you access the record again after regaining access to a network connection.

**What data are available in the Oracle Sales Cloud Mobile off-line mode?**

Oracle Sales Cloud Mobile saves the data that has been recently viewed - for example, a list of opportunities, specific opportunity details, and a list of contacts - so that when you are using the offline mode, you can view the saved data. Additionally, you can save specific records and their related objects for offline use by tapping **action** when viewing the record, and saving the customer detail.

Note that when the application can connect to a network - and therefore changes to the online mode - your data are not automatically synchronized with the data updates that other people have made when you were in the offline. You will need to access the records again in the online mode, so that you can view the updated data.

**Why can't I access the Around Me feature?**

The Around Me feature is not available for BlackBerry devices, and is available only for devices that use the iOS and Android operating systems.
Why can't I view the Around Me results on a map?

Android devices display the Around Me results in a list view, and not on a map.

How can I remove contacts, assignees, and resources from appointments, tasks, and interactions?

Navigate to the appointment, task, or interaction, and tap Edit to turn on the edit mode. Tap and hold on the contact, assignee, or resource you want to remove for two or three seconds. Then tap Remove, and tap Done to save your update.

Note that the owner of the appointment, task, or interaction can't be removed.

Can I delete the custom fields I have created for the Around Me feature?

Yes; if you have created custom fields for the Around Me feature for earlier releases, you no longer need to maintain the fields with geocodes, as the application no longer makes use of them. You can remove the custom fields at your convenience.

Can I use Oracle Social Network within Oracle Sales Cloud Mobile?

Yes, when using an Apple device, you can invoke the Oracle Social Network application for the customer, opportunity, or contact you are viewing. Navigate to the detail view of the customer, opportunity, or contact, and tap the Actions menu, then launch the Oracle Social Network application.

How can I create a search criteria that can be saved for use in the Oracle Sales Cloud Mobile application?

You can create a search criteria for Apple and Android devices that can be saved and used in the application. The saved search can be created either by using Page Composer, or by using the Oracle Sales Cloud web interface. Ensure that the auto-execute option is selected, so that the search can be executed by tapping on the search name in the Oracle Sales Cloud Mobile application.

How can I view a saved search criteria?

Tap the magnifying glass icon in the list view to view a list of available saved searches, and execute the search by tapping on an individual saved search. Also,
if you tap the search box, you will see additional fields where you can make changes to the search criteria, and then execute the search.
Adding Oracle Social Network in Oracle Sales Cloud: Overview

Oracle Social Network allows you to create Social Objects and Conversations that are associated with an Oracle Sales Cloud object record. Social Objects are records within a business application or business process that are mapped into Oracle Social Network. You can expose a record from an Oracle Sales Cloud application in Oracle Social Network and make it visible to selected people. Within Oracle Social Network, you can have a Conversation on the same page where the record appears. Conversations are online discussions that can include messages, replies, documents, links, and gadgets. They provide the central point of collaboration in Oracle Social Network, bringing people together to discuss, evolve, and preserve all of the exchanges leading to decisions, plans, and partnerships. You can associate Conversations (called Related Conversations) to a Social Object, making them easy to find.

These Conversations are included in a special view of the Oracle Social Network that you can access directly from an object record. You can use Conversations to track and discuss information about an object record with others who are included in the Conversation’s group. This topic describes which objects in Oracle Sales Cloud your administrator can enable for Oracle Social Network, and how you can include Conversations on object records after the objects have been enabled.

Your administrator enables objects for Oracle Social Network, and then you can choose whether to share an object record to Oracle Social Network (for example, you might expose a specific sales lead or opportunity to Oracle Social Network, then add one or more Conversations to it). Sharing a record to Oracle Social Network allows, for example, your sales team to discuss and share details about that particular Oracle Sales Cloud object record.

Your administrator can enable the following objects for Oracle Social Network:

- Organization
- Person
- Group
- Competitor
- Lead
FAQs for Manage Social Networking

How can I share opportunity information with sales colleagues using Oracle Social Network Cloud Services?

Using Oracle Social Network conversations, you can tie collaborative discussions to a particular Oracle Cloud Application Services opportunity, even if some
or all of the participants in the conversation don't have access to Oracle Cloud Application Services. Oracle Social Network makes it easy to collaborate with colleagues who can share their knowledge or information about a particular opportunity so you can be prepared with the most up to date data.

For example, suppose you are a sales representative who needs more information about the way regulations work in a particular territory, so you want to seek additional information from colleagues with knowledge of that territory. To do this:

1. Click the Social link to open Oracle Social Network.
2. Click the Share button if the opportunity hasn’t already been shared, or the Join button to join the opportunity. You can also add members to the wall, and post messages to the wall associated with the opportunity.
3. Click the New Related Conversation button to create a new conversation about the opportunity.
4. Add your knowledgeable colleagues to the conversation.
5. Post your questions to the conversation, and add follow-up flags to let your colleagues know you’re waiting for their responses.
6. When your colleagues respond (perhaps with Word documents or other useful files), you can annotate these files with additional questions and comments if necessary and then set another follow-up flag to alert your colleagues that you’ve updated them.
7. Continue the collaboration in the conversation as long as you need further details. If you need additional information, you can add more colleagues.

If you see the Social link in an opportunity, that’s your cue that social networking features are available for that particular object.

Note
Oracle Social Network is currently available in Cloud implementations only.

How can I use social collaboration features to drive sales activity on my team?

Using Oracle Social Network conversations, you can tie collaborative discussions to a particular Oracle Cloud Application Services object, even if some or all of the participants in the Conversation don’t have access to Oracle Cloud Application Services. Oracle Social Network conversations let you make sure that your team is sharing information with each other, and bringing in other colleagues with relevant experience to add their knowledge to the discussion.

For example, suppose you are a sales manager who wants to encourage collaboration among both your team and any other resources at your company who can provide information. To do this:

1. Review your team’s conversations, and identify any issues that they might need help with.
2. Add colleagues, both in your group and in other areas, who have knowledge about these issues.
3. If necessary, add documents to the conversation to update your newly added colleagues about the issue.

As another example, you notice that one of your team's sales accounts hasn't had any activity for two months, and you know that there's a new product that might be a good fit for the customer. To facilitate collaboration:

1. Start a private conversation with a member of the product team to discuss the product and its suitability for meeting the customers' needs.

2. Schedule a meeting between you, the product team member, and the sales representative.

3. You and the other participants can post files, such as a slide deck, to the conversation for review prior to the meeting.

4. Participants can annotate the files with additional or updated information both before and after the meeting.

Note

Oracle Social Network is currently available in Cloud implementations only.
**adjusted forecast**

Total forecast for all revenue items that meet forecast criteria plus a salesperson’s adjustment amount, which can be a positive or negative number.

**adjusted territory quota**

The quota amount assigned to the user plus the adjustment amount entered.

**adjustment threshold**

Largest percentage of a quota that can be added as an adjustment.

**candidate object**

A candidate object is a business object, such as a resource or a territory, that is associated with one or more work objects for eventual assignment. Creating a candidate object involves entering its application information and selecting its attributes to use in rules or mappings.

**classification object**

A special type of candidate object that does not represent a business object that gets assigned to a work object. It is used only with classification rules and is used primarily to rank or qualify leads.

**competitor**

An organization that competes with the deploying organization in sales situations.

**confidence**

Confidence is the ratio that shows the occurrences of the influencer over records containing the recommended product. Confidence value ranges between 0 and 1, where 0 indicates no occurrence at all and 1 indicates 100% occurrence. Confidence closer to 1 indicates higher likelihood that the customer will buy the recommended product.

**deal size**

Total monetary amount the customer is expected to spend.

**dimension**

A data category used to define territory boundaries, such as geography. Dimensions contain related dimension members usually organized in hierarchies. For example, a geography dimension often includes members, such as countries, and cities that belong to countries. Defined dimensions determine how to assign objects, such as sales accounts, leads, and opportunities.
**dimension member**
Individual components of a dimension.

**distinct values**
Count of distinct attribute values.

**eligibility rule**
Rules that define what can or cannot be sold to what customers based on a set of eligibility or business criteria, such as due to company policy or customer eligibility constraints. Eligibility rules are evaluated before any recommendations can be made.

**forecast due date**
The date after which the forecast changes from current status to past status and no changes can be made to the forecast.

**influencer**
A product or attribute that has influenced the recommended product in past transactions. For example, if customers who bought product A also bought product B, then product A is an influencer.

**interaction**
A record of contact or communication between internal and external contacts.

**internal expert**
Experts who have prior experience with a certain competitor. Salespeople can leverage knowledge of internal experts while attempting to achieve a sale.

**IQR**
Abbreviation for interquartile range. A measure of statistical dispersion being equal to the difference between the upper and lower quartiles. Upper and lower quartiles are the data ranges above 75 percent and below 25 percent of the total data population. The interquartile range is the middle 50 percent of the data in a segment.

**lead**
A new prospect or existing customer who has interest or the potential for interest in a product or service being sold. The interest is represented in the application by a lead.

**lead rank**
A configurable set of values such as hot, warm, or cool used to prioritize leads for lead qualification and sales engagement.
lift
Indicates the improvement in predictive ability when using association model prediction over randomness. The baseline for lift is 1. If the lift is greater than 1, it indicates that the predictive ability while using prediction is better than randomness.

line of business
A particular kind of commercial enterprise. For example, a broad grouping of sellable products such as hardware or training.

market potential
Estimated revenue for sales leads and recommendations within a territory.

named account
A sales account that is considered of special importance to Sales and given the designation "named" in Customer Center.

nonrevenue quota
A type of quota typically assigned to a sales resource with overlay sales roles, such as sales consultants or telemarketing representatives, to measure their performance.

null percentage
Refers to the percentage of attribute values that is null. Higher null percentage means the data is not well-populated.

overlay territory
A territory, usually owned by an internal employee, whose team supports the sales activities within the territory boundaries. Overlay territories often overlap with one or more prime or other overlay territories.

partner
Independent company that works with multiple vendors, selling and servicing on behalf of a vendor.

partner
An independent corporation that works with one or many channel organizations. A partner engages with a channel organization in many ways, such as: sales, service, influence, support, and so on.

partner program
Channel organizations define partner programs to segment partners and provide benefits based on partner competencies and expected revenue from partners. Programs have an eligibility criteria and associated benefits.
prediction rules
A user-defined business logic that identifies target customer segments for target products based on a set of criteria to predict the likelihood of target customers to buy a product, the average revenue, and the average sales cycle salespeople could expect.

predictive model
Functions built from an observable data sample and used to estimate an outcome that is unknown at the point of decision. Predictive models analyze past sales data to predict future sales potential. For example, models predict likelihood to buy, potential revenue, and estimated length of the sales cycle.

prime territory
A territory that is usually owned by an internal employee who is directly responsible for sales within the territory boundaries. Prime territories aim to assign sales representatives to each region where potential customers are located.

prospective partner
A prospective partner is an organization that has the potential to enter into a partnership with the deploying company or has expressed interest to become a partner by submitting an application for registration.

qualified lead
A qualified lead is one where the lead qualification status has been updated to qualified. Generally, a lead is considered qualified and ready for conversion to a sale when the need, purchase interest, and budget are confirmed and a sales account and primary product are associated with the lead.

quota
A revenue target, often tied to expected performance.

reference customer
A customer who has been enrolled in a reference program managed by marketing.

resource
People designated as able to be assigned to work objects, for example, service agents, sales managers, or partner contacts. A sales manager and partner contact can be assigned to work on a lead or opportunity. A service agent can be assigned to a service request.

resource quota
The revenue target associated with a territory resource. Resource quota can be either revenue resource quota or nonrevenue resource quota.
**rule folder**

A folder that enables logical grouping of rules and holds rules of a single type: eligibility or prediction.

**rule support**

Ratio of occurrence of the influencer and recommended product together over total number of records. Support value ranges between 0 and 1, where 0 indicates no occurrence at all and 1 indicates 100% occurrence. Rule support closer to 1 is better than that closer to 0.

**sales account**

Parties with the usage Sales Account and a sales account profile containing sales information specific to the party. When a party has one sell to address, it ceases to be a sales prospect and becomes a new sales account. When the party purchases something, it changes from a new to an existing sales account.

**sales campaign**

A sales campaign enables a salesperson to target customer contacts by e-mail in a personalized campaign, using marketing generated collateral.

**sales goal**

A business or sales objective represented as a measurable goal. A sales goal is defined by how it’s measured (amount or quantity), and whether or not the goal has a focus such as on specific product groups.

**sales quota**

Territory and resource quota together compose sales quota.

**sales quota plan**

Plan that contains all quota activities for the fiscal year, created by the administrator. Actual sales and pipeline are tracked against only one quota plan for the year.

**source territory**

A territory with one or more dimensions inherited by at least one recipient territory.

**standard deviation**

A measure of deviation of a set of data from its mean. If the data is spread out over a large range of values, the deviation is higher.

**SWOT**

Abbreviation for strengths, weaknesses, opportunities, and threats. An analysis of the strengths, weaknesses, opportunities, and threats specific to an organization as compared to the deploying organization.
**territory**

The jurisdiction of responsibility of a salesperson or sales manager over a set of sales accounts. Territories serve as a basis for forecasting, quota, compensation, and analysis of sales performance.

**territory coverage**

A territory coverage is a set of boundaries that define what is included or excluded in the territory and what can be sold. Selected customers or partners can be selected to be included or excluded from the territory being defined. For example, sell all products in North America.

**territory freeze date**

The date after which forecasting stops accepting territory hierarchy changes for the scheduled forecast and forecasting activities can begin.

**territory owner**

Resource assigned to manage a territory and is typically accountable for the work objects, such as opportunities, that are within the boundaries of the territory.

**territory proposal**

A sandbox container used to model territory changes. All valid territories within a proposal become active on the proposal activation date.

**territory quota**

The revenue target associated with the expected performance of a territory.

**unadjusted sales forecast**

The unadjusted forecast is the total forecast for all revenue items that meet forecast criteria and that have close dates falling within the forecast period. The unadjusted number excludes any adjustments made to individual forecast items.

**work object**

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