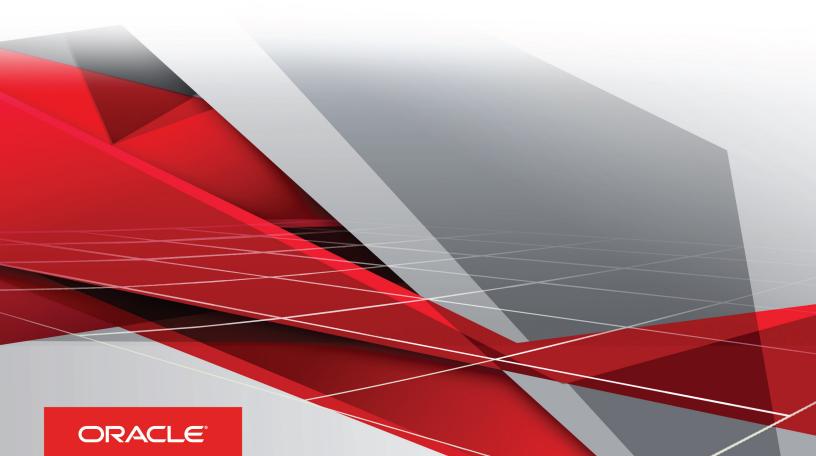# Oracle

Sales Cloud
Getting Started with Your Implementation

Release 9

ORACLE

Oracle® Sales Cloud Getting Started with Your Implementation

Part Number E57784-02

Contents

ORACLE®

ORACLE®

ORACLE®

Preface

This Preface introduces information sources available to help you use Oracle Applications.

Oracle Applications Help

Use the help icon to access Oracle Applications Help in the application.

> ✏️ **Note**
> If you don't see any help icons on your page, click the Show Help button in the global area. Not all pages have help icons.

You can also access Oracle Applications Help at https://fusionhelp.oracle.com/.

Oracle Applications Guides

To find other guides for Oracle Applications, go to:

- Oracle Applications Help, and select **Documentation Library** from the **Navigator** menu.
- Oracle Help Center at http://docs.oracle.com/

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.

Oracle Enterprise Repository for Oracle Fusion Applications

Oracle Enterprise Repository for Oracle Fusion Applications (http://fusionappsoer.oracle.com) provides details on assets (such as services, integration tables, and composites) to help you manage the lifecycle of your software.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! - Send e-mail to: oracle_fusion_applications_help_ww_grp@oracle.com. - Click your user name in the global area of Oracle Applications Help, and select **Send Feedback to Oracle**.

ORACLE®

1 About This Guide

Prerequisites

This guide assumes that you have subscribed to Oracle Sales Cloud and have received the e-mail with your environment and initial sign-on information.

Purpose and Scope

This guide is intended for administrators tasked with learning how to set up sales automation capabilities in Oracle Sales Cloud. This document uses a case study to provide you with the concepts and procedures you'll need to implement sales automation in a test environment. This guide does not provide detailed explanations of all available features and settings.

What You Will Be Able to Do After Completing the Setups in This Guide

After completing the setups in this guide, you will be able to:

- Manage account and contact information

    - Track your team's interactions with account contacts

    - Schedule meetings, calls, and demos for the whole team

- Share and collaborate on sales documents

    - Share documents, images, and other rich media between people and groups

    - Make it possible for everyone to annotate and discuss each document

- Manage opportunities

    - Automatically assign the right sales people to each opportunity

    - Have your sales team manage the opportunity life cycle using a standard sales process

    - Leverage the experience of your entire organization to help teams sell through social interactions

- Manage the sales team

    - Assign tasks and deadlines to ensure the work gets done

    - Provide management with reports on your team's activities

ORACLE®
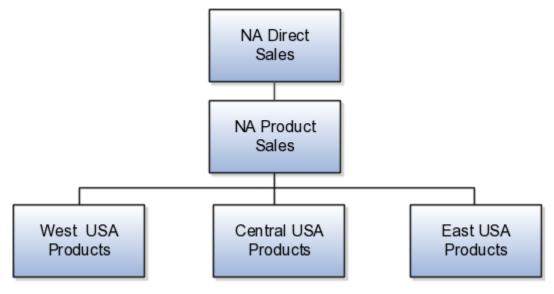
- Forecast your revenue

  - Your salespeople submit their forecasts based on criteria you choose

  - Managers can adjust the forecasts, if necessary

- Work on multiple devices

  - Manage all your customer-facing information, forecasts, and other activities on mobile devices and in Microsoft Outlook

    Setting up Outlook and mobile devices is optional. If you want, you can leave this setup for later.

Case Study

This guide employs a case study to help define the scope of the implementation considerations and tasks. The case study is based on a fictitious company named Vision Corporation, a global high-tech company which sells multiple server product lines geared towards the business customer. The company is introducing a product line of green servers that are energy efficient, eco-friendly, and will further help it to remain competitive in the server market.

Here is a portion of Vision Corp.'s organization chart which the company has decided to use for the pilot implementation:

The scope of the use case assumes that Vision Corp.:

- Sells to businesses and must know everything about the key contacts at the customers it sells to.

- Does all of its business in North America and in a single currency, the U.S. dollar, and does not take advantage of the multi-currency features available in Oracle Sales Cloud.

- Is setting up sales automation initially without any integrations to other Oracle Cloud offerings.

- Organizes its sales territories by state and product.

ORACLE®

2 Signing in and Getting Oriented

Signing In for the First Time
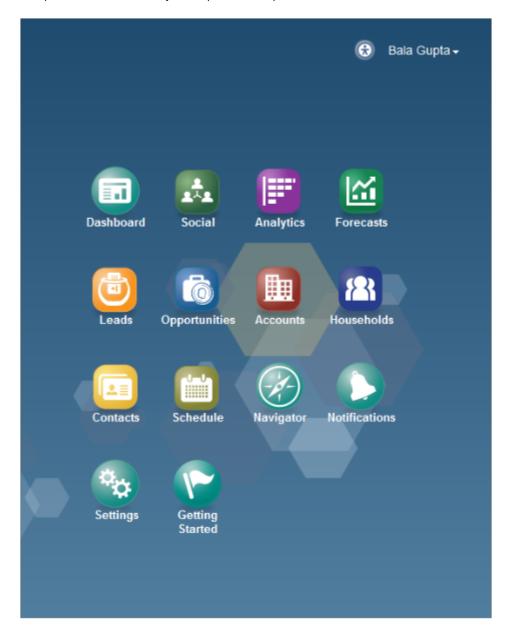
When your test environment is ready, Oracle sends an e-mail to the person designated as the administrator when you signed up with Oracle Sales Cloud. This e-mail includes the link to your service, a temporary password, and instructions on how to access the Oracle Sales Cloud Welcome Note (Doc ID 1491026.1) on My Oracle Support (support.oracle.com). You must read this note and follow the instructions before signing in.

ORACLE®

Available User Interfaces
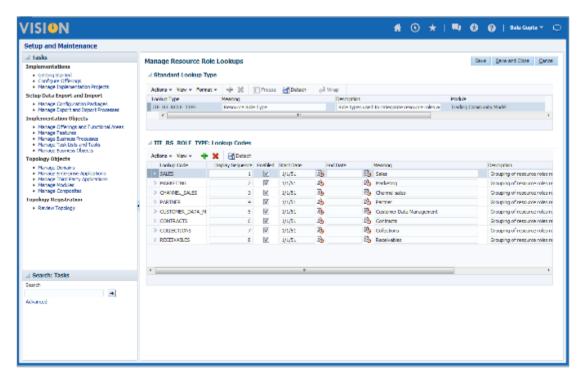
Sales team members can work in multiple user interfaces (UIs) that are optimized for different uses:

- The simplified UI provides the efficiency and speed sales personnel need to do their work.

- The desktop UI provides additional page real estate required for setup tasks and for advanced sales manager and administrator functions, including approvals and notifications.

- The mobile UI is optimized for managing sales information on multiple mobile devices. You can use it to manage appointments, leads, accounts, contacts, and opportunities. It includes:

  ○ Location integration, so you can see where customers are located.

  ○ Integration with calendar, e-mail, and camera. You can automatically log e-mails and other interactions with customers, and add pictures of contacts to their profiles.

○ A disconnected mode that makes it possible for your sales organization to continue working even when disconnected from the network.

Getting Oriented in Oracle Sales Cloud

When setting up Oracle Sales Cloud, you will be primarily using the desktop and simplified user interfaces (UIs):

- You will perform setup tasks in the desktop UI.

- You will use the simplified UI primarily for testing.
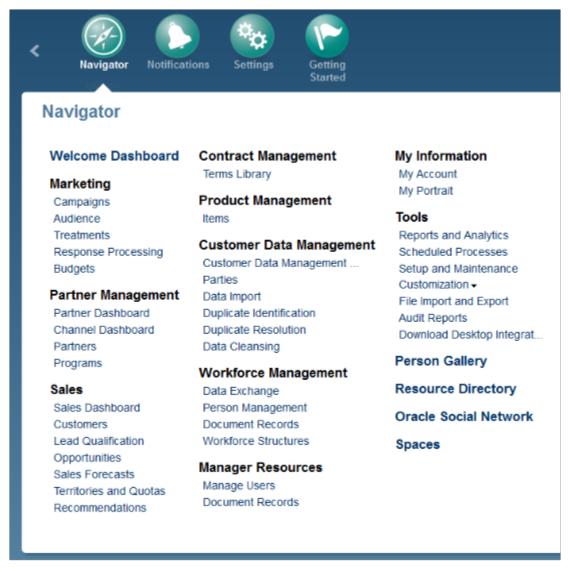
Navigating to Setup Tasks

When you sign in, you are automatically directed to the simplified UI.

To navigate to setup tasks and different application work areas, you click on the Navigator icon and make a selection from the menu. The menu selections are identical in both the simplified and desktop UIs.

The Navigator shows all of the application work areas that are available to you based on the permissions assigned to you, rather than on the features you have purchased. Because a setup user has a broad range of permissions assigned, not all of the selections are applicable to your setup.

For setup, you will be using only a small number of the available work areas accessible from the Navigator menu. The most important of these include:

- **Manager Resources**

    - **Manage Users**

        Use this work area for creating and managing individual users. If you want to create users in bulk by importing them, you must use the file import tasks available from the Setup and Maintenance work area.

- **Tools**

    - **Setup and Maintenance**

        Use this work area to launch implementation tasks.

ORACLE®

◦ **Scheduled Processes**

Use this work area for scheduling and monitoring background processes.

> ✎ **Note**
> The initial user provided by Oracle is not provisioned with the Employee abstract role and so does not have the permission to run or monitor scheduled processes, including geography import. You should sign in as one of he setup users described in this guide to perform these tasks.

◦ **Application Composer**

Use Application Composer work area to customize and extend your application.

• **Sales**

You will be using the different work areas under this heading to set up and test functional aspects of your sales application.
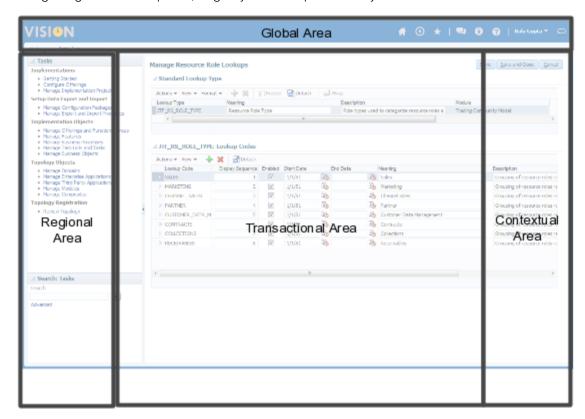
Desktop UI Organization

The desktop UI is divided into different areas. You can have up to four areas on a single page, but most pages have just two or three:

• The top of the page, called the Global area, remains no matter where in the application you are.

• The center of the page, called the Transactional area, is the work area.

• The left side of the page, the Regional, lists tasks available in the work area and provides some useful widgets, including a search that you can use to quickly get to a task.

• On some pages, there is an additional area on the right, called the Contextual Area. It provides more information on the particular record or task you are working on.

ORACLE

Both the left and right regions are collapsible, to give you more space to do your work.

Useful Toolbar Items

Here are the most useful toolbar items in the Global area:

Icon	Description
🏠	Return to the Welcome page.
◉	Navigate to different work areas.
★	Mark as favorite (on desktop UI only).
❓	Toggle help icons on or off.
Bala Gupta ▼	Use the menu under the user name, to sign out, set preferences, get help, and access personalization and customization features.
⬭	Idle indicator. Wait for the application to complete a task if this indicator is turning.

Accessing Setup Tasks

You will perform many of the setup tasks required to get your application up and running in the Setup and Maintenance work area. This work area is part of the Functional Setup Manager, which you can use to create implementation projects and manage the assignment of setup tasks to implementation teams. For the setups covered in this guide, you will access tasks by searching on their names.

There are two ways of searching for setup tasks:

1. You can search for the task name on the All Tasks tab on the Overview page in the Setup and Maintenance work area.

    > ✏️ **Note**
    > The first time you navigate to the Setup and Maintenance work area, the application displays the Getting Started with Oracle Fusion Applications page. You can reach the Overview page, by clicking **Done**.
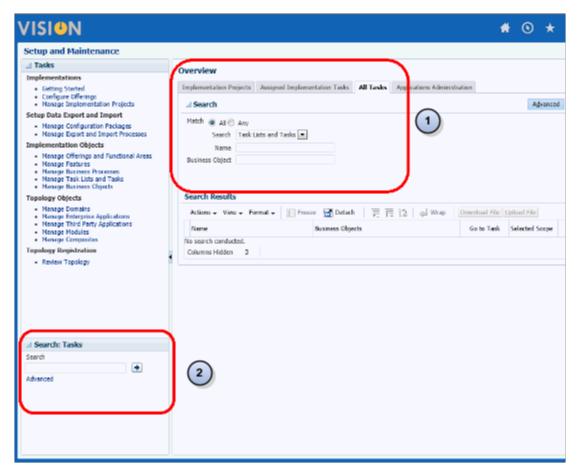
2. You can use the search for the task in the left-hand Regional area.

    The Regional search provides the quickest way of searching for a task because you don't have to navigate to the Overview page first, but this search is only available when you are working in the Setup and Maintenance work area.

ORACLE®

The following figure shows the two areas where you can search for setup tasks.

Tip

When searching for setup tasks, use the percent sign (%) to represent missing letters or words. For example, to search for the Manage HCM Role Provisioning Rules task, you can search on manage hcm%rules. The searches are not case sensitive.

ORACLE®

3 Setup Process Overview

Setup Tasks Completed for You in Oracle Sales Cloud

Oracle completes the setup tasks listed in this topic according to the information you provided when you signed up for Oracle Sales Cloud. You can verify or edit the values for each task using the navigation provided in this topic.

> **Note**
>
> If you purchased Oracle Sales Cloud together with another cloud service, such as Oracle Global Human Resources Cloud or Oracle Enterprise Resource Planning (ERP) Cloud, then your environment will have a different starting point.

The following table lists the completed tasks in the order they are implemented. You can review each setup task and make any necessary changes by searching for the task name in the Setup and Maintenance work area and clicking the Go to Task button.

What Oracle Enters for You	Description	Setup Task Name
Your company name	Oracle enters the company name you provided. Most of the other fields on the Edit Enterprise page are for human capital management (HCM) purposes, and so they are not relevant for Oracle Sales Cloud. One exception is the User and Role Provisioning Information region that you can use to modify options for creating users. These options are covered in separate topics and not relevant here.	Manage Enterprise HCM Information
Your corporate address	This is the address you provided. As a best practice, use the same legal corporate address used for tax information. To review and edit the address, you must search for it first by the country where it is located. If you do make any changes, you must remember to click **Save and Close** for the changes to be saved.	Manage Legal Address

ORACLE®

What Oracle Enters for You	Description	Setup Task Name
A legislative data group (for internal application purposes only)	The legislative data group is required for creating a legal employer. Legislative data groups are used for partitioning payroll and related data so they are not important unless you have such integrations. At least one legislative data group is required for each country where the enterprise operates. Sales Cloud-only implementations require only one data group. Oracle enters the legislative data group name as the enterprise name with a LDG suffix.	Manage Legislative Data Groups
A legal entity (for internal application purposes only)	When you create a user who is an employee, you must specify the legal entity created in this setup task. In the Create User UI, the legal entity is called the Legal Employer. You can set up multiple legal entities if your business requires them; but, for Sales Cloud-only implementations, you can assign all employees to just one corporate legal employer created for you. The legal entity name Oracle enters for you is your enterprise name followed by the suffix LE. All of the other entries should be kept as is.	Manage Legal Entity
An association between the legislative data group and the legal entity (for internal purposes only)	In this task, Oracle associated the legislative data group defined in the Manage Legislative Data Group task with the Legal Entity HCM Information.	Manage Legal Entity HCM Information
A business unit (for internal purposes only)	Oracle creates one business unit for creating your employee users. The business unit name is your enterprise name followed by the suffix BU. Because all Sales Cloud transactions occur in one business unit, you can assign all employees to the same corporate business unit.	Manage Business Unit

ORACLE

What Oracle Enters for You	Description	Setup Task Name
Sets the business unit as the default. (for internal purposes only)	Oracle sets the profile option HZ_ DEFAULT_ BU_CRM to the business unit created in the previous step.	Manage Common CRM Business Unit Profile Options

In addition, Oracle creates one user for you. This is the initial user you received in the welcome e-mail. The initial user is provisioned with the following enterprise roles:

- Application Implementation Consultant

- IT Security Manager

- Application Diagnostic Administrator

The initial user can create other users, change security settings, and perform many, but not all, implementation tasks. The user is not provisioned with all the enterprise roles required for setup, but has the ability to assign these roles to herself and to others. For example, the initial user does not have the permission to run and monitor scheduled processes.

Setup Task Summary

Here is a summary of the setups covered by this guide and the setup tasks that you use to carry them out.

Tasks to Complete	Location and Details
Create any additional users to help you with setup. These users are not part of the sales organization. They can be systems integrators you hired for the implementation.	Setup and Maintenance work area: • Manage Job • Manage HCM Role Provisioning Rules Create the user in the Manage Users work area.
Get ready to create users who are part of the sales organization. This involves creating their titles (called resource roles), their organizations, and rules that provision the permissions users need to carry out their jobs.	Setup and Maintenance work area: • Manage Resource Roles • Manage Internal Resource Organizations • Manage Resource Organization Hierarchies • Manage HCM Role Provisioning Rules • Manage Enterprise HCM Information
Create a few test sales users in the UI to test your setups. You need to make sure that all the provisioning rules you created work as intended. You don't want to have any surprises when you import users.	Setup and Maintenance work area: • Manage Internal Resource Organizations

ORACLE

Tasks to Complete	Location and Details
You must create at least one sales administrator user who will set up and maintain territories, sales methods, and other sales-related standards.	Create users in the Manage Users work area.
Import the rest of the sales organization hierarchy by using the template provided by Oracle.	Setup and Maintenance work area: • Manage Enterprise HCM Information • Manage File Import Mappings • Manage File Import Activities
The corporate currency for your application is set to U.S. Dollar. If you use a different currency, then specify the currency by setting a system profile.	Setup and Maintenance work area: • Manage Currency Profile Options • Manage Currencies
Set up the periods you will need for your sales forecasts and reports by creating an accounting calendar.	Setup and Maintenance work area: • Manage Accounting Calendars • Manage Calendar Profile Option
Import geography reference data for the countries where you do business and set up validation for those address elements that will be used in sales territories and forecasts. This step is required if you want to validate addresses and set up sales territories and forecasting based on geographical regions.	Setup and Maintenance work area: • Manage Geographies
Create the sales catalog listing the goods and services you sell. You create the top of the catalog hierarchy manually in the UI and import the rest.	Setup and Maintenance work area: • Manage Product Groups • Manage Product Group Usage • Manage File Import Mappings • Manage File Import Activities

ORACLE

Tasks to Complete	Location and Details
Configure the sales territory management feature so that you are ready to create the sales territory hierarchy.	Setup and Maintenance work area: • Manage Territory Geographies • Manage Territory Hierarchies Territories and Quotas work area: • Enable Dimensions and Metrics
Enable and configure the two types of search in Oracle Sales Cloud: the global search at the top of each page and the work area searches.	Scheduled Processes work area: • Set up the Synchronize Database Search Indexes for CRM Objects process to run every five minutes. Setup and Maintenance work area: • Complete the tasks in the Define Global Search Configuration task group.
Register the system that's the source of your account and contacts data and import your accounts and contacts from a file using templates you can download and modify.	Setup and Maintenance work area: • Manage Community Source Systems • Manage File Import Mappings • Manage File Import Activities
Set up your sales territory hierarchy.	Territories and Quotas work area: • Manage Territory Proposals
Set the following opportunity profile options: • Set opportunity assignment to automatic by setting Assignment Submission at Save Enabled to **Yes**. (Account assignment is automatic by default) • Disable deal protection by setting Opportunity Resource Deal Protection Period to 0.	Setup and Maintenance work area: • Manage Opportunity Profile Options
Run account and opportunity assignment processes: Request Sales Account Assignments and Revenue Territory Based Assignment.	To schedule a process, select **Scheduled Process** under the **Tools** heading in the Navigator.

ORACLE

Tasks to Complete	Location and Details
Optionally, configure sales methods and stages and opportunity close behavior.	Setup and Maintenance work area: • Manage Opportunity Profile Options • Manage Sales Methods and Stages
Set up forecasting options and criteria.	Setup and Maintenance work area: • Select Forecasting Options • Manage Sales Forecasting Escheatable Processes
Optionally, set up Oracle Social Network.	Setup and Maintenance work area: • Manage Oracle Social Network Objects
Optionally, enable Microsoft Outlook integration.	Select **Set Preferences** from the **Personalization** menu.
Optionally, set up Oracle Sales Cloud Mobile on your mobile devices.	Installation involves downloading the application on your mobile device and entering the correct URL.
Customize the application as required. If you are selling to consumers, then you must expose a few additional fields in the simplified user interface.	Different methods are available for customizing list of values, layouts, and different user interfaces. See Getting Started with Oracle Sales Cloud Customizations guide available on docs. oracle.com and the customization topics in the Set Up Sales Cloud Mobile chapter of this guide.

ORACLE®

4 Creating Other Setup Users

About Creating Setup Users

After you have signed in for the first time, you are ready to create other users who will help you with application setup. The initial user is intended for performing security tasks, which include the creation of other users and the granting of additional privileges either to herself or to others.

Although the initial user can perform many of the setup tasks in this guide, this user cannot perform all of them without additional privileges. For example, the initial user cannot run scheduled processes, including the geography import task and indexing for searches.

In Oracle Sales Cloud, the privileges are bundled in what are called enterprise roles. There are two types of enterprise roles. There are job roles, which correspond to the jobs that the person is doing in your organization, and abstract roles, which permit users to carry on tasks that are common to employees and resources.

You provision the setup users we create in this chapter with all the job roles granted to the initial user and you will add one additional job role (Customer Relationship Management Application Administrator) and one abstract role (Employee) to make sure that they can carry out all the tasks specified in this guide. Here is the complete list:

- Application Implementation Consultant (job role)

  Provides access to all setup tasks across all products.

- IT Security Manager (job role)

  Provides access to security tasks, including the ability to assign other enterprise roles.

- Application Diagnostic Administrator (job role)

  Provides access to diagnostic tests and data.

- Customer Relationship Management Application Administrator (job role)

  Provides the ability to administer and manage all aspects of the Oracle Sales Cloud application. This includes configuration, customization, and the resolution of technical issues faced by users.

- Employee (abstract role)

  Provides access to BI reports and the ability to run and monitor background processes.

The setup users are not part of the sales organization, so we don't want them to appear in the sales organization directory. However, there is nothing to stop you from providing the same setup permissions to users in the sales organization, if you need to. And these super users are not the only ones who do setup. In the next chapter, you will learn how to set up sales administrator users who can set up sales territories and perform a wide variety of sales-related setup tasks but do not have these broad permissions.

Before we get started describing the setup you must understand what tasks the application performs when you create users. The application:

- Creates accounts, user names, and temporary passwords

- Sends users an e-mail with their sign-in credentials

- Provisions the users with all the security permissions they need to carry out their jobs

ORACLE®

The application provisions the permissions to users automatically based on provisioning rules that you must set up. Each rule is made up of the condition the user must meet and the sets of permissions you want to assign to the user.

Oracle follows the industry standard Role Based Access Control (RBAC) approach to security. See the Securing Oracle Sales Cloud guide and the Oracle Sales Security Reference Guide for more information about how these roles are organized and what permissions they provide.

Setup Overview

1. Create a job, called Customer Administrator, by using the Manage Job task from the Setup and Maintenance work area.

   You provision setup users with the job roles they need when they are assigned the Customer Administrator job you create in this step. What job you create doesn't really matter because jobs aren't used in Oracle Sales Cloud. You are creating the job only so you can use it as a condition in the rule. Jobs themselves become important only if you implement Oracle HCM Cloud.

   For details, see Creating a Job for Provisioning Setup Users in this chapter.

2. Create a provisioning rule that automatically provisions the following job roles to all users with the Customer Administrator job:

   - Application Implementation Consultant

   - IT Security Manager

   - Application Diagnostic Administrator

   - Customer Relationship Management Application Administrator

   For details, see Creating the Provisioning Rule for Setup Users.

3. Create a separate provisioning rule that provisions every user of type employee with the Employee abstract role. All of your users are employees, so they all receive this role.

   For details, see Creating a Rule to Provision the Employee Abstract Role.

4. Create each setup user as a user of type employee with the Customer Administrator job.

   For details, see Creating a Setup User.

Creating a Job for Provisioning Setup Users
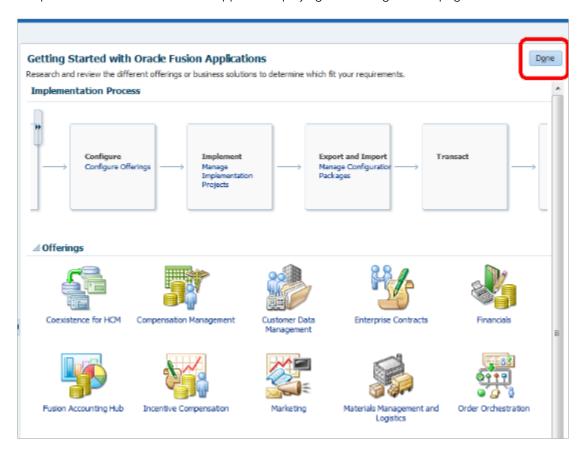
Use this procedure to create a job that you can use to assign setup users with the same implementation privileges as the initial user. You will use this job as a condition in the provisioning rule you create and add it to the user.

Creating the Job

1. Sign in as the initial user.

2. In the **Navigator** menu, select **Setup and Maintenance** under the **Tools** heading.

ORACLE®
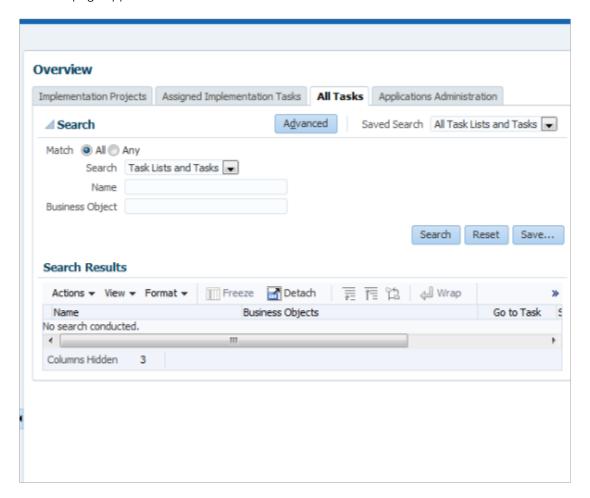
The Setup and Maintenance work area appears displaying the Getting Started page.

3. Click **Done**.

The Overview page appears.

Overview

Implementation Projects | Assigned Implementation Tasks | **All Tasks** | Applications Administration

◢ **Search**   Advanced | Saved Search   All Task Lists and Tasks ▾

Match ● All ○ Any
            Search   Task Lists and Tasks ▾
              Name   [   ]
Business Object   [   ]

                                            Search   Reset   Save...

Search Results

Actions ▾ View ▾ Format ▾   ▥ Freeze   ▦ Detach   ☰ ☰ ⫶   ↵ Wrap   »

  Name   Business Objects   Go to Task   S
No search conducted.
◂ [▥   ] ▸

Columns Hidden   3

4. On the Overview page All Tasks tab, enter Manage Job in the **Name** field.

5. Click **Search**.

6. Click **Go to Task** for the Manage Job task in the Search Results.

   The Manage Jobs page appears.

7. Click **Create**.

ORACLE®

The Create Job: Basic Details page appears.

8. Enter Customer Administrator in the **Name** field.

9. Enter a name without spaces, for example CustomerAdministrator, in the **Code** field.

10. You can keep the other field values as they are because they are not used in Oracle Sales Cloud.

11. Click **Next** at the top of the page.

12. Click **Submit** on the next page, and dismiss the warning by clicking **OK**.

    The job may take a couple of minutes to create. You will receive an e-mail notification that the job was created.

Creating the Provisioning Rule for Setup Users

Use this procedure to create the provisioning rule which automatically provisions users assigned the Customer Administrator job with the job roles required to do all of the setup in this guide..

Creating the Provisioning Rule
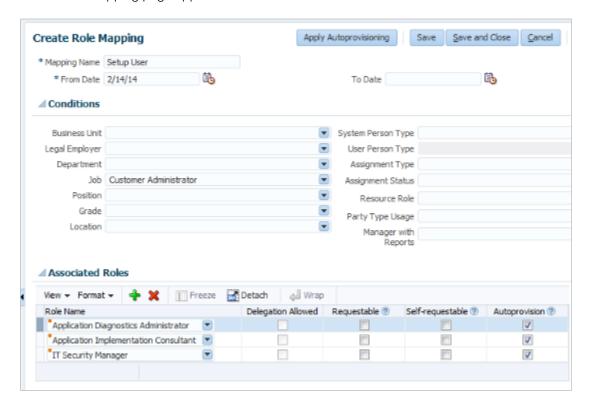
1. Sign in as a setup user and search for the Manage HCM Role Provisioning Rules task in the Setup and Maintenance work area.

2. Click **Go to Task**.

    The Manage Role Mappings page appears.

3. Click **Create**.

ORACLE

The Create Role Mapping page appears.

4. In the **Mapping Name** field, enter Setup User, or another name that will help you identify this mapping in the future.

5. In the Conditions region, select **Customer Administrator** from the **Job** list. This is the job you created earlier.

6. If you have implemented Oracle HCM Cloud, then enter **Active** for **Assignment Status**.

   This additional condition ensures that the provisioned enterprise roles are automatically removed if the user is terminated.

7. In the Associated Roles region, click **Add** to add the following job roles:

   ○ Application Implementation Consultant

   ○ IT Security Manager

   ○ Application Diagnostic Administrator

   ○ Customer Relationship Management Application Administrator

8. Make sure the **Autoprovision** option is selected for all the job roles.

9. Click **Save and Close**.

Creating the Provisioning Rule for the Employee Abstract Role

Use this procedure to create a rule to provision the Employee abstract role to all users who are employees. This is a one-time setup. You can reuse the same rule for all employee users.

Creating the Provisioning Rule

1. While signed in as a setup user, search for the Manage HCM Role Provisioning Rules task in the Setup and Maintenance work area.

2. Click **Go to Task**.

3. In the Manage HCM Role Provisioning page, click **Create**.

4. In **Mapping Name**, enter Employee to make the rule easy to identify.

5. In the Conditions region, select **Employee** from the **Assignment Type** list.

6. If you have Oracle HCM implemented, then enter **Active** for **Assignment Status**.

   This additional condition ensures that the provisioned enterprise roles are automatically removed if the user is terminated.

7. In the Associated Roles region, click **Add** and add the Employee role.

8. Make sure the **Autoprovision** option is selected.

9. Click **Save and Close**.

Creating a Setup User

After you have created the provisioning rules, you are ready to create other setup users in the UI.

Creating a Setup User

1. While signed in as a setup user, select the **Manage Users** link under the **Manager Resources** heading in the Navigator.

2. On the Manage Users page, click **Create**.

   The Create User page appears.

3. Enter the user's name and a unique e-mail address in the Personal Details region.
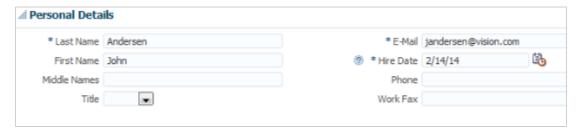
   The application automatically sends the initial sign-in credentials to this e-mail address when you save the record.
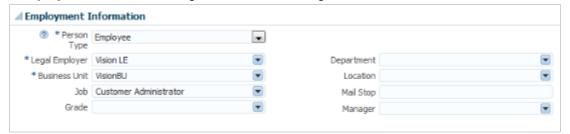
Optionally, you can enter a **Hire Date** or leave this field set to the current date. The **Hire Date** and the remaining fields in this region are not used by Oracle Sales Cloud.
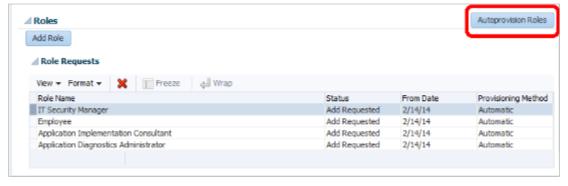
4. In the User Details region, enter the user name.

   If you leave the **User Name** field blank, then the application automatically creates a user name for you. By default, the application uses the e-mail as the user name.

5. In the User Notification region, leave the **Send User Name and Password** option selected because you want the setup users to receive their initial e-mails right away.

6. In the **Employment Information** region, enter the following:

   ○ Select **Employee** from the **Person Type** list. The provisioning rule you set up is based on the employee's job.

   ○ From the **Legal Employer** list, select the legal employer Oracle created for you using the information you provided when you signed up with Oracle Sales Cloud. There should be only one value available.

   ○ From the **Business Unit** list, select the business unit created for you when you signed up. There should be only one entry.

   ○ From the **Job** list, select **Customer Administrator**, the job you just created.

7. Click **Autoprovision Roles**.

The **Roles** region displays the following roles:

- ○ Application Diagnostics Administrator

- ○ Application Implementation Consultant

- ○ Customer Relationship Management Application Administrator

- ○ IT Security Manager

- ○ Employee

8. Click **Save and Close**.

    The application sends the e-mail with the initial credentials.

5 Getting Ready to Create Sales Users

What You Must Do Before Creating Sales Users

Creating sales application users requires a bit more preparation than creating setup users. When you create sales application users either in the UI or by importing them from a file, you not only provision the permissions the users need to do their jobs, but you also build the organization chart for your sales organization. This means that you must set up not only the provisioning rules, but also the elements that the application will use to create the organization chart. These include the root of the organization chart and the names of the roles the resources play in the organization.

You are getting ready to create two types of application users. There are members of the sales team without any system administration duties. These are the salespersons, the sales managers, and the sales vice presidents. And there must be at least one sales administrator user who will set up and administer the sales territories and sales processes.

Setup Overview

1. You must assign a resource role, a name describing the role each resource plays in the organization, to each sales user you create. The resource roles display right underneath user names in the resource directory and elsewhere in the UI.

   You also use the resource roles as conditions in your provisioning rules. For example, you assign the Sales Manager job role to a user with the Sales Manager resource role.

   Oracle provides standard resource roles, which correspond to the available job roles. For sales, these resource roles include:

   - Sales Administrator

   - Sales Manager

   - Sales Vice President

   - Salesperson

   If you want other job titles to display for your users, or if you want to provision some users with special privileges, then you must create additional resource roles using the Manage Resource Roles task from the Setup and Maintenance work area.

   For example, you must create a CEO resource role if you want to include the CEO title in your organization chart. It's not one of the resource roles created for you.

   You must also create additional resource roles, if you want to provide a small subset of resources with additional privileges. For example, if one of the sales managers in the organization is also in charge of maintaining territories and sales processes, you want to create a new resource role that you can provision with both the sales manager and the sales administrator job roles.

   In our case study, Vision Corp. creates just two additional resource roles: CEO and Sales Operations Manager. The sales operations manager is provisioned with the Sales Administrator job role so that he can set up and administer territories and sales processes.

ORACLE

For details, see Creating Additional Resource Roles in this chapter.

2. Create a resource organization for the top manager in your hierarchy using the Manage Internal Resource Organizations task from the Setup and Maintenance work area.

   You must assign resource organizations to all the manager users you create. All direct reports who are not managers inherit the organization.

   While you must use the Manage Internal Resource Organizations task to create the resource organization for the manager at the top of the hierarchy, you can create the rest of the resource organizations while creating users in the UI or while importing them.

   As you create users, the application creates an organization hierarchy that you can use to browse through the sales organization's resource directory.

   For details, see Creating a Resource Organization in this chapter.

3. Next, you must designate the resource organization you just created as the top of your organization hierarchy, by using the Manage Resource Organization Hierarchies task in the Setup and Maintenance work area.

   For details, see Designating a Resource Organization as the Top of the Sales Hierarchy in this chapter.

4. Decide what job roles you want to assign to your users.

   Remember that you are not restricted to assigning one job role to a user. For example, you will want to provision the sales manager in charge of determining sales territories and sales processes with the Sales Administrator job role in addition to the Sales Manager job role. This will enable this resource to perform the required sales setups.

   You must create at least one user with the Sales Administrator job role to perform these setups.

5. Using the Manage HCM Role Provisioning Rules task, set up the provisioning rules to automatically provision the appropriate job roles and the Resource abstract role to your users based on their resource role. You must create a provisioning rule for every resource role. This includes the resource roles Oracle provides and those you created.

   For details, see Creating Rules to Automatically Provision Enterprise Roles to Sales Users in this chapter.

6. When you create users, the application automatically sends e-mails with the sign-in credentials. Because you do not want members of the sales organization signing into your environment while you are setting it up, you will redirect these e-mails to one of the setup users. This is accomplished by entering the alternate e-mail address in the Edit Enterprise page, which you can access by using the Manage Enterprise HCM Information task from the Setup and Maintenance work area.

   For details, see Designating a Single User to Receive All Credential E-Mails in this chapter.

Creating Additional Resource Roles

This topic describes how to create additional resource roles.

After you create a resource role, you must create the appropriate provisioning rules to provision the user with the required job and abstract roles. The resource role by itself is only a title.

Creating a Resource Role

1. Sign in as a setup user and search for the Manage Resource Roles task in the Setup and Maintenance work area.

2. Click **Go to Task**.
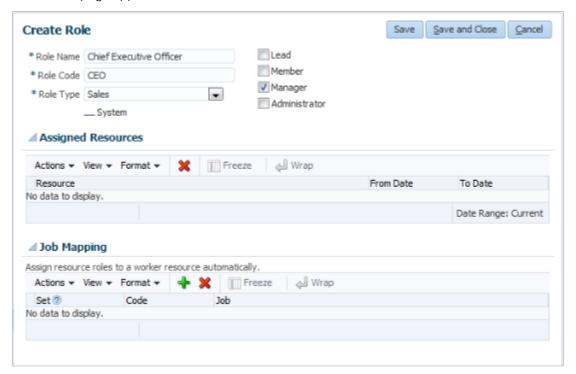
   The Manage Resource Roles page appears.

3. If you want to review all the existing resource roles to verify that it is necessary to create a new role, then click Search without entering search criteria.

   All the available resource roles are listed. Roles that are predefined by Oracle are labeled **System**.

4. Click **Create** to create a new resource role.

   The Create Role page appears.

5. In the **Role Name** field, enter the name of the resource role as it will appear in the application UI, for example, CEO.

6. In the **Role Code** field, enter a unique internal name. No spaces are permitted. If you are importing users from a file, then you must include this code in your file rather than the name.

7. Select the **Manager** option, if the resource role belongs to a manager, or the **Member** option, if the resource role belongs to an individual contributor.

8. From the **Role Type** list, select **Sales** to classify the role that you are creating.

9. Click **Save and Close**.

Creating a Resource Organization

Use this procedure to create the resource organization for the top manager in your sales organization, usually the CEO.

You must create a resource organization for every manager in your sales organization, but you can save time by creating the resource organizations while you creating users in the UI or by importing them. When you import users from a file, you can create the resource organizations automatically from the information you include in the file itself.

Creating a Resource Organization

1. While signed in as a setup user, search for the Manage Internal Resource Organizations task in the Setup and Maintenance work area.

2. Click **Go to Task**.

   The Manage Internal Resource Organizations page appears.

3. Click **Create**.

   The Create Organization: Select Creation Method page appears.

4. Select **Option 2: Create New Organization**.

5. Click **Next**.

6. Enter the name of the resource organization in the **Name** field. This is the name that will be visible in the resource directory.

   Note that:

   - Each resource organization name you enter must be unique.

   - The names do not have to correspond to any formal organization in your enterprise. They are there solely to create a resource directory.

   - Do not use managers' names, as you may want to reassign the organizations to others later.

7. In the Organization Usages region, click **Add Row** and select **Sales Organization**.

8. Click **Finish**.

Designating a Resource Organization as the Top of the Sales Hierarchy

After you have created the resource organization for the top person in the sales organization hierarchy, designate that resource organization as the top of the sales hierarchy in the application.

Designating the Organization You Created as the Top of the Sales Hierarchy

1. Sign in as a setup user and search for the Manage Resource Organization Hierarchies task in the Setup and Maintenance work area.

2. Click **Go to Task**.

   The Manage Resource Organization Hierarchies page appears.

3. Click **Search**.

ORACLE®
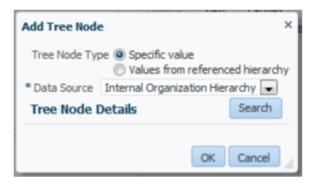
4. In the search results, select the **Internal Resource Organization Hierarchy** link. This value is supplied by Oracle.

   The View Organization Hierarchy: Internal Resource Organization Hierarchy page appears.

5. From the **Action** menu at the top right-hand corner of the page, select **Edit This Hierarchy Version**.

   The **Edit Organization Hierarchy Version** page appears.

6. Click **Add** in the Internal Resource Organization Hierarchy region.

   The Add Tree Node window appears.

7. Click **Search**.

   The Search Node window appears.

8. Click **Search** again in the Search Node window.

9. In the Search Results list, select the resource organization that you created for the top person in the hierarchy.

10. Click **OK**.

    The application returns you to the Edit Organization Hierarchy Version page.

11. Click **Save and Close**.

12. When a warning appears, click **Yes**.

Creating Rules to Automatically Provision Roles to Sales Users

You must create rules to automatically provision Oracle Sales Cloud application users with the job and abstract roles they require to perform their jobs before you create users. The provisioning is based on the resource role that you assign to a user, so you must create a rule for every resource role you use in your organization. You must create rules to provision all of the resource roles provided by Oracle as well as all the additional resource roles you created, such as the CEO.

Creating a Provisioning Rule

1. Sign in as a setup user.

2. Navigate to the Setup and Maintenance work area and search for the Manage HCM Role Provisioning Rules task.

3. Click **Go to Task**.
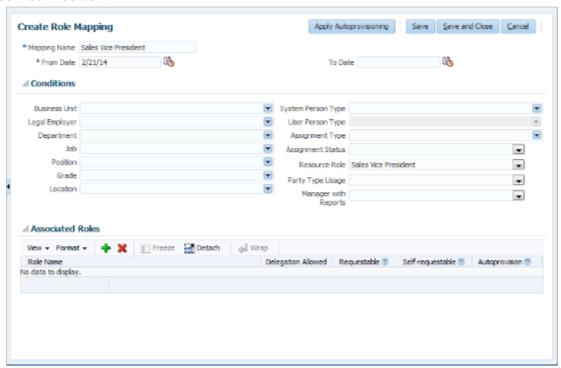
   The Manage Role Mappings page appears.

4. Click **Create**.

   The Create Role Mapping page appears.

5. In the **Mapping Name** field, enter a name that will help you identify the mapping, for example, Sales Vice President.

6. In the Conditions region, select the resource role you want to provision from the **Resource Role** list. For example, **Sales Vice President**.

7. If you have implemented Oracle Global Human Resources Cloud Service, then enter **Active** for **Assignment Status**.

   This additional condition ensures that the provisioned roles are automatically removed if the user is terminated in Global Human Resources.

8. In the Associated Roles region, click **Add** to add the roles you want to provision. For the sales vice president, you add the following:

   ◦ Sales Vice President

   ◦ Resource

   > ✎ Note
   >
   > Each sales resource must be provisioned with both the Resource and Employee abstract roles. You already created a rule to provision the Employee abstract role when you created setup users.

9. Make sure the **Autoprovision** option is selected for all the roles.

10. Click **Save and Close**.

Designating a Single User to Receive All Credential E-Mails

You can redirect the e-mails with user credentials and temporary passwords to a single user. For example, you may want to send all of the credential e-mails to one of the setup users, so that you can sign in as different sales users and test your setups.
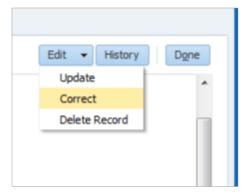
> **Note**
>
> The application sends the e-mails with initial passwords only once, so, if you choose to send the initial e-mail to a setup user, you will have to forward the credentials to the real user yourself.

Designating a Single User to Receive the Credential E-Mails

1. While signed in as a setup user, navigate to the Setup and Maintenance work area and search for the task Manage Enterprise HCM Information.

2. Click **Go to Task**.

3. Click **Edit** in the top right hand corner of the Enterprise page, and select **Correct**.

The Edit Enterprise page appears.

4. In the User and Role Provisioning Information region, enter the e-mail address of the user to receive the credential e-mails in the **Alternate Contact E-Mail Address** field.

5. Make sure the **Send User Name and Password** option is set to **Yes**.

6. Click **Submit**.

7. Click **Done**.

8. Dismiss the warning by clicking **Yes**.

The user e-mail you specified will continue to receive all credentials e-mails until you clear the **Alternate Contact E-Mail Address** field.

6 Creating Sales Users in the UI

About Creating Sales Users in the UI

After you have defined the top of resource organization hierarchy and set up the provisioning rules, you are ready to test your setup by creating a few users in the UI. You should create the top user in the hierarchy, a user with sales administrator privileges and a few others to make sure your provisioning rules work correctly. You will probably want to import the rest of the users as described in the next chapter.

Setup Overview

1. Create the top user in the hierarchy and assign her the top resource organization you created in the previous chapter. You do not assign a manager for this user.

2. Create the rest of the users, starting right below the top of the hierarchy. You work your way down because you must select the manager for every user you create.

   For details, see Creating Sales Users in the UI topic in this chapter.

Creating Sales Users in the UI
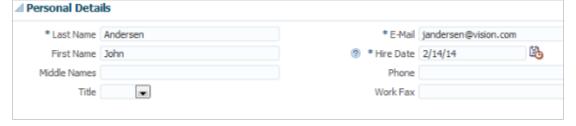
Use this procedure to create sales users in the UI.

Creating a Sales User in the UI

1. While signed in as a setup user, select the **Manage Users** link under the **Manager Resources** heading in the Navigator.

2. On the Manage Users page, click **Create**.

   The Create User page appears.

3. Enter the user's name and a unique e-mail address in the **Personal Details** region.

   The application normally sends the initial sign-in credentials to this e-mail address when you save the record, but, because you earlier specified an alternate e-mail address in the Enterprise page, the e-mail will be sent to the alternate e-mail address instead.

   You can leave the **Hire Date** as is or enter another date. The hire date and the remaining fields are not used by Oracle Sales Cloud. They are important only if you implement Oracle Human Capital Management Cloud.

   ⊿ **Personal Details**

* Last Name	Andersen	* E-Mail	jandersen@vision.com
First Name	John	⑦ * Hire Date	2/14/14
Middle Names		Phone	
Title	▾	Work Fax	

4. In the User Details region, enter the user name.

ORACLE®

If you leave the **User Name** field blank, then the application automatically creates a user name for you. By default, the application uses the e-mail as the user name.

5. In the User Notification region, leave the **Send User Name and Password** option selected. You want the credentials e-mail to be sent to the alternate user you specified.

6. Make the following entries in the Employment Information region:

   ○ Select **Employee** from the **Person Type** list.

   ○ From the **Legal Employer** list, select the legal employer Oracle created for you using the information you provided when you signed up with Oracle Sales Cloud. There should be only one value available.

   ○ From the **Business Unit** list, select the business unit created for you when you signed up. There should be only one value available.
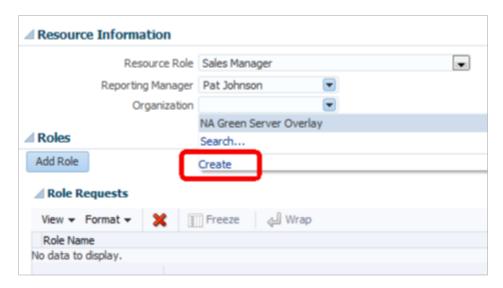
7. Make the following entries in the Resource Information region:

   a. From the **Resource Role** list, select the role the user plays in the resource organization.

   b. From the **Reporting Manager** list, select the user's manager. If you are creating the top user in your hierarchy, such as the CEO, you can leave this field blank.

   c. If the user you are creating is a manager, and you already created a resource organization for this manager, then select the resource organization from the **Organization** list.
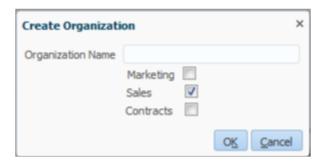
If you did not already create the resource organization, then:
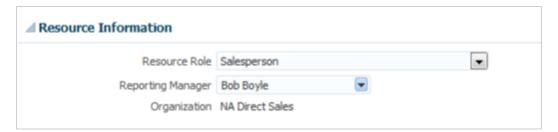
i. Click **Create** link at the end of the **Organization** list.

The Create Resource Organization window appears.
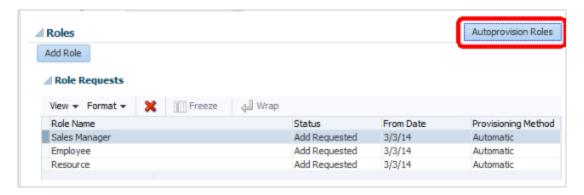
ii. Enter the organization name.

iii. Make sure the **Sales** option is selected and click **OK**.

d. If the user you are creating is a not a manger, then the resource organization is automatically copied from the manager.

ORACLE®

8. Click **Autoprovision Roles**.

The application provisions enterprise roles according to the provisioning rules you set up. Each user must have both the Resource and the Employee abstract roles in addition to the job roles.

7 Importing Users from a File

About Importing Users

Now that you have created several users in the user interface to test your setup, you are ready to import the rest of the users from a file. When you import, you create users and the resource organizations that you must assign to managers.

To import your user data, you must:

- Create a text file with your user data.

- Create a mapping of the attributes in the file to the attributes in the application.

- Create an import activity where you upload the data file and specify the mapping you will use for the import.

To help you with the import, you will download a template from the application which contains most of the attributes you will need for your import. The template comes with a predefined mapping which you will copy and modify.

Setup Overview

1. Use the Manage File Import Mappings task in the Setup and Maintenance work area to download the template for the **Employee Resource** object. The template includes all the required and many of the common attributes you will need to import.

   For detailed steps, see Downloading a Template for Importing Your Data from a File.

2. Replace the sample data in the template with your data, preserving the order of the columns.

   You must add some values the application expects. For example, you must include the names of the business unit and the legal entity and you must include the codes for the resource roles you are using.

   For details on the values that the template expects and how to obtain them, see Understanding the User Import Template topic in this chapter.

3. As described in a previous chapter, the application is set up to immediately send all users that you create an e-mail with their sign-in credentials. Because you don't want users signing into your test environment as you are setting it up, you will want to prevent the bulk of the e-mails from being sent. For the few users you want to use for testing, you will redirect the e-mails to a single user on the setup team. This way you can sign in as different users in the sales organization for testing.

   To do this, you:

   ○ Designate one of the setup users as the person to receive the e-mails as described in the Designating a Single User to Receive All Credential E-Mails topic in the Getting Ready to Create Sales Users chapter.

   ○ Append to your import file the **WorkerProfile_SendCredentialsEmail** attribute. Using this optional attribute, you specify which user records generate the credentials e-mail.

     For details, see Appending Additional Attributes to Your User Import File topic in this chapter.

4. Save the file with your user data as a text (.csv) file.

5. Create a new mapping file for your import by copying the predefined mapping and adding the extra attributes. A mapping tells the application which column in your file corresponds to which attribute in the application.

ORACLE®

For details, see Copying and Modifying the Import Mapping topic in this chapter.

6. Import the file by using the Manage File Import Activity task available from the Setup and Maintenance work area. Use the mapping you copied and modified.

   See Importing Your User Data File topic in this chapter for details.

7. Enable searching of the imported users.

   For details, see Enabling the Search for Imported Users topic in this chapter.

Downloading a Template for Importing Your Data from a File

You can download templates to help you import data with the file-based import tool. The templates include all the common and required fields.
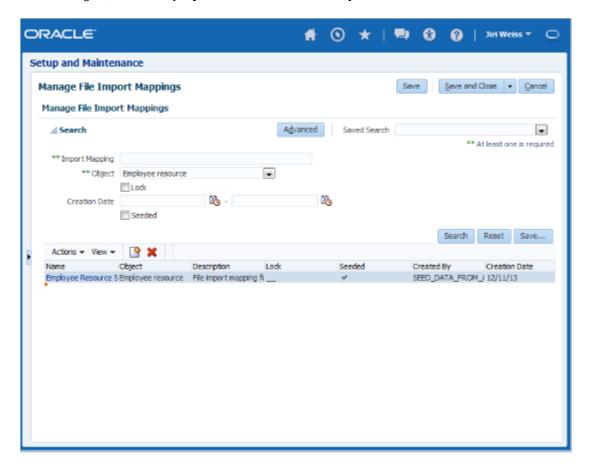
Downloading the Import Template

1. Sign in as a setup or a sales administrator user.

2. Navigate to the Setup and Maintenance work area and search for the Manage File Import Mappings task.

3. Click **Go to Task**.

   The Manage File Import Mappings page appears.

ORACLE®

4. In the Search region, select **Employee resource** from the **Object** list.

5. Click **Search**.

6. Select the **Employee Resource Seeded Mapping** name link.

The Edit Import Mapping page appears.

7. Click **Download Template**.
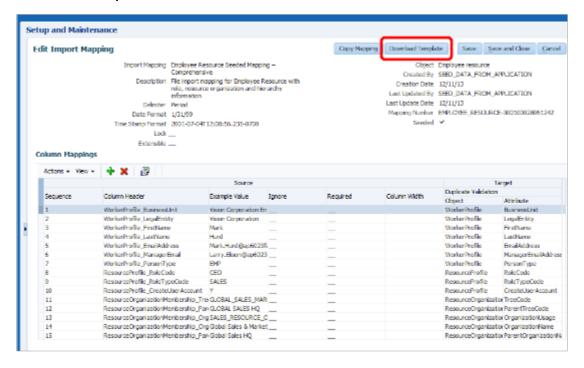
8. Save the template to your desktop.

Understanding the User Import Template

Here is a description of the fields contained in the employee resource import template and the values they expect.

The template file includes a header row with the key attributes for your import, including all the required fields. The attribute name in each column consists of two parts separated by a period. These correspond to selections you make for mapping the import file to the attributes in the application.

The file attributes are arranged in the same order as a mapping Oracle provides for you. So, if you arrange the columns in your import file in exactly the same way as the template, then you can copy and modify this mapping. If you do want to add additional attributes, you can append them to the last column.

The following table lists the attributes in the order they are included in the template. The Value to Import provides instructions for the values each attribute expects.

Template Header Column Name	Value to Import
WorkerProfile_ BusinessUnit	Enter the name of the business unit created for you when you signed up for the service. You can obtain this value from the Business Unit field in the Employee Information region of Create User page, as described in this topic.
WorkerProfile_ LegalEntity	Enter the legal entity created for you. You can obtain this value from the Legal Employer field in the Employee

Template Header Column Name	Value to Import
	Information region of Create User page, as described in this topic.
WorkerProfile_ FirstName	Enter the first name as you want it to appear in the sales application.
WorkerProfile_ LastName	Enter the last name as you want it to appear in the sales application.
WorkerProfile_ EmailAddress	You must enter a unique e-mail address. The application sends the initial sign-in credentials to this address unless you: • Redirect the e-mail to an alternate user • Delay the sending of the e-mail. These options are described in related topics.
WorkerProfile_ ManagerEmail	Enter the manager's e-mail address. The application uses this address to build the management hierarchy, so it must match the e-mail address you entered for the manager.
ResourceProfile_ RoleCode	You must include the internal code rather than the name. For sales, resource role codes provided by Oracle include: • SALES_VP • SALES_MANAGER • SALES_REPRESENTATIVE • SALES_ADMINISTRATOR Follow the procedure in this topic to obtain additional codes.
ResourceProfile_ RoleTypeCode	Always enter SALES (uppercase) in all rows.
ResourceProfile_ CreateUserAccount	Enter a Y to create the user account.
ResourceOrganizationMembership_ TreeCode	Enter GLOBAL_ SALES_ MARKETING.

Template Header Column Name	Value to Import
ResourceOrganizationMembership_ ParentTreeCode	Enter the organization code you entered when you created the top of the resource organization hierarchy.
ResourceOrganizationMembership_ OrganizationUsage	Enter SALES_ RESOURCE_ORG
ResourceOrganizationMembership_ OrganizationName	For each manager, you must enter the name of the resource organization you want to create. This is the name that will appear in the resource directory and elsewhere in the UI. Leave this field blank for each resource role that's not a manager, such as a salesperson.
ResourceOrganizationMembership_ ParentOrganizationName	You must enter the name of the resource organization assigned to the manger of each user. Entry is required for both managers and employees.

The application uses these organization names to build the hierarchy of your organization, so the names must match exactly. |

Obtaining the Names of the Business Unit and Legal Entity

1. Sign in as a setup user.

2. In the Navigator, select **Manage Users** under the **Manage Resources** heading.

3. Click **Create**.

   The Create User page appears.
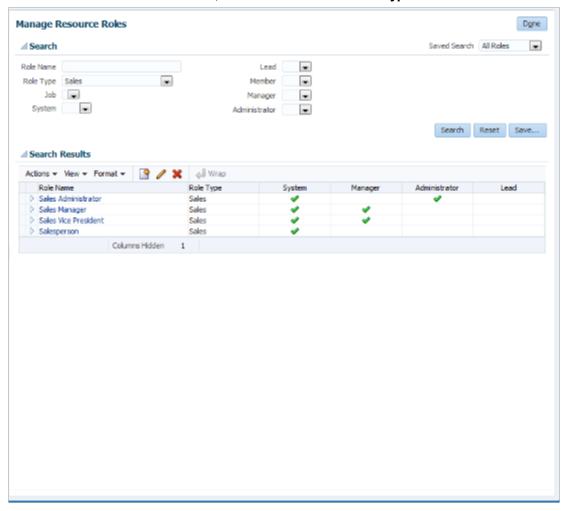
4. In the Employment Information region, select **Employee** as the **Person Type**.

5. You can obtain the business unit and legal entity values for your file from the **Business Unit** and **Legal Entity** lists.

ORACLE®

Obtaining the Resource Role Codes

1. Sign in as a setup user.
2. Search for the **Manage Resource Roles** task in the Setup and Maintenance Work area.
3. Click **Go to Task**.
4. To obtain a list of resource roles for sales, select **Sales** from the **Role Type** list and click **Search**.

5. Click **Edit** for each resource role that you want to import. The value in the **Role Code** field is the value you must include in your file.

ORACLE

Appending Additional Attributes to Your User Import File

You may want to add additional attributes to your file to alter the application's default behavior or import additional user data. Here are a couple of examples.

Specifying Your Own User Names

By default, the application creates user names from the e-mails you enter. If you want to create user names of your own choosing, then append a column to your file with the header **WorkerProfile_Username** and enter the user names.

Selecting Which Users Generate Credentials E-Mails

By default, the application sends an e-mail for every user you create. You can specify which users will generate the e-mail, by appending a column to your file with the header **WorkerProfile_SendCredentialsEmail**.

For users you want to generate the credentials e-mail, enter Y. For all the others, enter N.

Researching Additional Attributes for Inclusion

You can review other user attributes you may want to append to your file by reviewing the documentation in the Oracle Enterprise Repository:

1. Using your browser, navigate to fusionappsoer.oracle.com

2. Sign in as Guest.

3. Search for Employee Resource Import.

4. On the Details tab, select the **HZ_IMP_GROUP_MEMBERS_Reference** link and save the file.
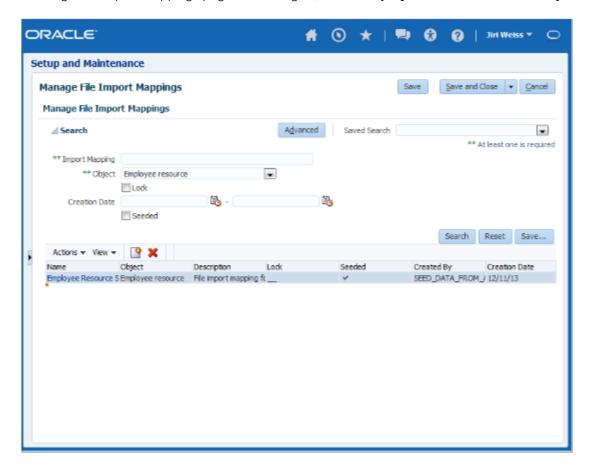
Copying and Modifying the Import Mapping

Because we added attributes that are not in the supplied template, we cannot use the original template mapping during import. Follow the steps in this procedure to create a new mapping. You copy the template mapping, add the additional attributes to that copy, and use the new mapping for your import.

Copying the Predefined Mapping to Create Your Own
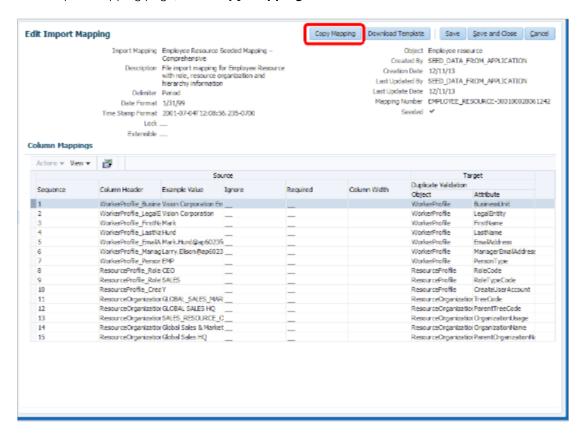
1. Navigate to the Setup and Maintenance work area and search for the **Manage File Import Mappings** task.

2. Click **Go to Task**.

3. In the Manage File Import Mappings page Search region, select **Employee resource** from the **Object** list.

4. Select **Seeded** to restrict the search to templates provided with the application.

5. Click **Search**.

6. Select the **Employee Resource Seeded Mapping** name link.

ORACLE
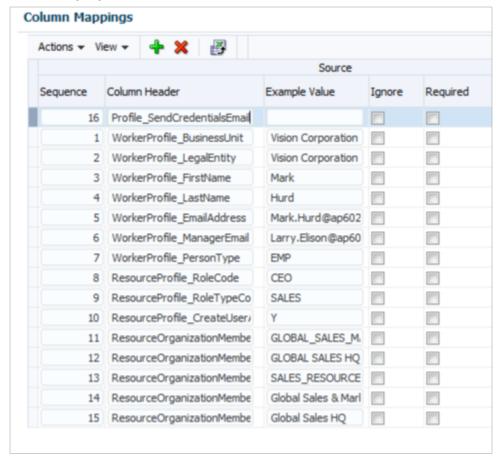
7. In the Edit Import Mapping page, click **Copy Mapping**.

8. Edit the **Import Mapping** name to change it to something more meaningful.

ORACLE

9. In the Column Mapping region, add the additional attributes.

Column Mappings

Actions ▾ View ▾ ➕ ✖ 🖳

Sequence	Column Header	Source Example Value	Ignore	Required
16	Profile_SendCredentialsEmail		☐	☐
1	WorkerProfile_BusinessUnit	Vision Corporation	☐	☐
2	WorkerProfile_LegalEntity	Vision Corporation	☐	☐
3	WorkerProfile_FirstName	Mark	☐	☐
4	WorkerProfile_LastName	Hurd	☐	☐
5	WorkerProfile_EmailAddress	Mark.Hurd@ap602	☐	☐
6	WorkerProfile_ManagerEmail	Larry.Elison@ap60	☐	☐
7	WorkerProfile_PersonType	EMP	☐	☐
8	ResourceProfile_RoleCode	CEO	☐	☐
9	ResourceProfile_RoleTypeCo	SALES	☐	☐
10	ResourceProfile_CreateUser/	Y	☐	☐
11	ResourceOrganizationMembe	GLOBAL_SALES_M.	☐	☐
12	ResourceOrganizationMembe	GLOBAL SALES HQ	☐	☐
13	ResourceOrganizationMembe	SALES_RESOURCE	☐	☐
14	ResourceOrganizationMembe	Global Sales & Marl	☐	☐
15	ResourceOrganizationMembe	Global Sales HQ	☐	☐

For each attribute:

a. Click **Add**.

b. Enter a sequence number corresponding to the sequence of the attribute you added to your file.

c. Enter the column header for the attribute, for example **WorkerProfile_SendCredentialsEmail**.

d. Optionally, enter sample value in **Example Value**, for example, Y.

e. In the Target section, select the **Object**, for example, **WorkerProfile**.

f. Select the target **Attribute**, for example, **SendCredentialsEmail**.

10. Click **Save and Close**.

Importing Your User Data File
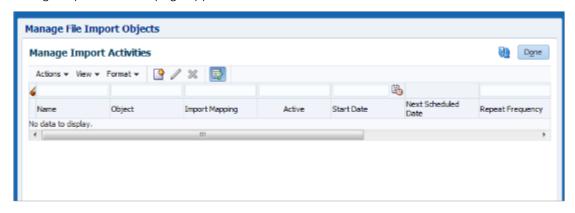
When your import file is saved as a text (.csv) file and you have created your import mapping, you are ready to run the import process by creating an import activity.

ORACLE®

Importing Users from a File

1. Sign in as a setup or a sales administrator user.

2. In the Setup and Maintenance work area, search for the Manage File Import Activities task.

3. Click **Go to Task**.
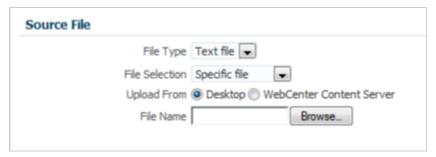
   The Manage Import Activities page appears.

4. Click the **Create** icon.

   The Create Import Activity: Enter Import Options page appears.

5. In the **Name** field, enter a name to identify your import activity in the application.

6. From the **Object** list, select **Employee resource** to import users.

7. In the **Source File** region, select the **Desktop** option. This is the only option that you can use for Oracle Sales Cloud.
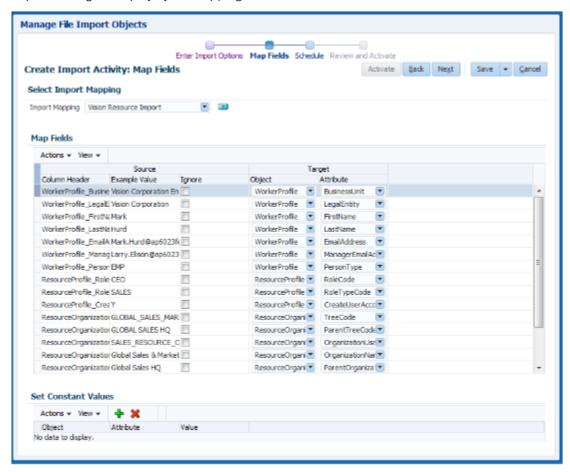
8. Keep the **File Type** as **Text file** and **File Selection** as **Specific file**.

9. Click **Browse** and select your data file.

10. If your file does not use a comma to separate values, then select the correct delimiter in the **Data Type** field.

11. Select the **Header row included** option because the file includes a header.

12. Click **Next**.

    The Create Import Activity: Map Fields page appears.

ORACLE®

13. From the **Import Mapping** list in the Select Import Mapping region, select the mapping you created.

The Map Fields region displays your mapping.

14. Click **Next**.

The Create Import Activity: Schedule page appears.

15. Click **Next**.

The Create Import Activity: Review and Activate page appears.

16. Click **Activate**.

17. You return to the Manage Import Activities page to view the status of your import. You may have to scroll to the right to see the status and periodically refresh the page. An import activity with a status of **Completed** or **Completed with Errors** indicates that the import activity completed. To obtain error details, click the import status to see the logs.
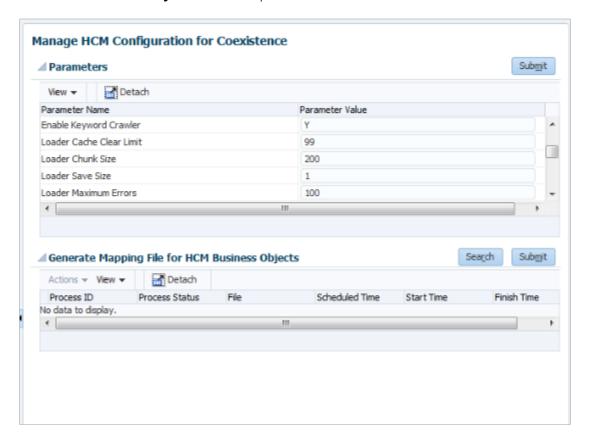
Enabling Search for Imported Users

Use this procedure to set a parameter that enables application search for users you imported. The setting makes it possible to search for the imported users in the Manage Users work area and elsewhere in the application.

ORACLE®

Setting the Search Parameter

1. Sign in as a setup user.

2. From the Setup and Maintenance work area, search for the Manage HCM Configuration for Coexistence task.

3. Scroll down to the **Enable Keyword Crawler** parameter.

4. Change the **Enable Keyword Crawler** parameter value from N to Y.

5. Click **Submit**.

   The application runs a process to enable to you to search for the users you imported.

8 Specifying Your Corporate Currency

About Specifying Corporate Currency

Oracle Sales Cloud supports multiple currencies, multiple daily rates, and currency rate conversion. However, in the use case for this guide, Vision Corporation is enabling only one currency, the U.S. Dollar, which is enabled by default. If you're using another currency as the default currency, you'll need to specify that. For steps, see the topic in this guide, Specifying the Corporate Currency.

The setup of multiple currencies is not covered in this guide. You can find more information on setting up multiple currencies in the help and in the article, How to Setup Additional Currencies For Lead and Opportunity Management (Doc ID 1447018.1), available on My Oracle Support (support.oracle.com).

Specifying Corporate Currency in Oracle Sales Cloud

The default currency, the U.S. Dollar, is enabled by default in Oracle Sales Cloud, and is the default corporate currency. If you're going to be using another currency as the corporate currency, you must specify it, following the steps in this topic.

Following are the high-level implementation steps.

1. Set the default currency profile option, which specifies the corporate currency. You only need to do this if you are using a currency other than the default, the U.S. Dollar.

2. Disable unused currencies, to limit the values in the Currency list of values.

> **Note**
> Upon initial setup, all currencies display as "enabled" in the Manage Currencies setup area. However, even though they show as enabled, the setup of multiple currencies requires the completion of several additional steps. For more information on setting up multiple currencies see the help and the article, How to Setup Additional Currencies For Lead and Opportunity Management. (Doc ID 1447018.1), available on My Oracle Support (support.oracle.com).

Setting the Default Currency Profile Option

Perform the following steps to specify your corporate currency in the default currency profile option.

> **Note**
> Your corporate currency generally will remain unchanged. Oracle strongly recommends that you do not change the Corporate Currency Default profile option value for ZCA_COMMON_CORPORATE_CURRENCY once it is being used in transactions.

1. As a user with access to the profile options pages, such as a setup user, navigate to **Setup and Maintenance**.

2. Search for the task, Manage Currency Profile Options, and click the **Go to Task** icon. The Manage Currency Profile Options page appears.

3. Click **ZCA_COMMON_CORPORATE_CURRENCY**.

4. Ensure that the profile option is set to **US Dollar** at the site level.

5. Click **Save and Close**.

Disabling Unused Currencies

Oracle recommends that you disable unused currencies to reduce the currency lists of values and make the list more manageable for users. Perform the following steps to set any unused currencies as disabled:

1. As a setup user, navigate to **Setup and Maintenance** and search for the task, Manage Currencies.

2. Click the **Go to Task** icon. The Manage Currencies page appears.

3. In the Manage Currencies page, click Search to search for all currencies, without entering any search criteria.

4. Deselect the **Enabled** option for each unused currency.

5. Click **Save and Close**.

9 Setting Up the Accounting Calendar

About Setting Up the Accounting Calendar for Oracle Sales Cloud

The accounting calendar defines time periods including the exact dates for each period. These defined periods, often called enterprise periods, are used for many purposes in Oracle Sales Cloud. Examples include:

- Reports that provide amounts by enterprise period, such as a sales pipeline analysis
- Metrics calculations by period for territory analysis
- The ability to adjust forecast amounts by time period
- Distribution of quota amounts by time period

The period frequency set in your fiscal calendar is the shortest period you can use. Therefore, if you set the period frequency to yearly, then your reports and activities can be for each year, but can't be broken down by month. If you set the period frequency to monthly, then you can break down activities and reports by month and summarize by quarter and year. However, if you set the period frequency to weekly, then you can perform activities and reports by week, quarter, and year, but not by month because the number of weeks per month varies.

Setup Overview

Setting up your accounting calendar requires two steps:

1. Create the calendar. For Oracle Sales Cloud you create only one calendar.

   For details, see Creating the Accounting Calendar.

2. Designate the calendar you just created as the calendar you will use by setting the Accounting Calendar Default profile option.

   For details, see Enabling the Accounting Calendar You Created.

Creating the Accounting Calendar
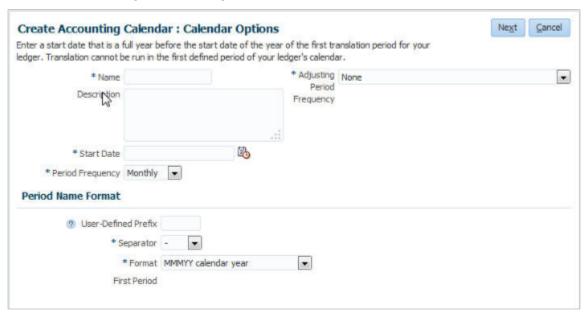
Use this procedure to create the accounting calendar, which sets the exact start and end dates for each period, for each year.

Creating the Calendar

1. Sign in as a setup user.
2. In Setup and Maintenance, search for the Manage Accounting Calendars task.
3. Click **Go To Task**.

ORACLE®
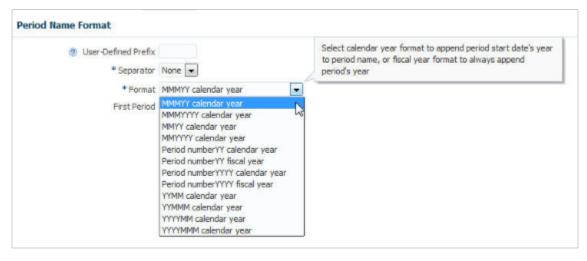
4. On the Create Accounting Calendars page, click **Create**.

5. Name your calendar, for example, Sales Calendar.

6. Leave the **Adjusting Period Frequency** set to None.

7. For **Start Date**, Vision is using 1/1/10.
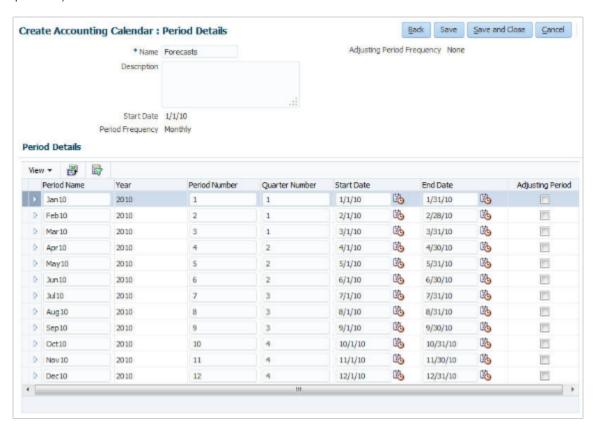
   You cannot change the settings after you start using the application, so consider setting the date to the first date that your company was created. Then you can upload historical data later, if necessary.

8. For **Period Frequency**, select the shortest time period you want to use for reports and activities. For Vision Corporation, we choose **Monthly**. The period starts on the first of the month and ends on the last day of the month, regardless of the number of days or weeks in each month. Another choice, for example, is where the first two months consist of four weeks, and the third month contains 5 weeks.

9. For Vision Corporation, choose **None** for the **Separator**.

10. Select the format to use for period names.

ORACLE

11. Click **Next**. The application generates the periods, with start and end dates, for the first year (2010 for Vision Corporation).

12. If needed, you can manually change the details for each period. Click **Save and Close**.

13. Now you need to generate the periods for each additional year, including the current, or coming year. Open the calendar.

14. Click **Add Year**.

15. Click **Save and Close**.

16. Repeat the last three steps for each year you want to add.

17. Click **Done**.

> **Restriction**
> You cannot change your calendar options after you start using the calendar, such as by generating forecasts.

Enabling the Accounting Calendar You Created

You enable the calendar you created by selecting it to be the default calendar. Many features of Oracle Sales Cloud use the common calendar, so changing the selected calendar in the future can result in the loss of data.

Enabling the Calendar

1. Sign in as a setup user or sales administrator.

2. Search for the Manage Calendar Profile Option task.

3. Click the **Go To Task** icon.

4. On the Manage Calendar Profile Option page, select the Accounting Calendar Default profile option.

5. In the Profile Values table, click **New**.

6. For **Profile Value**, select **Site**.

7. Click the **Profile Value** list, and select the name of the calendar you created.

8. Click **Save and Close**.

ORACLE®

10   Setting Up Geography Reference Data for Territories and Addresses

About Setting Up Geography Reference Data

You must import and set up reference geography data for the countries where you do business if you are setting up sales territories based on geography or want to validate address entry.

Vision Corp., in our case study, is doing both. It plans to set up sales territories based on states in the U.S., so it must import geography data for the U.S. Also, Vision Corp. wants its salespeople to use a list of values to enter the states in their addresses. The state in the address must be validated because invalid entries would cause opportunities to get left out of forecasts.

You must enable validation to the level of granularity you need for your territories. For example, if Vision Corp. decided to set up territories at the postal code level, the company would have to set up validation for state, city, county, and postal code.

Geography Setup Overview

To import and set up geography data:

1. Import geography data for the countries where you do business. You can import Oracle-licensed Nokia data for those countries where the data is available. This includes the U.S., used in our case study, and a growing list of other countries.

   If the licensed Nokia data is not available for a particular country, then the Import Nokia Data action is disabled. In this case, you must license geography data from another vendor and import it from a file. For more information on importing third party geography data, see the Importing Geographies chapter of the Oracle Sales Cloud File-Based Data Import Guide (Doc ID: 1564536.1).

   For more information, see Importing Nokia Geography Reference Data in this chapter.

2. For the countries you imported, enable validation down to address level required for your territories and specify which address elements will require lists of values. When you enable validation on an address element, the application suggests alternatives during address entry. Enabling a list of values requires the user to make a selection from a list. Both validation and lists of values are enforced in the desktop and simplified UIs.

   In our example, Vision Corp.:

   ◦ Enables list of values for entering states in addresses.

   ◦ Enables validation for states because its territories are defined at the state level.

   For more information, see Setting Up Geography Validation in this chapter.

Importing Nokia Geography Reference Data

Use this procedure to import Nokia geography reference data licensed by Oracle. If the country data you want to import is not available, then the Import Nokia Data action is disabled.

ORACLE®

> **Note**
> The geography data is provided by Nokia and is third-party content. As per Oracle policy, this software and documentation may provide access to or information on content and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Importing Nokia Geography Reference Data

1. Sign is as a setup user.

2. In the Setup and Maintenance work area, search for the Manage Geographies task.

3. Click **Go to Task**.
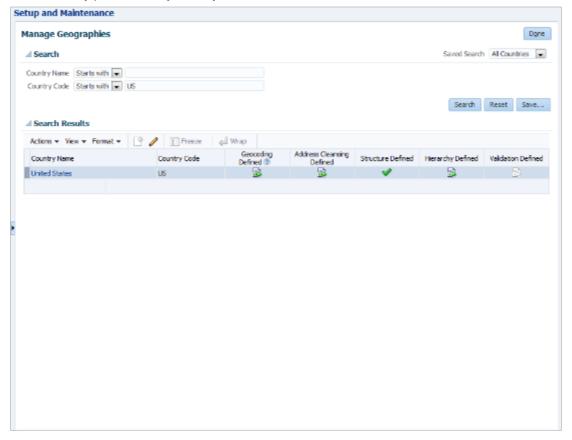
   The Manage Geographies page appears.

4. Enter either the country name or the two-letter ISO code (for example, US or AT).

5. Click **Search**.

   The Search Results display the country.

ORACLE®

6. Before you import, you must ensure that no geography structure or hierarchy already exist for the country you are importing. Existing data is indicated by green check mark icons. For some countries, such as the U.S., a geography structure is already provided for you, so you must delete it:

   a. Click on the **Structure Defined** check mark icon.

       The Manage Geography Structure page appears.

   b. Delete all structure levels by clicking **Delete**.

   c. Click **Save and Close**.

7. Select the country in the search results.

8. Select **Import Nokia Data** from the Actions menu.

9. Click **OK** to dismiss the warning message.

10. Click **OK** to dismiss the confirmation message.

The import of larger countries may require several hours to complete.

You can track the progress of the import process by selecting **Scheduled Processes** from the Navigator menu.
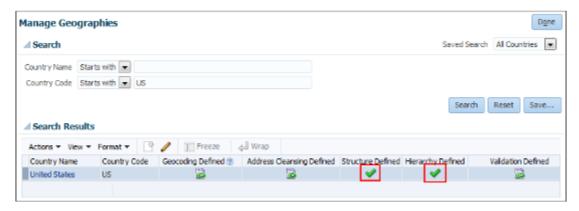
> ✎ Note
>
> To access the Scheduled Processes work area, you must be signed in as a user with the Employee abstract role. The initial user does not have this role assigned, but the other users you created do.

After the import is complete, you can search for the country again in the Manage Geographies page. Check marks now appear in the **Structure Defined** and **Hierarchy Defined** columns indicating the import completed successfully.

The **Geocoding Defined** and **Address Cleansing Defined** columns are used for additional features which you must license from Oracle and set up separately.

- Geocoding makes it possible to display customers in the vicinity of a mobile address. You set up **Geocoding Enabled** for those countries where you are using Around Me functionality in Sales Cloud Mobile.

- Cleansing makes it possible to validate addresses down to the street level.

Setting Up Geography Validation

You must set up geography validation for those geography elements that you plan to use in your sales territories. Setting up validation also helps users fill in missing address information, and validate addresses during entry. For example, you can have users select states or other address elements from lists to ensure accuracy during entry and you can have the application fill in missing values. For example, when the user enters a postal code, the application can retrieve the city and state.

Vision Corp., in our case study, wants its salespeople to use a list of values to enter the states in their addresses. Also, it plans to set up territories at the state level. So validation must be set up at the state level.

Setting Up Geography Validation
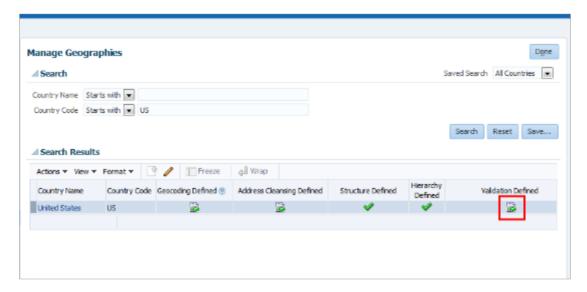
1. In the Setup and Maintenance work area, search for the Manage Geographies task.

2. Click **Go to Task**.

   The Manage Geographies page appears.

3. Search for a country you imported using either its name or its two letter ISO code. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking **Search**.

4. Select the country in the Search Results area.

5. Click the **Go to Task** button in the Validation Defined column.

   The Manage Geography Validation page appears.

6. In the Address Style region, ensure that the **No Styles Format** address style is selected. You define validation for the No Styles Format address style so that the validations are performed for all addresses in the country.

   > **Note**
   > The setup of address styles for your application is done elsewhere, using the Manage Address Formats task.
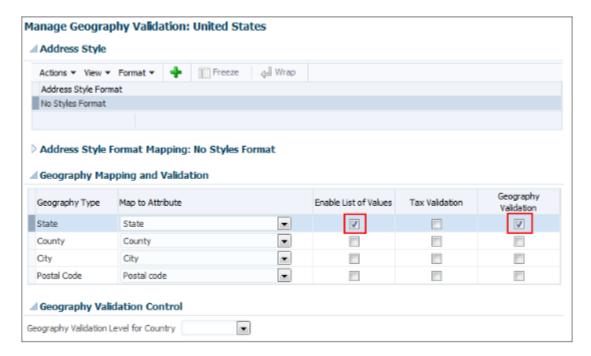
7. Select **Enable List of Values** in the Geography Mapping and Validation region to display the geography type as list of values during address entry in the classic and simplified user interfaces. For example, to have users select states from a list, select **Enable List of Values** for State.

   To prevent data entry errors, Oracle recommends that you enable lists of values at all levels including state, city, and postal code.

8. Select **Geography Validation** for all the geography types that you plan to use in territories.

In our example, Vision Corp. plans to use set up geographies by state, so it selects **Geography Validation** for State.

You must enable geography validation for all geography levels above the level you are planning to use for territories. If Vision Corp. decided to set up territories at the postal code level, it would have to select Geography Validation for state, city, county, and postal code.

> ✏️ Note
> If you do not select the validation for an address element, the application still suggests values to the user during address entry in the classic and simplified UIs, but does not validate the address element.

9. Specify if you want to permit addresses that are not considered valid by the application to be saved by making a selection from the **Geography Validation Level for Country** list.

   ◦ **No validation**, the default value, permits users to save incomplete or incorrect addresses.

   ◦ **Error** permits only valid addresses to be saved.

   Vision Corp. wants to save all addresses including incomplete and invalid addresses, so keeps the **No validation** default value.

10. Click **Save and Close**.

ORACLE®

11 Creating Your Sales Catalog

About Creating the Sales Catalog

You'll need to create the sales catalog so you can:

- Use product as a territory dimension.

- Let salespeople add product groups to leads.

- Let salespeople add product groups to opportunities, where they can also enter revenue amounts.

- Have product revenue available in forecasting.

In the setup area, you create the catalog as a hierarchy of product groups. You can create the product group hierarchy manually in the application, or you can import product groups using file-based import. If your product group hierarchy is small, such as 50 groups, it's easier to create the catalog manually in the application. If you have a large number of product groups, Oracle recommends that you import them. Even if you are importing, you still have to create a root catalog in the UI before you can import any product groups.

> **Note**
>
> While you can include individual products (versus product groups) in your catalog, stock keeping units (SKUs) are not desirable for sales forecasting and not required unless you are integrating with an order management system, such as Oracle Configure, Price and Quote (CPQ) Cloud. In this guide, we'll start by creating the catalog with only product groups. You can always add individual products later, if required.
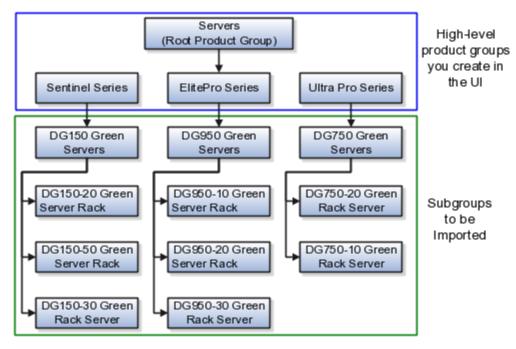
Use Case

In our use case, Vision Corporation is selling a new line of green servers, the ElitePro Series. They will create the first four high-level product groups in the application and import the rest.

ORACLE®

The following figure shows the product group hierarchy to be created.

Setup Overview

Following are the high-level setup steps, which are different depending on whether you are importing product subgroups (grandchildren of the root group) or creating them in the UI.

If you are not importing product groups:

1. Create the root product group in the Manage Product Groups area available from the Setup and Maintenance work area.
2. In the product group setup pages, create the high-level subgroups under this root product group.
3. In the product group setup pages, create the subgroups (grandchildren of the root group) for your catalog.
4. Publish your sales catalog and validate.

For more information on creating product groups in the UI, see the topic Creating Product Groups in this chapter.

If you are importing product groups:

1. Create the root product group in the Manage Product Groups area available from the Setup and Maintenance work area.
2. In the product group setup pages, create the high-level subgroups under this root product group.
3. Download the product group import reference spreadsheets.
4. Download the supplied import template for the Product Group object.
5. Use the downloaded template and enter the product group information.
6. Run the import process.
7. View and verify the imported product groups in the UI.
8. Publish your sales catalog and validate.

For more information on importing product groups, see the topic Importing Product Groups in this chapter.

ORACLE®

Additional Setups for Products

While our use case covers setting up a simple product hierarchy, you can set up additional product functionality, including:

- Product group descriptions and images: When you create product groups, you can include descriptions and images. Whether you should include this detail depends on your intended use. Different interfaces are optimized for different uses:

  - The simplified UI is optimized for quick entry. Salespeople pick the product group from a list in the opportunity products table. They do not browse a catalog, so no descriptions or images are required.

  - The desktop UI includes the ability to browse through the catalog, in addition to directly picking the product group. If you are planning to use this interface, you may want to include more detail.

- Products: You may want to set up individual products, depending on your business requirements.

For more information on creating sales catalogs, see the rest of this chapter and the Oracle Sales Cloud Implementing Sales guide. For more information on the setup of individual products, search the online help using keywords "production information management".

Creating Product Groups

There are no prerequisites to creating your product groups. To begin, create your root product group and then create the nested subgroups to form your product hierarchy.

Creating the Root Product Group

Use this procedure to create the root product group for your sales catalog. In this example, we create a product group for a new product line of green servers that Vision Corporation has introduced.

1. In the Navigator, select **Setup and Maintenance** under the Tools heading.

2. Search for the **Manage Product Groups** task.

3. Click the **Go to Task** icon for the task. The Manage Product Groups page appears.

ORACLE®

4. Click **Create** from the Manage Product Groups region. The Create Product Group page appears.

5. Enter an internal name without spaces in the **Name** field, for example VisionServers. This is not displayed in the catalog.
6. Enter a name that you want displayed in the catalog in the **Display** field, for example Servers.
7. Enter an optional description in the **Description** field.
8. Optionally, enter start and end dates.
9. Make sure the Active check box is checked.
10. Deselect the **Allow Duplicate Children** check box. This ensures that product groups do not appear multiple times in the hierarchy.
11. Select the **Root Catalog** check box.
12. Do not use the **Revenue Role** drop down list.
13. Optionally, if you are using revenue categories, select a **Revenue Category**.
14. Click **Save and Close**.

Creating Product Subgroups

Use the following procedure to create subgroups under the root product group:

1. In the Manage Product Groups page, select the root group in the product groups list.
2. Click the **Subgroups** tab.
3. Click the **Lock** button.
4. Click **Create**. The Create Subgroup page appears.

5. In the Create Subgroup page, enter the details for the subgroup. Do not select the **Root Catalog** check box.

6. Click **Save and Close**.

7. Repeat the steps to create additional levels in your sales catalog hierarchy.

Importing Product Groups

If you don't want to create product groups individually in the application, you can import them using file-based import. Product Group is one of the import objects recognized by Oracle Sales Cloud.

Overview of Importing Product Groups

Following is the high-level process for importing product groups:

1. Download the product group import reference spreadsheets.

2. Download the supplied product group import template.

3. Review the product group import template and understand what values the import process expects. In tandem, review the reference spreadsheets to determine which attributes are required, optional, or conditionally required.

4. Populate your import spreadsheet and save it as a .csv file.

5. Perform the import, during which you pick a mapping that maps attributes to UI fields.

6. Validate that the import was successful.

The sections that follow go through each of these steps in detail.

Downloading Reference Spreadsheets
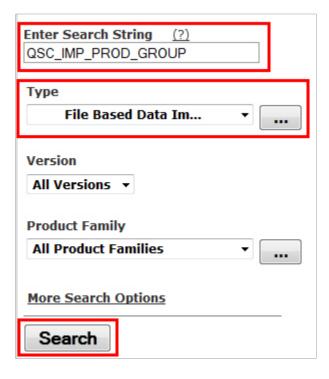
Reference spreadsheets list the product group import attributes and information about each attribute, such as when it's required or not for import, any default value, and any validation performed on the attribute during import.

Use the following procedure to download the spreadsheets:
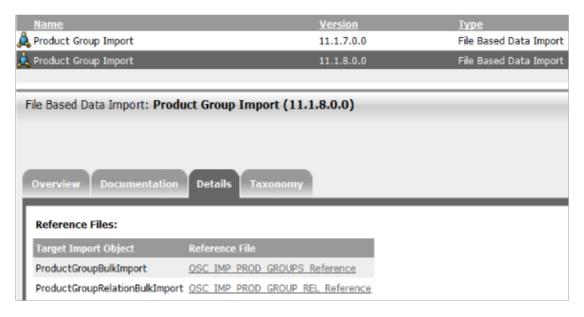
1. Navigate to the Oracle Enterprise Repository at http://fusionappsoer.oracle.com.

2. In the **Enter Search String** box, enter QSC_IMP_PROD_GROUP.

3. For **Type**, pick File Based Data Import.

ORACLE®

4. Click **Search**.

5. In the list that's returned, click the release value for your cloud service. For example, pick 11.1.8.0.0 for Release 8 of Oracle Sales Cloud.

6. Click the **Details** tab.

7. Download and save to your hard drive the following spreadsheets:

   ○ QSC_IMP_PROD_GROUPS_Reference.xls: Contains reference information for fields relevant to product groups.

ORACLE®

○ QSC_IMP_PROD_GROUP_REL_Reference.xls: Contains reference information for fields relevant to set the hierarchical relationship of product groups.

> **Note**
>
> Another reference spreadsheet exists for item import, named QSC_IMP_PROD_GROUP_ITEMS_Reference.xls. It's available for download by selecting the Release 7 version option and then selecting the Details tab.

Downloading the Product Group Import Template

Download the product group import template using the file-based import tool.

1. Sign in as a setup or sales administrator user and click **Setup and Maintenance** in the Navigator.

2. Search for the Manage File Import Mappings task.

3. Click the **Go to Task** icon on the task. The Manage File Import Mappings page appears.

4. In the Manage File Import Mappings page Search region, select **Product group** from the **Object** list.

5. Click **Search**.

6. In the search results, click the **Product Group Predefined Mapping - Product Group Header and Child Entities** mapping name link.

   The Edit Import Mapping page appears.

7. Click **Download Template**.

8. Save the template to your hard drive.

Template Headers and Import Attributes

The product group import template spreadsheet includes a header row with import attributes. It includes all of the required fields, plus several that are optional. The header row names correspond to attribute names for the Product Group file-based import object. These attributes are listed in the reference spreadsheets that you downloaded from the enterprise repository.

The following table lists the column headings in the template; the corresponding, actual import attributes from the reference spreadsheets; and the value that the import process expects.

> **Note**
>
> Optional or unnecessary attributes from the import template are not described in the table. For more information on these other attributes, consult the reference spreadsheets.

- Column Header in Import Template column: Lists the import template column headers. The column headers are arranged in the same order as the predefined import mapping that Oracle provides for you. So, be sure to keep the order of the columns in your import file in exactly the same order as the template. If you need additional attributes, add them after the last column.

- Attribute Name in Reference Spreadsheet column: Lists the attributes that the template column headers map to in the reference spreadsheets.

- Purpose and Expected Value column: Lists the purpose of the attribute and whether the attribute is required.

> ✎ **Note**
> This document provides a brief summary of the value the import process expects. It does not list all of the details that you can find in the reference spreadsheets. You'll want to consult the reference spreadsheets in addition to this document.

Product group import has the concept of a product group ID (PROD_GROUP_ID), also known as the Oracle Fusion ID. This is the unique ID assigned in the Oracle Fusion (Oracle Sales Cloud) database tables for the product group.

Column Header in Import Template	Attribute Name in Reference Spreadsheet	Purpose and Expected Value
PGHeader Reference Number	PgRefNumber	Reference number of the parent product group, used to derive the product group ID. Required if creating a new product group or updating an existing product group record and you are not providing the product group's internal name (PgInternalName). Limited to 50 characters. No default value.
PGHeader Internal Name	PgInternalName	Unique internal name of the product group. Required if you are creating a new product group or updating an existing product group record and you are not providing the product group's reference number (PgRefNumber). Limited to 150 characters. No default value.
PGHeader Language	Language	Code representing the language for the translatable columns PROD_ GROUP_NAME and PROD_ GROUP_ DESC_TEXT. Required if you are creating a new product group or updating an existing product group's name (ProdGroupName) or description (ProdGroupDescText). No default value.

ORACLE®

Column Header in Import Template	Attribute Name in Reference Spreadsheet	Purpose and Expected Value
		You can view valid language codes from the Setup and Maintenance, Manage ISO Languages task.
PGHeader Source Language Flag	SourceLangFlag	Y or N. Indicates whether the language for the record is the primary language for the product group name and product group description.
		Required if you are creating a new product group or updating an existing product group's name (ProdGroupName) or description (ProdGroupDescText).
		No default value.
PGHeader Product Group Display Name	ProdGroupName	Product group name that you want displayed in the catalog.
		Limited to 250 characters.
		Required if you are creating a new product group.
		No default value.
PGHeader Product Group Description	ProdGroupDescText	Text that describes the product group.
		Optional.
		Limited to 1,000 characters.
		No default value.

ORACLE

Column Header in Import Template	Attribute Name in Reference Spreadsheet	Purpose and Expected Value
PGItem PG Reference Number	PgRefNumber	Reference number of the parent product group.
		Required if you are creating a new product group or updating an existing product group record and you are not providing the product group's internal name (PgInternalName).
		Limited to 50 characters.
		No default value.
PGItem PG Internal Name	PgInternalName	Unique internal name of the parent product group.
		Required if you are creating a new product group or updating an existing product group record and you are not providing the product group's reference number (PgRefNumber).
PGRel Parent PG Reference Number	PgRefNumber	Unique number of the parent product group ID.
		Limited to 50 characters.
		Required if you are adding, updating, or deleting a product group's subgroup (child of a group) and you are not providing the parent group's internal name (PgInternalName).
		No default value.

ORACLE

Column Header in Import Template	Attribute Name in Reference Spreadsheet	Purpose and Expected Value
PGRel Parent PG Internal Name	PgInternalName	Unique internal name of the parent product group. Limited to 50 characters. Required if you are adding, updating, or deleting a product group's subgroup and you are not providing the parent group's reference number (PgRefNumber). No default value.
PGRel Child PG Reference Number	PgRelChildRefNumber	Unique internal number of the subgroup, used to derive the product group ID. Limited to 50 characters. Required if you are adding, updating, or deleting a product group's subgroup and you are not providing the subgroup's internal name (PgRelChildInternalName). No default value.
PGRel Child PG Internal Name	PgRelChildInternalName	Unique internal name of the subgroup, used to derive the product group ID. Limited to 50 characters. Required if you are adding, updating, or deleting a product group's subgroup and you are not providing the subgroup's reference number (PgRelChildRefNumber). No default value.

ORACLE

Column Header in Import Template	Attribute Name in Reference Spreadsheet	Purpose and Expected Value
PGRel Relation Type Code	RelationTypeCode	Lookup code that represents the relationship type between product groups: • PRODUCT_GROUP_HIERARCHY - indicates that the product groups are arranged in a hierarchy. • RELATED_REVENUE_GROUP - indicates that the product group of a specific revenue type can be related to another product group. • RELATED_SERVICE_GROUP - indicates that the products in one service product group cover products in another product group. Required if you are adding a product group's subgroup. No default value.

Adding Data to the Product Group Import Template

Next, add sample data to the import template, using the following procedure.

1. Open the import template spreadsheet you downloaded earlier. Create your own version of the spreadsheet. For example, save it as Product_Catalog_Import.xls to your hard drive.

2. In rows 2 through 12, enter the sample data shown in the following table.

> **Note**
> Since either Reference Number or Internal Name is required, but not both, you can omit one of them if you want to.

The following table shows the required column headings in the import template spreadsheet for rows 2 through 12. The second row of the table shows which column each heading aligns with.

PGHeader Reference Number	PGHeader Internal Name	PGHeader Language	PGHeader Source Language Flag	PGHeader Product Group Display	PGHeader Product Group Description
Column A	Column B	Column C	Column D	Column E	Column F

PGHeader Reference Number	PGHeader Internal Name	PGHeader Language	PGHeader Source Language Flag	PGHeader Product Group Display	PGHeader Product Group Description
PGVC1	DG 150 Green Servers	US	Y	DG 150 Green Servers	DG 150 line of Green Servers
PGVC2	DG150-20 Green Rack Server	US	Y	DG150-20 Green Rack Server	DG 150 series 16 core, 128-thread general purpose system
PGVC3	DG150-50 Green Rack Server	US	Y	DG150-50 Green Rack Server	DG 150 series 16 core, 128-thread general purpose system
PGVC4	DG150-30 Green Rack Server	US	Y	DG150-30 Green Rack Server	DG 150 series 16 core, 128-thread general purpose system
PGVC5	DG950 Green Servers	US	Y	DG950 Green Servers	DG950 line of Green Servers
PGVC6	DG950-10 Green Rack Server	US	Y	DG950-10 Green Rack Server	DG 950 series high performing database and enterprise workload server

ORACLE®

PGHeader Reference Number	PGHeader Internal Name	PGHeader Language	PGHeader Source Language Flag	PGHeader Product Group Display	PGHeader Product Group Description
PGVC7	DG950-20 Green Rack Server	US	Y	DG950-20 Green Rack Server	DG 950 series high performing database and enterprise workload server
PGVC8	DG950-30 Green Rack Server	US	Y	DG950-30 Green Rack Server	DG 950 series high performing database and enterprise workload server
PGVC9	DG750 Green Servers	US	Y	DG750 Green Servers	DG750 line of Green Servers
PGVC10	DG750-20 Green Rack Server	US	Y	DG750-20 Green Rack Server	Green rack server backed by the Solaris 10 OS
PGVC11	DG750-10 Green Rack Server	US	Y	DG750-10 Green Rack Server	Green rack server backed by the Solaris 10 OS

Your spreadsheet should now look like the following images.

ORACLE

The following image shows the spreadsheet with rows 1-12 and columns A through E populated with the sample data.

	A	B
1	PGHeader Reference Number	PGHeader Internal Name
2	PGVC1	DG 150 Green Servers
3	PGVC2	DG150-20 Green Rack Ser
4	PGVC3	DG150-50 Green Rack Ser
5	PGVC4	DG150-30 Green Rack Ser
6	PGVC5	DG950 Green Servers
7	PGVC6	DG950-10 Green Rack Ser
8	PGVC7	DG950-20 Green Rack Ser
9	PGVC8	DG950-30 Green Rack Ser
10	PGVC9	DG750 Green Servers
11	PGVC10	DG750-20 Green Rack Ser
12	PGVC11	DG750-10 Green Rack Ser

	C	D	E
1	PGHeader Language	PGHeader Source Language Flag	PGHeader Product Group Display Name
2	US	Y	DG 150 Green Servers
3	US	Y	DG150-20 Green Rack Server
4	US	Y	DG150-50 Green Rack Server
5	US	Y	DG150-30 Green Rack Server
6	US	Y	DG950 Green Servers
7	US	Y	DG950-10 Green Rack Server
8	US	Y	DG950-20 Green Rack Server
9	US	Y	DG950-30 Green Rack Server
10	US	Y	DG750 Green Servers
11	US	Y	DG750-20 Green Rack Server
12	US	Y	DG750-10 Green Rack Server

The following image shows the spreadsheet with rows 1-12, column F populated. Columns G-V are not required attributes, so they are not included here.

ORACLE®

	F
1	PGHeader Product Group Description
2	DG 150 line of Green Servers
3	DG 150 series 16 core, 128-thread general purpose system
4	DG 150 series 16 core, 128-thread general purpose system
5	DG 150 series 16 core, 128-thread general purpose system
6	DG950 line of Green Servers
7	DG 950 series high performing database and enterprise workload server
8	DG 950 series high performing database and enterprise workload server
9	DG 950 series high performing database and enterprise workload server
10	DG750 line of Green Servers
11	Green rack server backed by the Solaris 10 OS
12	Green rack server backed by the Solaris 10 OS

3. In the remaining rows, 13 through 23, use the sample data to enter Reference Number values that establish hierarchical relationships between the product groups in your import file and the product groups that you created in the UI.
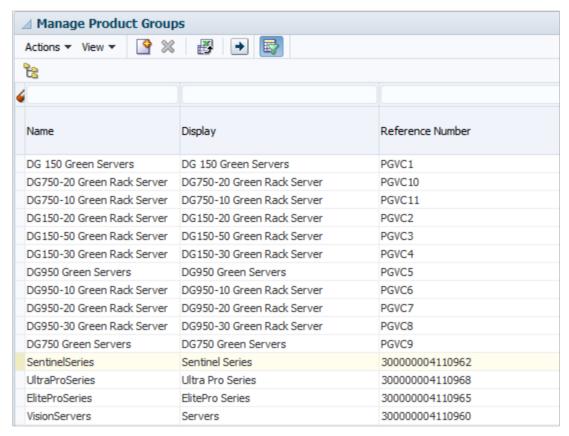
For our use case, we have provided the sample data (see the following table) that will establish these relationships. However, in a scenario where you don't yet have the reference numbers needed to establish these relationships, you would need to find the reference number for the parent product group using the Setup and Maintenance work area.

Here is the procedure you would use if you needed to find and copy the reference numbers:

a. In Setup and Maintenance, navigate to the Manage Product Groups task.

b. In the Manage Product Groups page, find the parent product group and select it. For example click on the **Sentinel Series**.

c. The reference number is shown in the Reference Number column. You may have to add the column to the view by clicking **View** and selecting **Reference Number** under **Columns**.

d. Copy this reference number under the **PGRel Parent PG Reference Number** column in your spreadsheet.

ORACLE

The following image shows an example of how the product groups and the reference numbers might look.

Using the sample data, enter the values from the following table in rows 13 through 23, columns W, Y, and AA. Again, attributes for the headings in columns G through V are not required and are not mentioned here.

PGRel Parent PG Reference Number	PGRel Child PG Reference Number	PGRel Relation Type Code
Column W	Column Y	Column AA
300100062437404	PGVC1	PRODUCT_ GROUP_ HIERARCHY
PGVC1	PGVC2	PRODUCT_ GROUP_ HIERARCHY
PGVC1	PGVC3	PRODUCT_ GROUP_ HIERARCHY

PGRel Parent PG Reference Number	PGRel Child PG Reference Number	PGRel Relation Type Code
PGVC1	PGVC4	PRODUCT_ GROUP_ HIERARCHY
300100062437407	PGVC5	PRODUCT_ GROUP_ HIERARCHY
PGVC5	PGVC6	PRODUCT_ GROUP_ HIERARCHY
PGVC5	PGVC7	PRODUCT_ GROUP_ HIERARCHY
PGVC5	PGVC8	PRODUCT_ GROUP_ HIERARCHY
300100062437410	PGVC9	PRODUCT_ GROUP_ HIERARCHY
PGVC9	PGVC10	PRODUCT_ GROUP_ HIERARCHY
PGVC9	PGVC11	PRODUCT_ GROUP_ HIERARCHY

Your completed spreadsheet should look similar to the following images.
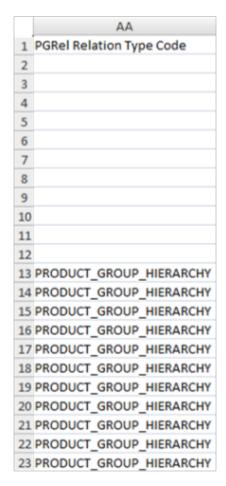
The following image shows columns W and Y, with parent product group and child product group reference numbers.

ORACLE

	W	Y
1	PGRel Parent PG Reference Number	PGRel Child PG Reference Number
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13	300000004110962	PGVC1
14	PGVC1	PGVC2
15	PGVC1	PGVC3
16	PGVC1	PGVC4
17	300000004110965	PGVC5
18	PGVC5	PGVC6
19	PGVC5	PGVC7
20	PGVC5	PGVC8
21	300000004110968	PGVC9
22	PGVC9	PGVC10
23	PGVC9	PGVC11

The following image shows column AA.

	AA
1	PGRel Relation Type Code
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	
13	PRODUCT_GROUP_HIERARCHY
14	PRODUCT_GROUP_HIERARCHY
15	PRODUCT_GROUP_HIERARCHY
16	PRODUCT_GROUP_HIERARCHY
17	PRODUCT_GROUP_HIERARCHY
18	PRODUCT_GROUP_HIERARCHY
19	PRODUCT_GROUP_HIERARCHY
20	PRODUCT_GROUP_HIERARCHY
21	PRODUCT_GROUP_HIERARCHY
22	PRODUCT_GROUP_HIERARCHY
23	PRODUCT_GROUP_HIERARCHY
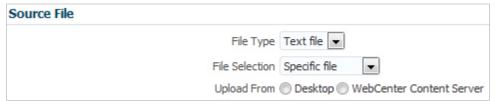
4. When you've finished populating the spreadsheet, save it as a .csv file. For example, save it as Product_Catalog_Import.csv.

Performing the Import
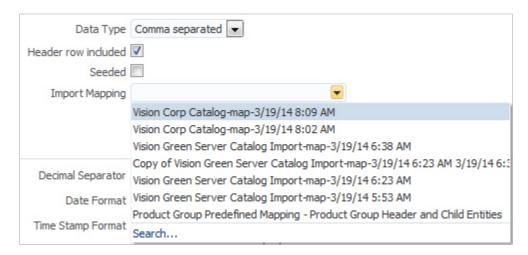
After your import spreadsheet is ready for importing, perform the import. Use the following procedure.

1. Navigate to Setup and Maintenance and search for the Manage File Import Activities task.

2. Click the **Go to Task** icon for the task.
   The Manage Import Activities page appears.

3. Click **Create**. The Create Import Activity: Enter Import Options page appears.

4. In the **Name** field, enter a name for your import. For example, enter Vision Green Server Catalog Import.

5. From the **Object** list, select **Product group**.

6. In the **Source File** region, select the **Desktop** option. This is the only option available for Oracle Sales Cloud.

Source File

File Type	Text file ▾
File Selection	Specific file ▾
Upload From	◉ Desktop ◉ WebCenter Content Server

ORACLE®

7. Click **Browse** and select the file.

8. Select the **Header row included** option because the file includes a header.

9. From the **Import Mapping** list, select the predefined mapping, since in this procedure you did not append any attributes.

Click **Next**. The Create Import Activity: Map Fields page appears. The Map Fields region displays your mapping.

10. Click **Next**. The Create Import Activity: Schedule page appears.

11. Click **Next**. The Create Import Activity: Review and Activate page appears.

12. Click **Activate**.

13. You return to the Manage Import Activities page to view the status of your import. You may have to scroll to the right to see the status and periodically refresh the page. An import activity with a status of **Completed** or **Completed with Errors** indicates that the import activity completed. Click the status link to see detailed information about the import, including any errors.
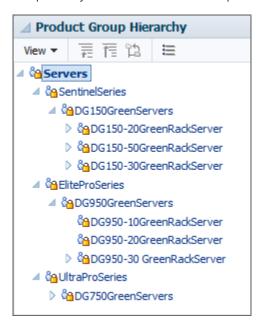
Viewing the Imported Product Groups

After you complete the import, verify that the imported product groups were imported correctly. Use the following procedure:

1. From the Navigator, select **Setup and Maintenance** under the Tools heading.

2. Search for the Manage Product Groups task.

3. Click the **Go to Task** icon for the task.

4. In the Manage Product Groups region, search for **Servers**.

5. Select the **Servers** product group and click the tree icon to view the product groups you imported as a hierarchy. Verify that the hierarchical relationships that you defined have been imported correctly.

For additional information on importing product groups, see the Importing Product Groups chapter of the Oracle Sales Cloud File-Based Data Import Guide (Doc ID: 1564536.1).

Publishing and Validating the Sales Catalog

After you have created your product groups, either directly in the UI or through file-based import (or a combination of the two), you need to publish and enable your sales catalog, and then validate it in the opportunities UI.

Publishing the Sales Catalog

Now that you have verified your imported product groups and their hierarchy, use the following steps to publish your sales catalog.

1. Sign in as a setup user or as the sales administrator user.

2. From the Navigator, select **Setup and Maintenance**, under the Tools menu.

3. Search for the Manage Product Groups task.

4. Click the **Go to Task** icon for the task.

5. In the Product Group page, select the top product group you want to publish, for example EliteProSeries. Most likely, you will not want to publish the root product group because it is too general.

6. Click **Lock**.

7. Click **Publish**.

8. Click **Yes** in the Confirm Publish dialog box.

ORACLE

9. Click **OK** on the confirmation message that is displayed.

10. Click **Save and Close**.

Enabling the Catalog for Use in Sales Cloud

For sales catalogs to be visible in opportunities and leads, you must enable them by associating the root catalog you created with the Base usage. Use the following procedure:

1. Sign in as a setup user or as the sales administrator user.

2. From the Navigator, select **Setup and Maintenance**, under the Tools menu.

3. Search for the Manage Product Group Usage task.

4. Click the **Go to Task** icon for the task.

5. In the Manage Product Group Usage page, in the upper portion of the page, select the record named **Base**.

6. In the Details region in the lower portion of the screen, if a product group is already associated with the Base usage, then remove the product group by selecting it and clicking the clicking **Delete** icon.

7. In the Details section, click the **Select and Add** icon.

8. In the dialog box that appears, search for the root catalog that you created. For example, search for Servers as the Display name.

9. Select the record and click **OK**.

10. On the Manage Product Group Usage page, click **Save and Close**.

Validating the Sales Catalog

Use the following steps to validate the sales catalog:

1. Sign in as a sales manager or salesperson.

2. From the Navigator, select **Opportunities**.

3. In the Opportunities overview page, click **Create Opportunity**.

4. Enter a name for the opportunity, and click **Save and Close**.

5. Search for the opportunity you just created and edit it.

6. In the Revenue Items region, click **Add**.

7. For Type, pick **Group**.

8. Under Product, from the drop down list, click the product group or one of the product subgroups you have created. For example, select **ElitePro Series**.

ORACLE

9. Click **Save and Close**.

12   Enabling and Configuring Search

About Enabling and Configuring Search
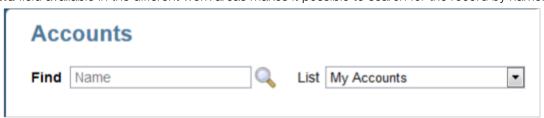
This chapter describes how to enable and configure the two principal ways of searching in Oracle Sales Cloud.

- Global Search

  The global search, located at the top of the application page, makes it possible to search across different objects in the application. When searching for a contact, for example, you retrieve not only information about the contact herself, but also all of the accounts, opportunities, activities, and other information that involve the contact.

- Work Area Search and Lists

  The **Find** field available in the different work areas makes it possible to search for the record by name.

  You can also search for records using other search criteria by creating a saved search. The results of your search are displayed as a list in the work area landing page. For example, you can search for and display a list of all of the active accounts in Canada.

For more information how to use these two types of search, see Using Sales guide (https://docs.oracle.com/cloud/latest/salescs_gs/docs.htm).

The two searches use different technology. This means that the setups you perform for one do not impact the other.

Setup Overview

Here is an overview of the setup steps.

1. Enable work area search by setting up the Synchronize Database Search Indexes for CRM Objects process to run periodically. Oracle recommends that you set the process to run every five minutes.

   You can run the process by signing in as a setup user (or another user with the CRM Application Administrator Duty role) and navigating to the Scheduled Processes work area.

   See Running the Work Area Search Index Process in this chapter for details.

ORACLE

2. Enable global search by setting the system profile option FUSION_APPS_SEARCH_ENABLED to Y at the Site level. This setup is accomplished using the Manage Profile Options task.

   See Enabling the Global Search Profile Option in this chapter for details.

3. Configure global search using the tasks in the Define Global Search Configuration task group. You can search for this task group from the All Tasks tab in the Setup and Maintenance work area.

   a. Using the Manage Search View Objects task, activate the objects you want to search and set the indexing frequency. Until a record is indexed, it does not appear in search results. Optionally, you can change what information gets displayed in the search results and which fields are indexed for searching (adding custom fields, for example).

      See Activating and Configuring Application Objects for Global Search in this chapter for details.

   b. Using the Manage User Interface task, select the objects you activated to display as filters in the global search UI. Users can use the filters to specify which objects they want to search and to filter results.

      See Enabling the Objects You Activated as Filters in the Global Search UI in this chapter for details.

   c. Optionally, you can modify the default configuration of the automatic suggestions users receive as they enter their search terms. For example, the application displays suggestions based on searches performed within the last 30 days by default, but you may want to extend or shorten this interval. These setups are accomplished using the Manage Auto Suggest task.

      See Changing the Behavior of Global Search Automatic Suggestions in this chapter for details.

Running the Work Area Search Index Process
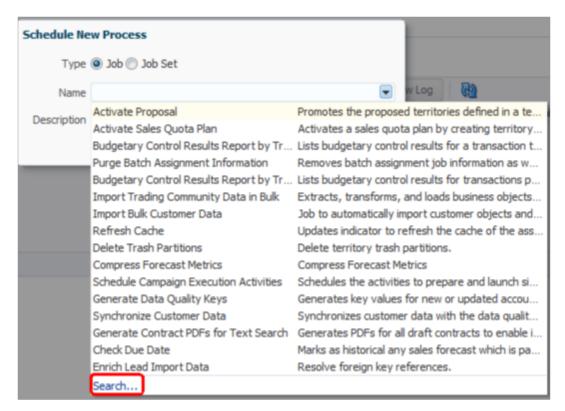
To enable searches in Oracle Sales Cloud work areas, you must set up the Synchronize Database Search Indexes for CRM Objects process to run periodically. Oracle recommends that you set the process to run every five minutes. Until a new record is indexed, it remains unavailable for searching.

Setting Up the Indexing Process to Run Periodically

1. Sign in as a user with the CRM Application Administrator Duty role.

2. From the Navigator, select **Scheduled Processes** under the **Tools** heading.

ORACLE

The Schedule New Process window appears.
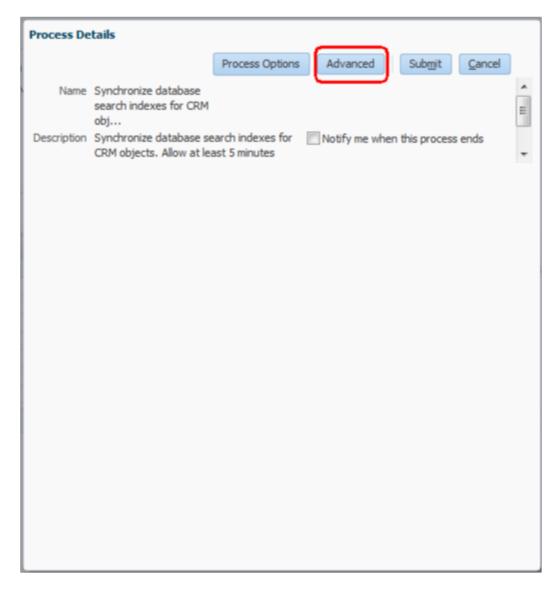
3. Click on the down arrow to the right of the **Name** field and select **Search**.

The Search and Select Name window appears.

4. Enter Synchronize database search indexes in the **Name** field. Capitalization is important.

5. Click **Search**.

6. Select the process name below and click **OK**.

7. On the Schedule New Processes window, click **OK**.

ORACLE®
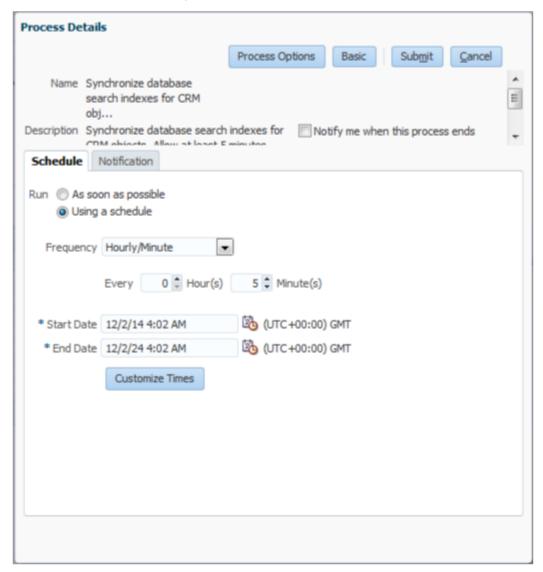
The Process Details window appears.

8. Click **Advanced**.

9. On the Schedule tab, select the **Using a schedule** option.

10. Select **Hourly/Minute** from the **Frequency** list.

11. Specify the index to run every five minutes and enter an end-date far in the future.

12. Click **Submit**.

Enabling the Global Search Profile Option

Use this procedure to enable global search by setting the FUSION_APPS_SEARCH_ENABLED profile option.
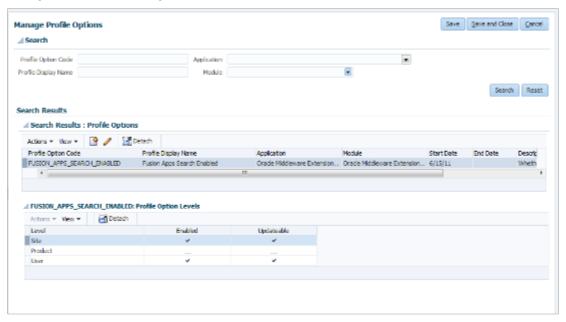
Setting the Profile Option

1. Sign in as a setup user and navigate to the Setup and Maintenance work area.

ORACLE

2. Search for the Manage Profile Options task.

3. Click **Go to Task**.

   The Manage Profile Options page appears.

4. In the Search region, **Profile Option Code** field, enter FUSION_APPS_SEARCH_ENABLED.

5. Click **Search**.

6. Select the **Site** option.

7. Click **Save and Close**.

Activating and Configuring Application Objects for Global Search

Use this procedure to activate and configure each of the objects you want to enable for searching using global search.
For each object:
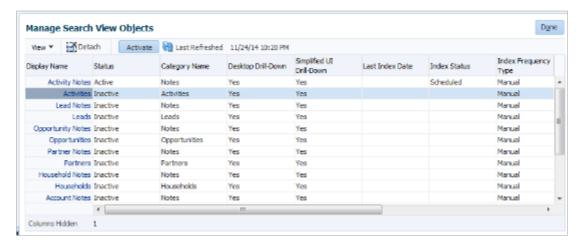
1. Activate the object.

2. Specify the frequency with which the object will be indexed.

3. Optionally, you can modify the list and order of fields indexed in the search and displayed in the search results.

Activating an Object for Search

1. While signed in as a setup user or a sales administrator, navigate to the Setup and Maintenance work area.

2. In the All Tasks tab, search for the Manage Search View Objects task.

3. Click **Go to Task**.

The Manage Search View Objects page appears.

4. Select the object you want to enable for search.

5. Click **Activate**.

   The status for the object changes to Active.

Setting the Indexing Frequency and Schedule

After you have activated the object, you must specify how frequently you want the object records indexed.
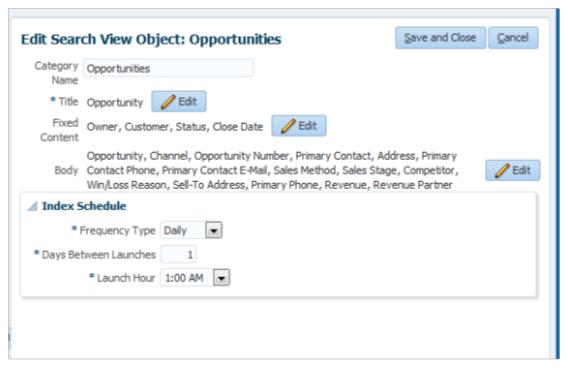
Oracle recommends that you index objects daily during off-hours. You can stagger the indexing times for the different objects to minimize performance impacts.

Specifying the fields to be indexed and displayed in the search results is optional because these are already set up for you.

1. Select the **Display Name** link of the object.

ORACLE

The Edit Search View Object page appears.

2. In the Index Schedule region, select the **Frequency Type** and enter the number of days between index runs and the time, if appropriate.

3. You can change which fields the application indexes and which fields display in search results as described in the following section.

4. When you are done, click **Save and Close**

   The application returns you to the Manage Search View Objects page where you can monitor the status of the index generation for each object.

   The first time your scheduled indexing process runs or any time you modify the list of fields in the object, the application generates a complete index of all the existing records. Subsequently, the process indexes only records that have changed.

   If you end up with many inactive records in your system over time, you can improve the efficiency of your searches by periodically regenerating the full index. This can be accomplished by selecting the object and clicking **Full Reindex**.

Modifying the List of Fields Used for Indexing and Displayed in Search Results
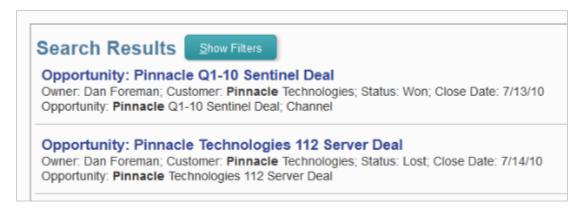
In the Edit Search View Object page, you can also change which fields the application indexes and which fields display in search results. You will want to add any custom fields you want to enable for searching, for example.

- The **Title** and **Fixed Content** fields let you specify which fields are displayed in search results and in what order.

  - **Title** is the linked heading of each search result.

- ○ **Fixed Content** is the text which appears under the heading.

In the following example, the titles starting with the word **Opportunity:** are links which permit users to drill down to the record. The rest of the fields are the fixed content.

- The **Body** field lists the fields that are indexed by the application. The most relevant fields are displayed in the search results, space permitting. While the **Body** field includes all of the standard fields for indexing, you must add any custom fields to the list if you want them available for searches.

To make changes, click **Edit** (the pencil icon) and make your changes in the Edit Search View Object window.

Enabling the Objects You Activated as Filters in the Global Search UI
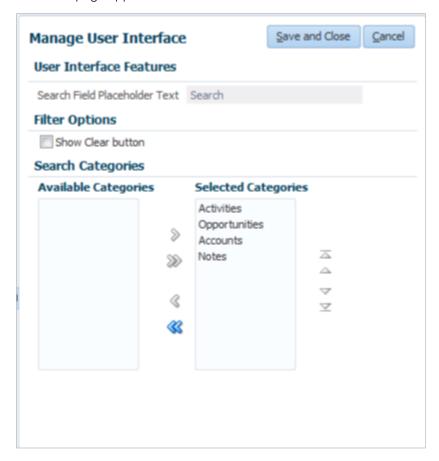
After you have activated the different objects for global search and set up their indexing, you will want to display these objects as filters in the global search UI.

Enabling the Objects as Filters

1. While signed in as a setup user, navigate to the Setup and Maintenance work area.

2. Search for the Manage User Interface task.

3. Click **Go to Task**.

ORACLE®

The Manage User Interface page appears.

4. Use the arrows in the Search Categories region, to move each object to the Selected Categories list.

5. Optionally, select the **Show Clear button** option to display the **Clear** button on the search results page. This button permits users to clear all of the filter options they have previously selected in the search.

6. Click **Save and Close**.

Changing the Behavior of Global Search Automatic Suggestions
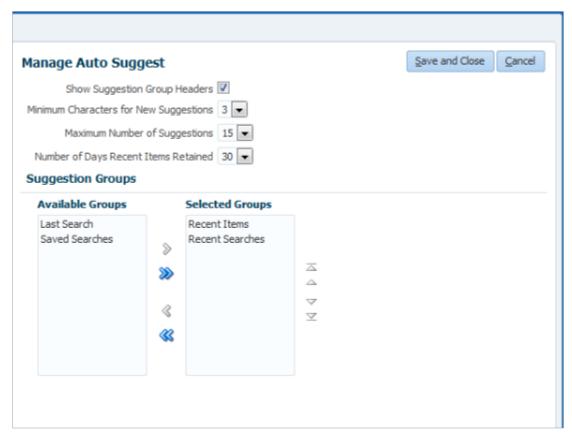
Use this procedure to change the behavior of the automatic suggestions users receive for global search.

Changing the Automatic Suggestions Options

1. While signed in as a setup user, navigate to the Setup and Maintenance work area.

2. Search for the Manage Auto Suggest task.

3. Click **Go to Task** .

ORACLE

The Manage Auto Suggest page appears.

4. On this page, you can:

   ○ Select the type of suggestions users receive in the Suggestion Groups region. By default, only Recent Items and Recent Searches display.

       • Last Search

         Shows the very last search for the signed-in user, including any applied filters.

       • Recent Items

         Recent items the user accessed from the search results.

       • Recent Searches

         Recent searches by the user, including any applied filters.

       • Saved Searches

         Any saved searches, if this functionality has been implemented.

   ○ Show or hide the headers for the suggestion groups by setting the **Show Suggestion Group Headers** option. The headers are displayed by default.

○ Specify the minimum number of search characters users must enter before the suggestions appear, by selecting a value from the **Minimum Characters for New Suggestions** list.

The default is three characters.

○ Specify the maximum number of suggestions users receive, by selecting a value from the **Maximum Number of Suggestions** list.

The default is 15 suggestions.

○ Specify the number of days the recent items are retained, by selecting a value from the **Number of Days Recent Items Retained** list.

The default is 30 days.

5. Click **Save and Close** when you are done.

13   Importing Accounts and Contacts

About Importing Accounts and Contacts

You can import your accounts and contacts into Oracle Sale Cloud using a text file. Alternatively, you can also create accounts and contacts in Customer Center. However, if you want to move a large number of accounts or contacts from other systems into Oracle Sales Cloud then it is recommended you import them into Oracle Sales Cloud.

Oracle Sales Cloud refers to sales account and sales prospects collectively as an Account. Sales accounts are accounts with a sell-to address, and this allows you to assign territories to the sales account. In this scenario, Vision Corporation wants to import accounts and assign territories to them. We will import accounts, with sell-to address, and then import contacts for related to the accounts.

Oracle Sales Cloud provides templates for importing accounts and contacts. These templates are:

- Account Create and Update Seeded Mapping: To import accounts with basic and additional entity information, such as relationship, job information, and sales profile information.

- Contact Create and Update Seeded Mapping: To import contact with basic and additional entity information, such as relationship, job information, and comprehensive contact information.

Before importing contacts, you must ensure that the accounts related to the contacts exist in Oracle Sales Cloud by importing accounts before importing the related contacts.

Oracle Sales Cloud includes a reference attribute, for all import objects, that is used to store the source of a record. You can use this reference attribute to update an existing record in Oracle Sales Cloud with updated records from a source. For example, you must provide the reference attribute of an account when import contacts for the account.

Setup Overview

To import accounts and contacts:

1. Use the Manage File Import Mappings task in the Setup and Maintenance work area to download the templates for the Account and Contact objects. The templates include the most common attributes you use to import an account or a contact. For more information, see Downloading Templates You Can Use for Import.

2. Register the source system in Oracle Sales Cloud. This helps you identify the source system of a record, and is helpful when you are importing from multiple sources. For more information, see Registering the Source System of Your Customer Data Import.

3. Create import files for accounts and contacts using their templates and save them as CSV files. For more information, see Understanding the Import Templates.

4. Optionally, add additional attributes to the import file. For more information, see the Appending Additional Attributes for Import topic in the respective section.

5. Import the file by creating an import activity using the Manage File Import Activity task available from the Setup and Maintenance work area. For more information, see Importing Accounts from a File or Importing Contacts from a File.

Downloading Templates You Can Use for Import
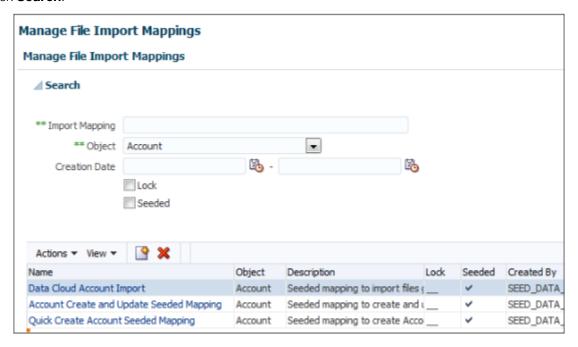
Oracle Sales Cloud provides templates to help you import data with the file-based import tool. The templates include the commonly used fields, in addition to the required fields.

Downloading an Import Template

To download your import template:

1. Navigate to the Setup and Maintenance work area and search for the Manage File Import Mappings task.

2. Click the Go to Task icon.

3. In the Manage File Import Mappings page, select **Account** to download the account template, or **Contact** to download the contact template.

4. Click **Search**.

5. Vision Corp. would like to import complete information for accounts and contacts, so we would select the template that supports comprehensive account and contact information. Select **Account Create and Update Seeded Mapping** to download the account template, or select **Contact Create and Update Seeded Mapping** to download the contact template. The Edit Import Mapping page is displayed.

6. In the Edit Import Mapping page, click **Download Template**.

Registering the Source System of Your Customer Data Import

You can set up source systems to identify the source of the data you are importing. You can specify whether the source system is a spoke system, such as a legacy system, or a purchased system, such as data from a third party provider. The import process uses the combination of source system and source system reference value to identify the existing record. The source system reference value is a unique identifier of the record in that source system.

You can either import source systems or configure them in the Manage Trading Community Source Systems page. In this topic, we will create a source system to identify data you are importing from a legacy application in the in the Manage Trading Community Source Systems page.

To add a source system:

1. Navigate to the Setup and Maintenance work area and search for the Manage Trading Community Source Systems task.

2. Click the Go to Task icon.

3. In the Manage Trading Community Source Systems page, click **Add** from Actions menu. The Create Source System is displayed.

4. In the Code field, enter VISION.

5. In the Name field, enter Vision Applications.

6. In the Description field, enter a description for the spoke system such as Maintains cross reference between Oracle Sales Cloud database and Vision records.

7. Select **Spoke** from the Type list.

8. Select **Enable for Trading Community Members**.

9. Click **Save and Close**.

Importing Accounts

Understanding the Account Import Template

You must understand the columns in the account import template to populate the templates with the correct data.

The template file includes a header row with columns that map to the attributes for the account object. The columns are arranged in the same order as the mapping in Oracle Sales Cloud. You can add additional attributes to the file by appending them after the last column. In case you add additional attributes, you must copy and modify the seeded mapping to create a custom mapping that includes these additional attributes.

You must provide a unique identifier for an account when you use file-based data import to update the record or to associate another record with it. For example, to associate a contact with an account you must uniquely identify the account record. You can identify an account record by providing the Party ID or by providing the record's original system and its original system reference. If an account includes its original system and original system reference when it is imported, then they can uniquely identify the record when it is updated or when other records are associated with it.

Account Import Template

The following table lists the commonly used and required attributes of the account import template in the order they are included in the template. In this scenario, we import a sell-to address for each of the account, so that we can assign territories to accounts.

Column	Description	Sample Value
Organization_ Origin_System	Enter the unique identifier representing the source system for the account. You can manage source systems in the Setup and Maintenance, Manage Trading Community Source Systems task.	VISION

Column	Description	Sample Value
Organization_ Origin_ System_ Reference	Enter the unique identifier of the account within the source system. For example, you can either use the account ID from the source system, or generate a unique ID for the party in Excel.	Vision_ Account1
Organization_ Name	Enter an organization name. Organization names within an import batch must be unique. You must provide an organization name when importing accounts.	PCM Tech Computer Maintenance Global HQ
Party_ Usage_Code	Enter usage code for the account such as organization or partner.	SALES_ACCOUNT
Classification_ Category	Enter the classification category for the account from the list of available categories. You can manage classification categories in the Setup and Maintenance, Manage Classification Categories task.	1987 SIC
Classification_ Code	You must enter one of the classification codes for the classification category you specified. You can obtain a list of the codes using the Manage Classification Categories, Setup and Maintenance task.	2752
Named_ Account_Flag	Enter Y if the account is a named account.	Y
Account_ Owner_ Party_Id	Enter the party ID of the account owner. You can identify the party ID of the account owner by exporting the party object by using the Manage Bulk Data Export, Schedule Export Processes Setup and Maintenance task. If you do not enter an account owner, the current user is assigned as the account owner.	

ORACLE®

Column	Description	Sample Value
Address_ Purpose	Enter the purpose of the address. You can have multiple addresses with different purposes for an account. An account record must include at least one sell-to address to be a customer. You can assign only customer accounts to territories.	SELL_TO
Address_Line_1	Enter the first line of the address.	600 4th Ave
City	Enter the city for the account's address.	IRVINE
State	Enter the state for the account's address.	CA
Postal_Code	Enter the postal code for the account's address.	19102
Address_ Country_Code	Enter the country code for the account's address. The country code should exist in Oracle Sales Cloud. You can manage the list of countries using the Define Geographies, Setup and Maintenance task.	US

You can import additional attributes to an account by appending attributes to the import file. For more information about appending additional attributes for import, see the topic Appending Additional Attributes for Import in this chapter.

You can identify the party ID of the account owner by exporting the party object by using the Manage Bulk Data Export, Schedule Export Processes Setup and Maintenance task.

Appending Additional Account Attributes for Import

You may want to add additional attributes to your files to import additional information for your accounts.

Appending Additional Attributes for Account Import

All available attributes for an import object are included in a reference file located in Oracle Enterprise Repository. Review the reference file to explore other account attributes that are available for import and the possible prerequisite steps for those attributes. You must copy and modify the seeded mapping to create a custom mapping that includes these additional attributes.

ORACLE

The reference file includes the following information:

- All organization profile attributes available for account import.
- The attribute descriptions, including the user interface display name for the attribute if the attribute is displayed on the user interface.
- The data type, length, and validation logic, including the task or work area where you can view or define valid values before importing data.
- The logic for default values, if values are not provided in your source file.

To access the reference file for accounts, follow these steps.

1. Using your browser, enter http://fusionappsoer.oracle.com. Sign in as a user or a guest to Oracle Enterprise Repository.
2. Search for assets, using the following value for your Search String: HZ_IMP_PARTIES_T.

   The results include a set of assets. The assets that apply to file-based import are typically titled <Object> Name Import, such as Contact Import.
3. Within the asset, click the link to the reference file in the Details tab. The file opens in Excel or in another application of your choice. Select the HZ_IMP_PARTIES_T_Reference file to view the attributes for the account object.

Importing Accounts from a File

After creating the import file and creating your import mapping, you create an import activity to import the account.

Importing accounts from a file

To import accounts from a file:

1. In the Navigator menu, select the **Setup and Maintenance** link under the Tools heading.
2. Search for the Manage File Import Activities task.
3. Click **Go to Task**. The Manage Import Activities page appears.
4. Click **Create**. The Create Import Activity: Enter Import Options page appears.
5. In the Name field, enter a name for your import activity.
6. In the Objects list, select **Account** .
7. In the Source File region, select **Desktop**. This is the only option available for Oracle Sales Cloud.
8. Click **Browse** and select your import file.
9. Select the correct delimiter for your import file in the Data Type list. The default is Comma separated.
10. Select the **Header row included** option because the file includes a header.
11. In the Import Mapping list, select **Account Create and Update Seeded Mapping** .

    If you have added additional attributes into your file and created a custom mapping, select the custom mapping that includes these additional attributes.
12. Click **Next**. The Create Import Activity: Map Fields page appears.

    The Map Fields region of the page displays the attribute mapping based on the import mapping you select.

    Optionally, you can ignore blank columns from the import process by selecting the **Ignore** option for the column.
13. Click **Next**. The Create Import Activity: Schedule page appears.
14. Click **Next**. The Create Import Activity: Review and Activate page appears.
15. Click **Activate**.

You can monitor the progress of the import activity processing, and view completion reports for both successful records and errors. To view the status of an import activity, select the import activity in the Manage File Import Activities page.

Importing Contacts

Understanding the Contact Import Template

You must understand the columns in the contact import template to populate the templates with the correct data.

The template file includes a header row with columns that map to the attributes for the objects. The columns are arranged in the same order as the mapping in Oracle Sales Cloud. You can add additional attributes to the file by appending them after the last column. In case you add additional attributes, you must copy and modify the seeded mapping to create a custom mapping that includes these additional attributes.

You must provide a unique identifier for a record when you use file-based data import to update the record or to associate another record with it. If a record includes its original system and original system reference when it is imported, then that pair of attributes can uniquely identify the record when it is updated or when other records are associated with it. For example, to associate a contact with the existing account you must uniquely identify the account record.

Contact Import Template

You must provide the first name and last name of the contact, as well as parent account information when importing a contact.

To import contacts, you must identify the existing account that you want to associate the contact with. You can identify an existing account record either by providing the Party Id or by providing the origin system and origin system reference. You can get Party Id of an account by exporting the Party object using the Setup and Maintenance, Manage Bulk Data Export, Schedule Export Processes task.

When importing contacts or contact information for an account, you must provide relationship reference information in addition to the parent reference. This information is required because a contact can have multiple relationships with an organization, such as an employee or board member. When importing information about a contact you must refer to the specific relationship that you want to import information for. For example, you might want to import information for John Smith the employee or John Smith the board member. If you do not include the reference information for an account-contact relationship, then the import process creates a relationship. Vision Corporation does not have multiple account-contact relationships, so we are not going to provide a specific contact relationship.

The following table lists the commonly used attributes of the contact import template in the order they are included in the template.

Column	Description	Sample Value
Person_ Origin_System	Enter the unique identifier representing the source system for the contact. You can manage source systems in the Setup and Maintenance, Manage Trading Community Source Systems task.	VISION
Person_ Origin_ System_ Reference	Enter the unique identifier of the contact within the source system. For example, you can either use the party Id of the account from the	Vision_ Contact1

ORACLE®

Column	Description	Sample Value
	source system, or generate unique Id for the party in Excel.	
First_Name	Enter the first name of the contact.	Dennis
Last_Name	Enter the last name of the contact.	Peattie
Gender	Enter the gender of the contact.	MALE
Job_Title	Enter the job title of the contact.	President
Address_Line_1	Enter the first line of the contact's address.	212 Herrington Boulevard
Address_Line_2	Enter the second line of the contact's address.	Suite 10
City	Enter the city of the contact's address.	Foster City
State	Enter the state of the contact's address.	CA
Postal_Code	Enter the postal code of the contact's address.	94356
Address_ Country_Code	Enter the country code of the contact's country.	US
Email	Enter the e-mail of the contact.	Dennis. Peattie@usvisioncorp. com
Existing_ Account_ Party_Id	Enter the party ID of the account associated with the contact.	
Existing_ Account_ Origin_System	Enter the code representing the source system for the account associated with the contact.	VISION

Column	Description	Sample Value
Existing_ Account_ Origin_ System_ Reference	Enter the reference number or text representing the source system unique ID for the account associated with the contact.	Vision_ Account1

You can import additional attributes to a contact by appending attributes to the import file. For more information about appending additional attributes for import, see the topic Appending Additional Attributes for Import in this chapter.

Appending Additional Contact Attributes for Import

You may want to add additional attributes to your files to import additional information for your contacts.

Appending Additional Attributes for Contact Import

All available attributes for an import object are included in a reference file located in Oracle Enterprise Repository. Review the reference file to explore other contact attributes that are available for import and the possible prerequisite steps for those attributes.

The reference file includes the following information:

- All organization profile attributes available for contact import.

- The attribute descriptions, including the user interface display name for the attribute if the attribute is displayed on the user interface.

- The data type, length, and validation logic, including the task or work area where you can view or define valid values before importing data.

- The logic for default values, if values are not provided in your source file.

To access the reference file for contacts, follow these steps.

1. Using your browser, enter http://fusionappsoer.oracle.com. Sign in as a user or a guest to Oracle Enterprise Repository.

2. Search for assets, use HZ_IMP_CONTACTS_T value for your Search String to view the contact-related spreadsheet.

   The results include a set of assets. The assets that apply to file-based import are typically titled <Object> Name Import, such as Contact Import.

3. Within the asset, click the link to the HZ_IMP_CONTACTS_T_Reference file in the Details tab. The file opens in Excel or in another application of your choice.

Importing Contacts from a File

After creating the import file and creating your import mapping, you create an import activity to import the contact. Before importing contacts, you must ensure that the accounts related to the contacts exist in Oracle Sales Cloud by importing accounts before importing the related contacts.

Importing contacts from a file

To import contacts from a file:

1. In the Navigator menu, select the **Setup and Maintenance** link under the Tools heading.

2. Search for the Manage File Import Activities task.

3. Click **Go to Task**. The Manage Import Activities page appears.

4. Click **Create**. The Create Import Activity: Enter Import Options page appears.

5. In the Name field, enter a name for your import activity.

6. In the Objects list, select **Contact** .

7. In the Source File region, select **Desktop**. This is the only option available for Oracle Sales Cloud.

8. Click **Browse** and select your import file.

9. Select the correct delimiter for your import file in the Data Type list. The default is Comma separated.

10. Select the **Header row included** option because the file includes a header.

11. In the Import Mapping list, select **Contact Create and Update Seeded Mapping** .

    If you have added additional attributes into your file and created a custom mapping, select the custom mapping that includes these additional attributes.

12. Click **Next**. The Create Import Activity: Map Fields page appears.

    The Map Fields region of the page displays the attribute mapping based on the import mapping you select.

    Optionally, you can ignore blank columns from the import process by selecting the **Ignore** option for the column.

13. Click **Next**. The Create Import Activity: Schedule page appears.

14. Click **Next**. The Create Import Activity: Review and Activate page appears.

15. Click **Activate**.

Verifying Your Imported Data

You can view the list of import activities from the Manage Import Activities page. You can verify your imported data by clicking the Status column for your import activity. After the import is complete, you can verify the imported contacts in the Customer Center. You can search for the account you have associated with the contact, and view the contacts for the account.

14 Setting Up Sales Territories and Assignment

About Setting Up Sales Territories and Assignment

In Oracle Sales Cloud, you assign salespeople to both accounts and individual opportunities to ensure everyone focuses on the most important tasks and shares the information they need to be efficient and effective in dealing with customers.

While all salespeople in your organization have access to basic account information, including customer names, contacts, and addresses, salespeople who are assigned to an account or an opportunity gain additional access:

- Accounts

  Assignees get to share all the details they need to collaborate including, customer interactions, to-do lists, and appointments. Assignees participate in social discussions, share collateral, and collaborate on presentations.

- Opportunities

  You must be assigned to an opportunity (or be in the management chain for someone who is), to view and update opportunities and their revenue lines, and to submit forecasts.

While salespeople can always assign others manually while editing an account or opportunity, Vision Corporation decides to take advantage of automatic assignment. In Oracle Sales Cloud, there are two methods of automatically assigning sales people:

- By setting up sales territories

  The primary method for assigning salespeople to both accounts and opportunities is using sales territories. You can set up the sales territory boundaries based on a wide variety of factors, called dimensions. The most common dimensions include geography, products, customer size, customer type, and industry.

  One set of sales territories takes care of assigning both accounts and opportunities. Sales territories also form the basis for forecasting setup described in a later chapter.

  When you assign salespeople using territories, the territories themselves become associated with the account and opportunity. If you later realign your sales territories or there's turnover in your sales organization, the assignments reflect those changes automatically after you run the assignment process.

  > ✏️ **Note**
  > If you implement Outlook, only the accounts that are part of a salesperson's territory are downloaded when synchronizing.

- By creating assignment rules

  For opportunities, you can assign additional salespeople based on factors that are not covered by territories, such as deal size or product knowledge, by creating rules to supplement territory assignment. But because you cannot use rules for account assignment and because rules are of secondary importance for opportunities, rule-based assignment is not covered in this guide.
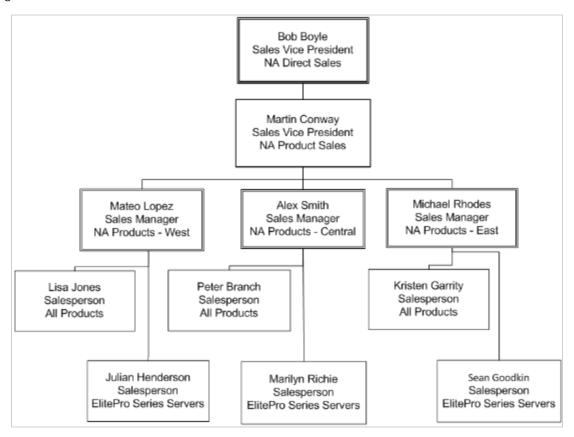
Managers in a salesperson's management hierarchy get automatic visibility to their team's set of accounts and contacts. They do not have to be explicitly assigned to each territory or sales team.

Vision Corporation Use Case

For simplicity, we assume that Vision Corporation sells only to the United States and divides the country into three geographic regions: west, central, and east. Each territory is owned by one sales representative (although you can assign multiple sales people, if required).

Recently, Vision Corporation introduced a new line of servers, called ElitePro. The company is assigning an additional salesperson to handle the new severs in each region. The additional salesperson will work closely with the prime salesperson on managing the accounts.

Here is the organization chart:

Whenever a new account or opportunity is created or updated, Vision Corporation will have the application automatically check the territories to see who needs to be assigned. Here's how the assignment will work:
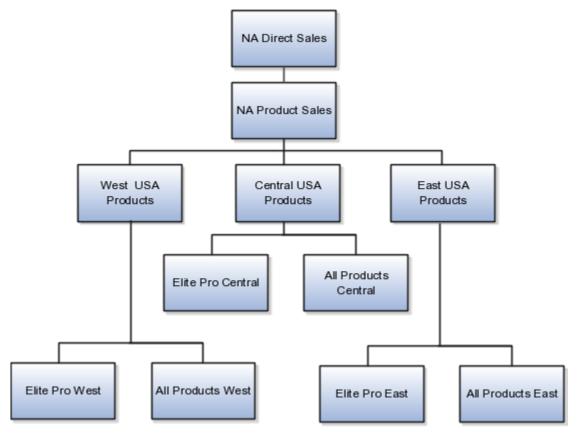
- Based on the state the account is located in, the application assigns the territories of both the prime salesperson and the additional salesperson to each account.

  Assigning both salespeople ensures they can access all the account details they need for close collaboration.

- When an opportunity includes a line item for any of the company's products, including an ElitePro server, the application assigns the prime salesperson's territory to the opportunity.

- When an opportunity line item includes ElitePro servers, the application assigns both the prime salesperson's territory and the additional salesperson's territory to the opportunity.

The following diagram show the sales territory setup. Because Vision Corporation is using territories for forecasting as well, it makes sure that the territory hierarchy mirrors the management hierarchy.

Vision Corporation sets up the sales territories from the top down as described in this chapter. The following table lists the key values for the Vision Corporation territories, which are based on U.S. states and the products in the sales catalog.

Note that:

- The default value **Any** means that any value matches the territory.

- Vision is breaking up the 50 states in the U.S. into three geographical regions.

- The entries in the Product dimension are the product groups in the sales catalog. Selecting a product group includes all the product groups nested within the product group.

Territory Name	Territory Owner	Geography	Product
NA Direct Sales	Bob Boyle	Any	Any
NA Product Sales	Martin Conway	Any	Any
East USA Products	Michael Rhodes	Arkansas and all the other states in the eastern U.S.	Any

ORACLE

Territory Name	Territory Owner	Geography	Product
ElitePro East	Seam Goodkin	Arkansas and all the other states in the eastern U.S.	ElitePro Series
All Products Central	Kristen Garrity	Arkansas and all the other states in the eastern U.S.	Any
Central USA Products	Alex Smith	Illinois and all the other states in the central U.S.	Any
ElitePro Central	Marilyn Richie	Illinois and all the other states in the central U.S.	ElitePro Series
All Products Central	Peter Branch	Illinois and all the other states in the central U.S.	Any
West USA Products	Mateo Lopez	Alaska and all the other states in the western U.S.	Any
ElitePro West	Julian Henderson	Alaska and all the other states in the western U.S.	ElitePro Series
All Products West	Lisa Jones	Alaska and all the other states in the western U.S.	Any

The application matches territories to accounts and opportunities from the bottom of the hierarchy up. For example:

- An account in Illinois gets assigned the ElitePro Central and All Products Central territories
- An opportunity for the Illinois account with an ElitePro server line item gets assigned the ElitePro Central territory.
- An account from Mexico gets assigned the NA Product Sales territory.
- An opportunity for a Mexican account with an ElitePro server line item gets assigned the NA Product Sales territory.

Setup Overview

1. You configure the application for the types of sales territories you plan to create.
    a. If you are setting up territories based on geography, like Vision Corporation, you must enable the geographical elements you plan to use during territory setup for the countries for which you imported geography reference information. Optionally, you can organize the geography elements into zones.

ORACLE®

See Specifying Geography Elements for Territory Setup in this chapter for details.

b. You must enable the territory dimensions you plan to use in your territories.

See Enabling Territory Dimensions for details.

2. You set up the sales territories themselves. This involves:

a. Creating a territory proposal.

A proposal is a sandbox that permits you to update territories without affecting any existing territory setup, so it becomes useful when you want to readjust your territories in the future.

See Creating a Territory Proposal for details.

b. Create the hierarchy of sales territories in the proposal starting with the top territory and working your way down.

See Creating the Sales Territory Hierarchy

c. Activate the proposal.

See Activating the Territory Proposal.

3. You set assignment options.

Assignment behavior is controlled by a set of system profiles. By default, the application

○ Automatically assigns sales territories to accounts whenever an account is created or updated.

○ Assignment of opportunities is manual: salespeople can either trigger the assignment process while editing an individual opportunity or the opportunities are assigned by the Sales Account Assignment Process which you set up to run periodically.

Oracle sets manual assignment for opportunities as the default behavior to prevent performance issues for companies with large number of opportunities (100,000 and up).

If your organization, like Vision Corporation, does not have such a large volume, you can have the application assign the opportunity automatically by setting the profile Assignment Submission at Save Enabled to Yes.

See Making Opportunity Assignment Automatic for details.

4. Turn off deal protection for quoting and incentive compensation to permit immediate opportunity sales team reassignment when you are configuring territories.

When a territory is assigned to an opportunity, the application copies over the territory owners to the opportunity sales team. When you realign territories, the application automatically implements your territory changes but waits 15 days to remove sales people from the opportunity sales teams. This delay permits the original salespeople to receive credit for the deals they are working on.

If you are not implementing quotas and incentive compensation or if you are in the process of setting up territories, you should turn off deal protection by setting the system profile Opportunity Resource Deal Protection Period to 0. By default this profile is set to 15 days. Making this change does not impact forecasting because the salesperson's territory has been removed from the opportunity and no longer is a forecast territory for any revenue line.

See Disabling Deal Protection for details.

5. Run assignment processes:

    ○ Request Sales Account Assignments

    ○ Revenue Territory Territory Batch Assignment

    You should run these processes immediately after you activate your territories and then set them to run on a regular basis, perhaps once a day in off-peak periods, to handle ongoing assignments. Just how frequently you need to run these processes depends on your business needs.

    See Running the Account Assignment Process and Running the Opportunity Assignment Process topics for details.

Preparing to Create Territories

Specifying Geography Elements for Territory Setup

This step is required only if you are creating territories with geography as one of the dimensions. For example, if you are creating territories based on states, you must enable the states for selection during territory creation.

In an earlier step, you imported the reference geography for the countries where you do business. Now you must specify which of those geography elements you want to use in your sales territories. Vision Corporation is creating territories by states, so it will enable states.

Optionally, you can organize the geographies into zones to simplify territory creation. Vision Corporation, in our example, has imported just one country, the US, and plans just three geographical territories: West, Central, and East.

Vision has two options:

- Enable states

    List the states in each territory

- Enable the states and create zones to organize them

    Organize the states in zones, and then select the zone in each territory rather than entering the individual states.
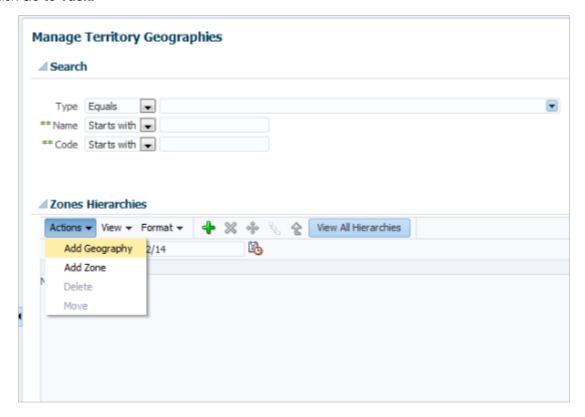
Vision Corporation decides to forego zones and enables states only. When building the territory hierarchy, you copy the existing territories and modify them. The individual states you entered are copied as well.

Specifying Geography Elements for Selection During Territory Setup

1. Navigate to the Setup and Maintenance work area and search for the Manage Territory Geographies task.

ORACLE®

2. Click **Go to Task.**

Manage Territory Geographies

◢ **Search**

Type	Equals ▾	▾
** Name	Starts with ▾	
** Code	Starts with ▾	

◢ **Zones Hierarchies**

Actions ▾   View ▾   Format ▾   ➕   ✖   ✛   ⬚   ⬆ | View All Hierarchies |

| Add Geography | 2/14 |
| Add Zone |
| Delete |
| Move |

3. In the Manage Territory Geographies page, Zones Hierarchies region, select **Add Geography** from the Actions menu.
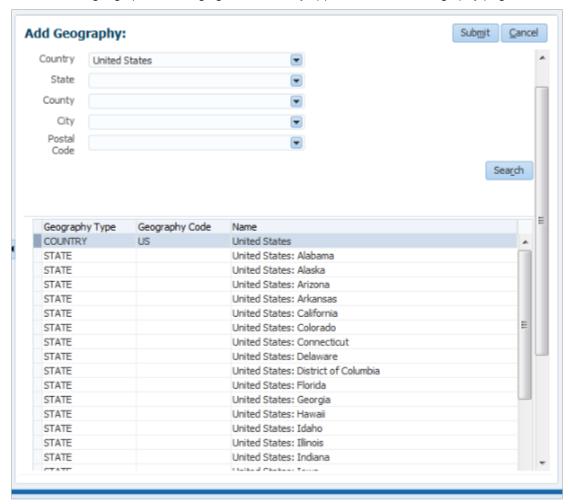
The Add Geography page appears.

Add Geography:

◢ **Select Geography**

Country [▾]

Search...

Geography Type	Geography Code	Name
No search conducted.		
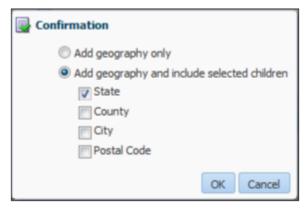
4. From the Country list, select **Search**.

ORACLE®

5. In the Search and Select Country window, search for the country, select it, and click **OK**.

6. Click **Search**. The geographies belonging to the country appear in the Add Geography page.

7. Select the country and click **Submit**.

8. In the confirmation box, select **Add geography and include selected children**.

9. Select the geography elements you want to use in territories. For Vision Corporations, this is **State**.

ORACLE

10. Click **OK**.

11. Click **OK** again in the batch process confirmation box.

12. Click **OK**.
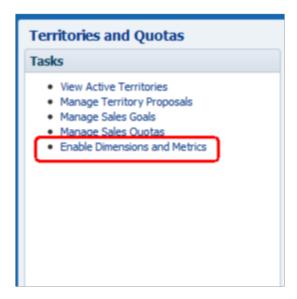
Enabling Sales Territory Dimensions

You must enable the territory dimensions that you will use to create your sales territories.

Make sure you have all the source data available before you start. Vision Corporation plans to enable the Product and Geography dimensions, so it has completed sales catalog and territory geography setup.

Enabling Sales Territory Dimensions

1. Sign in as a setup user or sales administrator.

2. Navigate to Territories and Quotas.

3. In the Tasks list, select **Enable Dimensions and Metrics**.
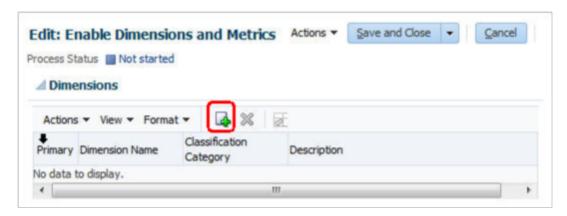
The Enable Dimensions and Metrics page appears.

4. Click **Edit**.

ORACLE
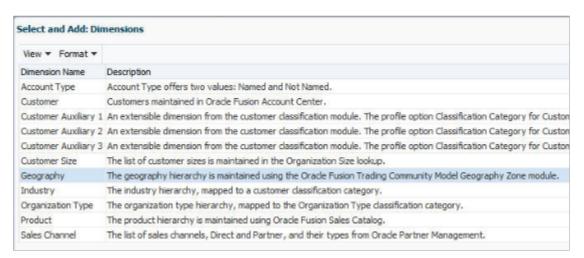
The Edit: Enable Dimensions and Metrics page appears.

5. In the Dimensions table, click **Select and Add**.

The Select and Add: Dimensions window appears.
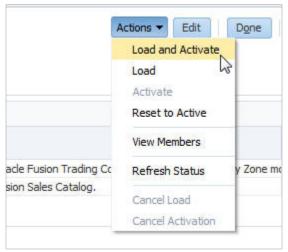
6. Select the dimensions that you want to use and click **OK**. Vision Corporation adds **Geography** and **Product**.

7. Click **Save and Close**.

ORACLE®

8. From the Actions menu, select **Load and Activate** .

When the process completes successfully, you can start defining territories in the application.

For more information about enabling dimensions, see the Define Territory Management Configuration chapter in the Oracle Sales Cloud Implementing Sales guide.

Creating the Sales Territory Hierarchy

Creating a Territory Proposal

Use this procedure to create a territory proposal. A territory proposal is the sandbox where you will create the sales territory hierarchy.

Creating the Territory Proposal

1. Sign in as a setup user or sales administrator.
2. Navigate to **Territories and Quotas**.
3. In the Tasks region, select the **Manage Territory Proposals** link.
   The Manage Territory Proposals page appears.
4. In the Current Territory Proposals region, click **Create.**
   The Create Territory Proposal window appears.

ORACLE

5. Enter a name for the proposal.

6. Leave the **Activation Date**field blank. This will cause the proposal to be activated immediately after you build your territories and activate it.
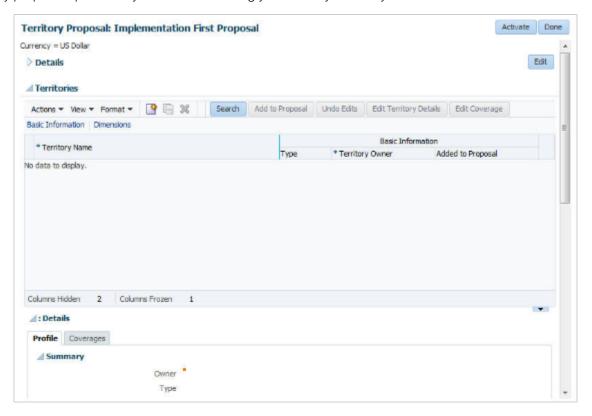
> ✎ **Note**
>
> Entering an activation date requires you to run the Run Territory Proposal Activation process, not covered here.

7. Click **Save and View**.

Your territory proposal opens and you can start building your territory hierarchy.

Creating the Sales Territory Hierarchy

Create the sales territory hierarchy starting with the top territory in the hierarchy.
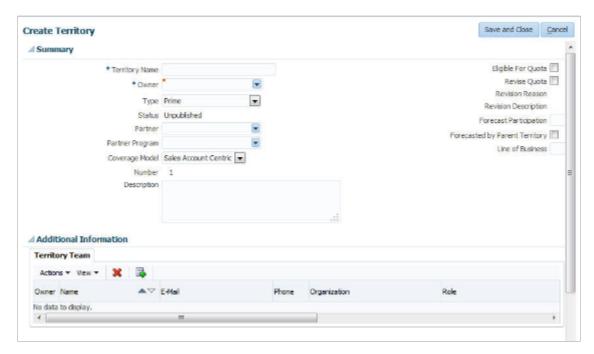
For each territory you create, you enter the name of the salesperson or manager who owns the territory and the values for the dimensions that form the territory boundaries. When you create the territories, the application automatically copies all the dimension values from the parent territories to the child territories to speed up entry.

Creating the Top of the Hierarchy
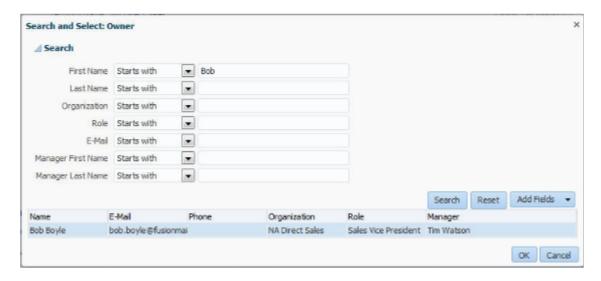
1. In the Territories region of your territory proposal, click **Create.**

ORACLE

The Create Territory page appears.
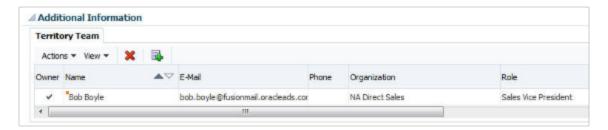
2. Enter the territory name, for example, NA Direct Sales.

3. Select an owner for the top territory, most likely the VP of Sales:

   a. From the **Owner** list, select **Search**

   b. Search for the resource name using any of the criteria.

   c. Select the name and click **OK**.
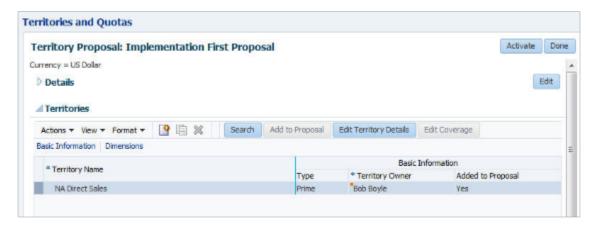
The owner appears on the Territory Team tab. You can add additional members to the team, and the owner himself can add members later.

4. From the **Forecast Participation** list, select **Revenue and nonrevenue**. This setting enables the territory to be used for forecasting.

5. Click **Save and Close**.

    Your new territory appears in the Territories table of your proposal.

6. Select the Coverages tab in the Details region at the bottom of the page.

    Note

    If the Coverages tab is blank, then your territory configuration is incomplete. Navigate to Scheduled Processes and check to see if the Synchronize Stage Environment process completed successfully. See Enabling Territory Dimensions topic for more information.

7. In the Dimensional Coverage table, click **Add**.

ORACLE

The enabled dimensions appear. Every enabled dimension is represented by a column, and each column shows Any. For the Vision Corporation example, this entry means that sales accounts in any location and for any product are assigned to this territory. This is the setting you want for your top territory.

Adding the Rest of the Hierarchy
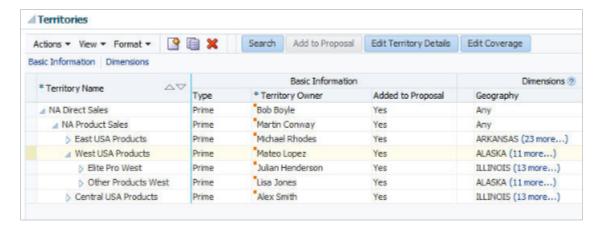
1. In Manage Territory Proposals page, select the name of your proposal.

   The territory proposal opens for editing.

2. If you are creating a subordinate territory, then:

   a. Select the parent territory.

   b. From the Actions menu, select **Create Child**.

3. If you are creating a territory at the same level as an existing territory, then:

   a. Select the territory you want to duplicate.

   b. From the Actions menu, select **Duplicate**.

   The application creates a new territory and copies all of the existing coverage values.

4. Enter the territory name.

5. Select the owner for the territory.

6. Click **Save and Close**.

7. Click **Edit Coverage.**

8. Select the members for each dimension that you want to change. For details, see Defining the Territory Coverage in this chapter.

9. If you need to make changes to an existing territory that was not added to the proposal, then select it and click **Add to Proposal** and make your changes.

ORACLE®

10. Click **Save and Close**.

Territories				
Actions ▼ View ▼ Format ▼ 📄 📋 ✖ Search Add to Proposal Edit Territory Details Edit Coverage				
Basic Information Dimensions				
* Territory Name △▽	Basic Information			Dimensions ⓘ
	Type	* Territory Owner	Added to Proposal	Geography
⊿ NA Direct Sales	Prime	Bob Boyle	Yes	Any
⊿ NA Product Sales	Prime	Martin Conway	Yes	Any
▷ East USA Products	Prime	Michael Rhodes	Yes	ARKANSAS (23 more...)
⊿ West USA Products	Prime	Mateo Lopez	Yes	ALASKA (11 more...)
▷ Elite Pro West	Prime	Julian Henderson	Yes	ILLINOIS (13 more...)
▷ Other Products West	Prime	Lisa Jones	Yes	ALASKA (11 more...)
▷ Central USA Products	Prime	Alex Smith	Yes	ILLINOIS (13 more...)

Defining the Territory Coverage

Perform the following steps to change the territory coverage of a territory. Any new territory defaults to the coverage of the parent territory.

1. In Manage Territory Proposals page, select the name of your proposal.

   The proposal opens for viewing.
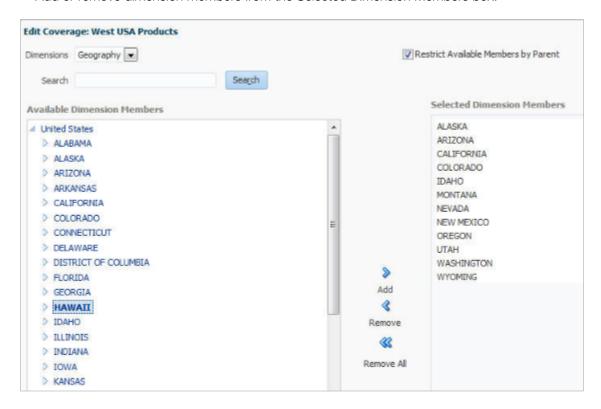
2. In the Territories table, select the territory you want to change.

3. Click **Edit Coverage**.

   The Edit Coverage window appears.

4. For every dimension you want to change:

   a. Select the dimension from the **Dimensions** list.

ORACLE®

b. Add or remove dimension members from the Selected Dimension Members box.

For example, to specify the states in Vision Corp.'s West USA Products territory, you would move the following states to the Selected Dimension Members box:

- Alaska

- Arizona

- California

- Colorado

- Idaho

- Montana

- Nevada

- New Mexico

- Oregon

- Utah

- Washington

- Wyoming

c. Click **Save and Close**.
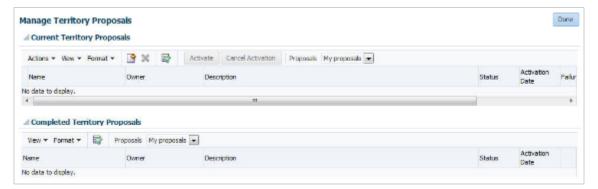
Activating the Territory Proposal

When you have completed building your territory hierarchy, use this procedure to activate the territory proposal and start using the new territories for assignment.
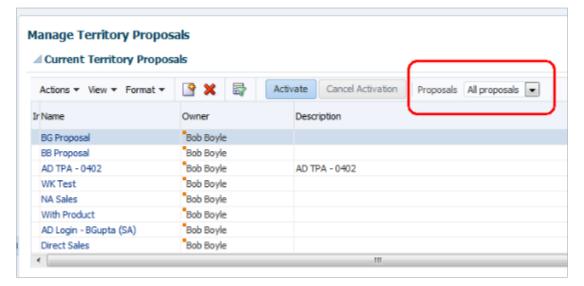
Activating the Territory Proposal

1. Sign in as a setup user or sales administrator.

2. Navigate to **Territories and Quotas**.

3. In the Tasks region, click **Manage Territory Proposals**.

   The Manage Territory Proposals page appears.

4. If the proposal you want to activate doesn't appear in the Current Territory Proposals table, select **All Proposals** from the **Proposals** list.

ORACLE

5. Select the proposal and click **Activate**.

   The application displays the new territories in the View Active Territories page.
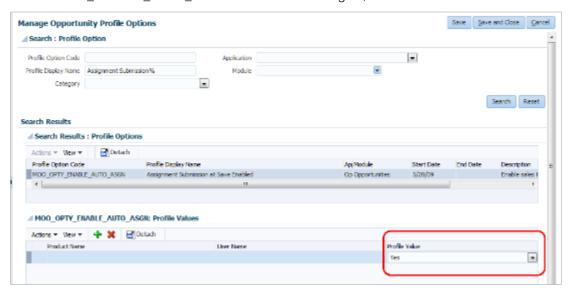
Setting Assignment Options

Making Opportunity Assignment Automatic

By default, sales users must assign opportunities manually when they edit each opportunity. You can make the assignment of opportunities automatic by setting the system profile Assignment Submission at Save Enabled.

Making Opportunity Assignment Automatic

1. Sign in as a sales administrator or setup user.

2. Navigate to **Setup and Maintenance** and search for the Manage Opportunity Profile Options task.

3. Click the **Go to Task**.

   The Manage Opportunity Profile Options page appears.

4. In the Search region, enter Assignment Submission at Save Enabled in the **Profile Display Name** field.

5. In the MOO-OPTY_ENABLE_AUTO_ASSIGN: Profile Values region, select **Yes** from the **Profile Value** list.

6. Click **Save and Close**.

Disabling Deal Protection on Opportunities

When a sales territory is assigned to an opportunity, the application copies over the territory resources to the opportunity sales team. By default, the application retains the salespeople on the opportunity sales team for a period of 15 days after
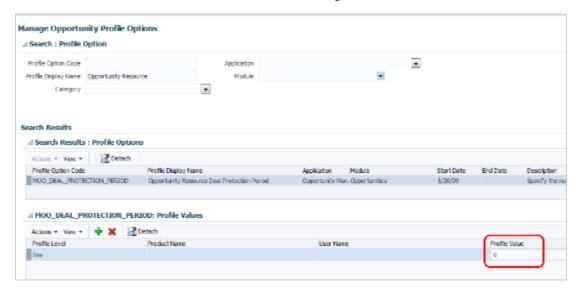
territory realignment. Use this procedure to disable this feature by setting the system profile Opportunity Resource Deal Protection Period to 0.

Disabling Deal Protection

1. Sign in as a sales administrator or setup user.

2. Navigate to **Setup and Maintenance** and search for the Manage Opportunity Profile Options task.

3. Click the **Go to Task** icon.

   The Manage Opportunity Profile Options page appears.

4. In the Search region, enter Opportunity Resource in the **Profile Display Name** field.

5. In the MOO_DEAL_PROTECTION_PERIOD: Profile Values region, enter 0 in the **Profile Value** field.

6. Click **Save and Close**.

Running Assignment Processes

Running the Account Assignment Process
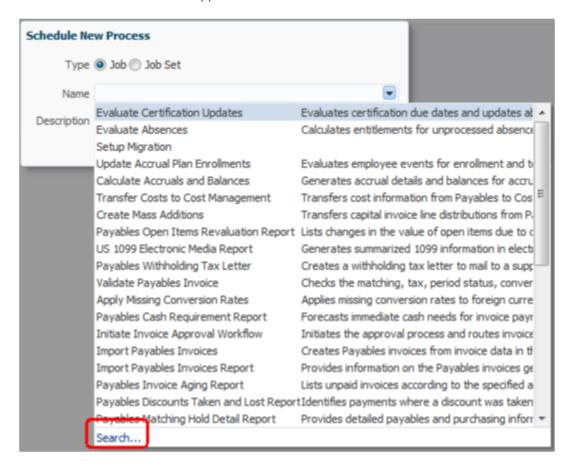
You must run the Request Sales Account Assignments process to assign territories to accounts after you activate a territory proposal and then set it run on a regular basis to ensure that all territories are assigned properly.

Running the Request Sales Account Assignment Process

1. Navigate to the Scheduled Processes work area.

2. On the Overview page, click **Schedule New Process**.

The Schedule New Process window appears.

Schedule New Process

Type	● Job ○ Job Set
Name	
Description	

Evaluate Certification Updates	Evaluates certification due dates and updates al
Evaluate Absences	Calculates entitlements for unprocessed absence
Setup Migration	
Update Accrual Plan Enrollments	Evaluates employee events for enrollment and t
Calculate Accruals and Balances	Generates accrual details and balances for accru
Transfer Costs to Cost Management	Transfers cost information from Payables to Cos
Create Mass Additions	Transfers capital invoice line distributions from P
Payables Open Items Revaluation Report	Lists changes in the value of open items due to
US 1099 Electronic Media Report	Generates summarized 1099 information in elect
Payables Withholding Tax Letter	Creates a withholding tax letter to mail to a supp
Validate Payables Invoice	Checks the matching, tax, period status, conver
Apply Missing Conversion Rates	Applies missing conversion rates to foreign curre
Payables Cash Requirement Report	Forecasts immediate cash needs for invoice payr
Initiate Invoice Approval Workflow	Initiates the approval process and routes invoice
Import Payables Invoices	Creates Payables invoices from invoice data in th
Import Payables Invoices Report	Provides information on the Payables invoices ge
Payables Invoice Aging Report	Lists unpaid invoices according to the specified a
Payables Discounts Taken and Lost Report	Identifies payments where a discount was taken
Payables Matching Hold Detail Report	Provides detailed payables and purchasing infor

Search...

3. Click the down arrow to the right of the **Name** field and select the **Search...** link.

ORACLE®

The **Search and Select: Name** window appears.
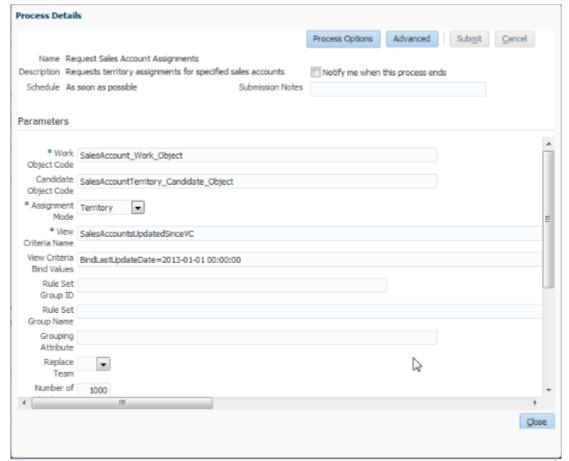
4. Enter Request Sales Account Assignments in the **Name** field and click **Search**.

5. Select the name below and click **OK**.

    You are returned to the Schedule New Process window.

6. Click **OK**.

ORACLE

The Process Details page appears.

7. Make the following entries:

Field	Entry
Work Object Code	Enter SalesAccount_ Work_Object.
Candidate Object Code	Enter SalesAccountTerritory_ Candidate_ Object.
Assignment Mode	Select **Territory** from the list.
View Criteria Name	Enter SalesAccountsUpdatedSinceVC.
View Criteria Bind Values	Enter the date you started implementing the application to ensure you are assigning all the records, in the format: BindLastUpdateDate= YYYY-MM-DD HH:MM:SS. For example: BindLastUpdateDate= 2012-01-01 00: 00:00

ORACLE
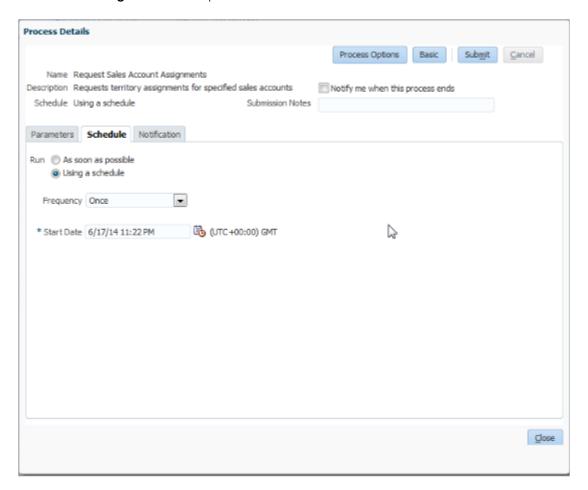
> **Note**
>
> You can find additional information on the available process parameters in the Sales Account Assignment Process Parameters (1507365.1) document on support.oracle.com.

8. If you want to run this process on a regular basis, then:

   a. Click **Advanced**.

   b. Select the Schedule tab.

   c. Select the **Using a schedule** option.

   d. Select the frequency and start date.

9. Click **Submit**.

10. Unless you specified a schedule, your process runs immediately. You can monitor its progress by searching for the process by name on the Overview page.

ORACLE®

> **Note**
>
> For information on troubleshooting see the CRM Assignment Troubleshooting Guide (1389342.1) on my.oracle.support.com.
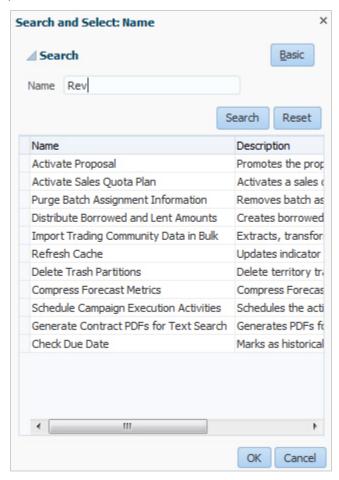
Running the Assignment Process for Opportunities

You must run the Revenue Territory Territory Based Assignment process to assign territories to opportunities after you activate a territory proposal and then set it run on a regular basis to ensure that all territories are assigned properly.

Just how frequently and when you need to run this process depends on such factors as your opportunity volume and the sales cycle.
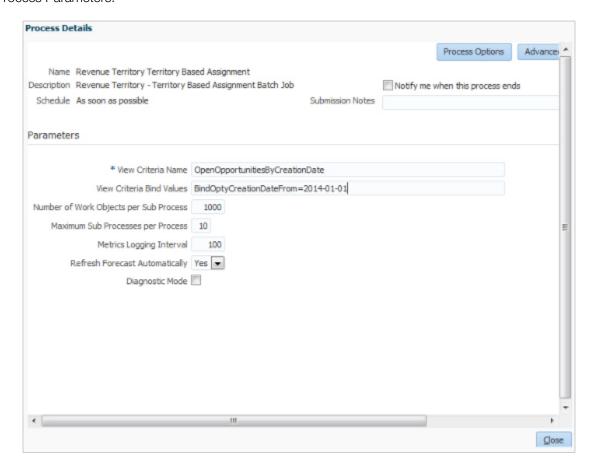
Running the Assignment Process

1. While signed in as a sales administrator, select **Scheduled Processes** in the **Tools** group in the Navigator.

2. In the Scheduled Processes page, click **Schedule New Process**.

3. In the Schedule New Process dialog, select the **Name** list and then select the **Search** link.

4. In the Search and Select dialog, enter the process name Revenue Territory Based Assignment, and click **Search**. You can search by a partial name, but note that the search is case sensitive.

5. Select the process name in the results and click **OK**.

6. Click **OK** again if needed to dismiss the dialog.

7. The Process Details window appears, where you enter parameters using the steps in the following section, Entering Process Parameters.

8. Make the following entries:

Field	Entry
View Criteria Name	Enter OpenOpportunitiesByCreationDate.
View Criteria Bind Values	You can have the option of assigning territories to those open opportunities created since a certain date or those created for a range of dates: o For a specific date, enter BindOptyCreationDateFrom=YYYY-MM-DD where YYYY-MM-DD is the date you started implementing the application. For example, BindOptyCreationDateFrom=2014-01-01 assigns all open opportunities created since January 1, 2014.

Field	Entry
	○ To use a date range, enter BindOptyCreationDateFrom=<date>, BindOptyCreationDateTo=<date>. Note that the From and To values are separated by a comma.

Note

You can find more information on the process parameters in application help, by searching on Revenue Territory Territory Based Assignment Process. Or, you can view article Opportunity Assignment Process Parameters (1507365.1) available on support.oracle.com.

9. To run this process on a regular basis, then:

   a. Click **Advanced**.

   b. Select the Schedule tab.

   c. Select the **Using a schedule** option.

   d. Select the frequency and start date.

10. Click **Submit**.

11. Unless you specified a schedule, your process runs immediately. You can monitor its progress by searching for the process by name on the Overview page.

ORACLE®

15 Configuring Opportunity Behavior

About Configuring Opportunity Behavior

After you set up the required functionality described prior to this chapter, the opportunity application is ready for use with default behavior. However, you might want to configure some functionality, including:

- Configuring sales methods and sales stages: Sales methods and sales stages mark the progress of an opportunity from start to close. A few sales methods, with supplied sales stages, are provided for use in opportunities. The supplied Standard Sales Process works without any additional setups required. However, you can customize sales methods. For example, you might want to add stages to a supplied sales method or even create new sales methods. For more information, see the section in this chapter, Configuring Sales Methods.

- Configuring how opportunities are closed: The ability to close an opportunity using a dedicated close page and required fields is enabled by default. However, you can turn off the close page and control which fields are required. For more information, see the section in this chapter, Configuring Opportunity Close Behavior.

Configuring Sales Methods

About Opportunity Sales Methods

A company's sales methodology is its formalized approach toward achieving a sale. In opportunities, you can employ your company's sales methodology using a sales method that is automatically associated with the opportunity when it is created. The sales method contains several sales stages that progress as the opportunity matures.

Several sales methods and stages are supplied with the application. You can use the supplied sales methods and stages as shipped, modify them to suit your business needs, or create new ones.

You can specify the default sales method using the profile option, Sales Method Default. Setting the profile option is discussed in the topic, Setting Default Sales Method Profile Option.

While editing an opportunity, salespeople can change the sales method and sales stage, if needed.

For information on creating new sales methods or editing existing ones, see the topic, Configuring Sales Methods.

Configuring Sales Methods

You can create and edit sales methods and their stages by following the procedures in this topic.

Note: This topic does not cover setting up the elements of the Sales Coach. For information on setting up sales coach, see the videos, Setting Up Sales Coach, parts 1 and 2, available in the online help.

You can find more information on sales methods and Sales Coach in the online help and in the guide, Oracle Sales Cloud - Using Sales.

Creating or Editing Sales Methods
Use the following procedure to create new or modify existing sales methods.

1. As a user with access to the sales methods pages, such as the sales administrator or a setup user, navigate to **Setup and Maintenance**.

ORACLE®

2. Search for the task, Manage Sales Methods and Sales Stages, and click the **Go to Task** icon on the task to retrieve the Manage Sales Methods page.

3. If you want to create a sales method: In the Manage Sales Methods page, click the **Create** icon.

4. If you want to edit a sales method: In the Manage Sales Methods page, drill down on the sales method, or select the row showing the sales method and click the **Edit** icon.

5. In the Create Sales Method or Edit Sales Method page, fill in the required information. The following are the more complex attributes of sales methods:

   ◦ **Set**: A set represents a group of business units. The Set field allows the sales method to be shared across multiple business units. Select the Common Set, unless you are aware that a different set should be selected.

   ◦ **Close Window**: Set in days, the Close Window value is added to the current date to set the initial opportunity close date. If not set, the application retrieves the default close window from the Opportunity Close Date Default profile option.

   ◦ **Disable**: The Disable check box lets you disable the sales method. Only disable sales methods during implementation and not after the methods are in use in current opportunities.

6. Add new or modify existing sales stages as described in the following section, Creating or Editing Sales Stages.

7. Save your changes.

Creating or Editing Sales Stages

Use the following procedure to create new or modify existing sales stages.

1. As a user with access to the sales methods pages, such as the sales administrator or as a setup user, navigate to **Setup and Maintenance**.

2. Search for the task, Manage Sales Methods and Sales Stages, and click the **Go to Task** icon on the task to retrieve the Manage Sales Methods page.

3. Drill into the sales method whose sales stages you want to customize. The Edit Sales Method page appears.

4. To add another sales stage to the sales method: In the Edit Sales Method page, click the **Create** icon and fill out the required information in the Create Sales Stage page.

5. To edit a sales stage: In the Edit Sales Method page, drill down on the sales stage, or select the row and click the **Edit** icon. Fill out the required information in the Edit Sales Stage page.

6. Following are the more complex attributes of sales stages:

   ◦ **Quota Factor**: This field feeds the data in the sales Pipeline report. Quota factor is the number that a salesperson's quota must be multiplied by to meet his revenue targets at this sales stage. Enter a 3, for example, to indicate that a salesperson needs three times the amount of deals to meet his revenue targets at this sales stage.

   ◦ **Disable**: This check box lets you disable the sales stage. Only disable sales stages during implementation and not after the stages are in use in current opportunities.

   ◦ **Win Probability**: This field represents the likelihood (in percent form) of winning the opportunity. This Win Probability field sets the default win probability at opportunity level for the sales stage. If you don't want your sales stages to control opportunity win probability, make sure they are null by blanking out any value in this field.

- ○ **Duration**: This field signifies the average number of days that you expect this sales stage to last. For example, you would enter 30 if you think this sales stage will last about 30 days.

- ○ **Stalled Deal Limit**: This field signifies the number of days after which an opportunity in this sales stage would be considered stalled. This field drives metrics for the Stalled Opportunities report.

7. Save your changes.

Related Topics

- Sales Stages: Explained

- Managing Sales Methods and Stages

- Setting Up Sales Coach, Part 1

- Setting Up Sales Coach, Part 2

Setting Default Sales Method Profile Option

You can specify the sales method set on an opportunity when it is initially created by setting the profile option, Sales Method Default. Use the following procedure to set the default sales method profile option.

1. As a user with access to the profile option screens, such as the sales administrator or a setup user, navigate to **Setup and Maintenance**.

2. Search for the task, Manage Opportunity Profile Options, and click the **Go to Task** icon for the task. The Manage Opportunity Profile Options page appears.

3. In the search region, select **Opportunity Management** as the application, or just enter the profile option Sales Method Default directly in the **Profile Display Name** field.

4. In the list that is returned, click on the profile option to retrieve the details about the profile option.

5. Set the profile option to the sales method that will be the default for newly created opportunities.

> **Note**
> Opportunity and revenue reports and analytics, such as the Pipeline report, are designed to work with the supplied sales method Standard Sales Process. If you use a sales method other than this one as the default sales method, you 'll need to customize reports to uptake the other sales method.

Configuring Opportunity Close Behavior

About Setting Up Opportunity Closing

Salespeople close an opportunity when the deal is either won, lost, or abandoned for some reason. The ability to close an opportunity is always available. You have the following configuration options:

- Enable or disable the Close Opportunity action in the Edit Opportunity page and the subsequent Close Opportunity page that appears after a user selects the Close Opportunity action in the Edit Opportunity page.

- Make it required or optional to enter a win/loss reason in the Close Opportunity page or in the Edit Opportunity page.

- Make it required or optional to enter a competitor in the Close Opportunity page or in the Edit Opportunity page.

- Set the default number of days to the opportunity close date.

Each of these options is controlled by profile options described in the topic Setting Close Opportunity Profile Options.

> **Note**
> Even if you have not enabled the Close Opportunity action or Close Opportunity page, users can still close an opportunity by selecting a closed status and saving the opportunity. If you have set the profile options to require a win/loss reason or a competitor, users will still be required to enter them, regardless whether you have enabled the Close Opportunity page.

Related Topics

- Closing an Opportunity: Explained

- Setting Initial Opportunity Assignment Profile Options

Setting Close Opportunity Profile Options

Using profile options discussed in this topic, you can configure close opportunity behavior. For more information on the configuration options, see the topic, About Closing Opportunities.

Close Opportunity Profile Options

The following table shows the profile options that control opportunity close behavior.

Profile Option Display Name	Default Value	Effect
Close Opportunity Flow Enabled	Yes	Determines whether the close opportunity flow is enabled. A Yes value enables the Close Opportunity action in the edit opportunity UI, as well as the subsequent close opportunity summary screen. A No value still allows the user to close an opportunity by setting the status to a closed status category.
Close Opportunity Win/Loss Reason Requirement	Yes	Determines whether, when closing an opportunity, the user is required to enter a win/loss reason. Applies both at the opportunity and revenue item levels. Effective regardless of the setting of the Close Opportunity Flow Enabled profile option.

ORACLE

Profile Option Display Name	Default Value	Effect
Close Opportunity Competitor Requirement	Yes	Determines whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels. Effective regardless of the setting of the Close Opportunity Flow Enabled profile option.
Opportunity Close Date Default	20	Determines the number of days after an opportunity is created for the initial close date.

Setting Close Opportunity Profile Options

Use the procedure below to find and set the close opportunity profile options.

1. As a user with access to the profile option screens, such as the sales administrator or the setup user you created earlier in this guide, navigate to **Setup and Maintenance**.

2. Search for the task, Manage Opportunity Profile Options, and click the **Go to Task** icon. The Manage Opportunity Profile Options page appears.

3. In the search region, select **Opportunity Management** as the application, or just enter the profile option name directly in the **Profile Display Name** field.

4. In the list that is returned, click on the profile option to retrieve the details about the profile option.

5. Set the profile option value as needed.

ORACLE®

16 Setting Up Forecasting

About Setting Up Forecasting

Set forecast options to enable forecasts for all users. You must define the forecast periods and due dates for your organization. Forecast criteria determine the opportunity line items that get automatically added to a territory forecast.

Prerequisites

Before you can set up the forecasting periods and due dates, you must complete the following steps:

- Your selected calendar and the period definition for that calendar determine the adjustment period for the forecast. For Vision, it is a calendar month. See Creating the Accounting Calendar in the Setting Up Calendar and Currencies chapter.

- You created your territory hierarchy as described in the Defining Sales Territories chapter. Forecasts are generated by territory and roll up the territory hierarchy. The owner of a territory submits a forecast to the owner of the parent territory.

Setup Overview

Perform the following tasks to set up forecasting:

1. Select forecast period parameters. See Creating a Forecast in this chapter.

2. Review the scheduled forecast dates and modify as needed.

3. Set the criteria for automatically adding opportunity line items to the forecast. See Creating a Forecast.

4. Schedule forecast processes to run daily. See Generating Your Forecasts in this chapter.

Creating a Forecast

Start the forecasting process by creating your forecast for the year and defining forecasting periods.

Prerequisites

Before you can begin forecasting, you must have a territory hierarchy. Forecasts accumulate by territory and then roll up the established territory hierarchy.

Your accounting calendar must be set up, and you need to be familiar with the period frequency defined in the calendar. The period frequency is called Fiscal period in forecasting options. For a discussion of how time period frequency settings and time period dates affect your forecast time periods, see Creating the Accounting Calendar in the Setting Up Calendar and Currencies chapter.
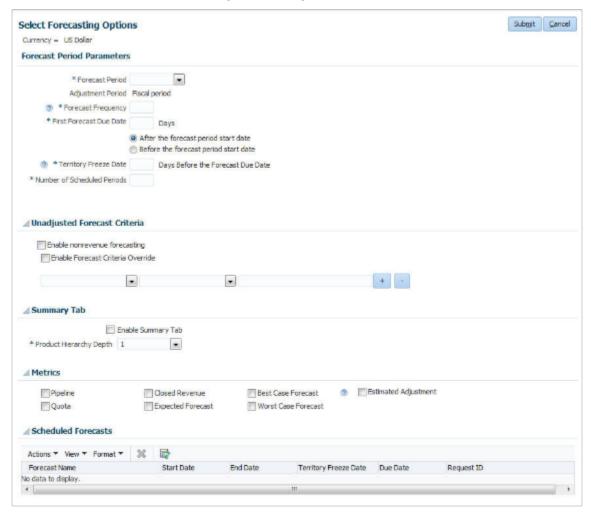
Selecting Options to Create the Forecast

Perform the following steps to select sales forecasting options:

1. Sign in as a setup user or sales administrator.

ORACLE

2. In Setup and Maintenance, search for Select Forecasting Options.

3. Click **Go to Task.** The Select Forecasting Options page appears.

4. Set the options to generate your forecast. Following are the settings for Vision Corporation, which sets quarterly forecasts that salespeople update monthly:

   ○ Forecast Period: Quarter

   ○ Adjustment Period is always the fiscal period. This is the time period you set in the Period Frequency field when you created your calendar. Vision Corporation is set to month. Therefore Vision salespeople can make adjustments to each of their monthly forecast amounts.

   ○ Forecast Frequency: 6
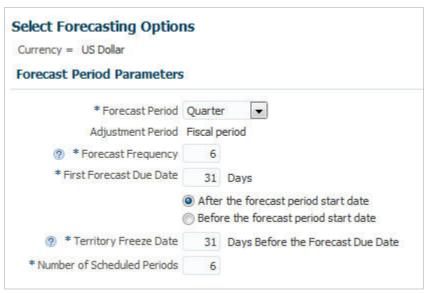
   To allow salespeople to forecast both the current quarter and next quarter every month, the frequency is set to 6 instead of three.

   ○ First Forecast Due Date: 31 Days after the period start date

   ○ Territory Freeze Date: 31 Days before the forecast due date
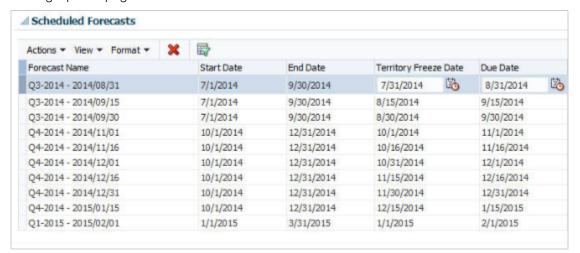
- ◦ Number of Scheduled Periods: 6

  The number of scheduled periods determines how far in advance the forecast schedule will extend measured in terms of the forecast period. If a period is quarterly, and the number of scheduled periods is four, then the system will generate forecasts for the year.

  Select Forecasting Options

  Currency = US Dollar

  Forecast Period Parameters

* Forecast Period	Quarter ▾
Adjustment Period	Fiscal period
⑦ * Forecast Frequency	6
* First Forecast Due Date	31 Days
	⦿ After the forecast period start date
	◯ Before the forecast period start date
⑦ * Territory Freeze Date	31 Days Before the Forecast Due Date
* Number of Scheduled Periods	6

5. Click **Submit**.

6. Select **Delete current and future scheduled forecasts**.

7. If you see a warning message about deleting current and future forecasts, then click **Yes**.

8. Click **Yes** to continue after you review the sample dates.

9. Click **Yes** on the confirmation message that the process was submitted. You will return to Setup and Maintenance.

10. Click **Go to Task** for Select Forecasting Options.

11. When the process is completed, the generated forecasts appear in the Scheduled Forecasts table in the Select Forecasting Options page.

Scheduled Forecasts

Actions ▾ View ▾ Format ▾ ✖ 📄

Forecast Name	Start Date	End Date	Territory Freeze Date	Due Date
Q3-2014 - 2014/08/31	7/1/2014	9/30/2014	7/31/2014	8/31/2014
Q3-2014 - 2014/09/15	7/1/2014	9/30/2014	8/15/2014	9/15/2014
Q3-2014 - 2014/09/30	7/1/2014	9/30/2014	8/30/2014	9/30/2014
Q4-2014 - 2014/11/01	10/1/2014	12/31/2014	10/1/2014	11/1/2014
Q4-2014 - 2014/11/16	10/1/2014	12/31/2014	10/16/2014	11/16/2014
Q4-2014 - 2014/12/01	10/1/2014	12/31/2014	10/31/2014	12/1/2014
Q4-2014 - 2014/12/16	10/1/2014	12/31/2014	11/15/2014	12/16/2014
Q4-2014 - 2014/12/31	10/1/2014	12/31/2014	11/30/2014	12/31/2014
Q4-2014 - 2015/01/15	10/1/2014	12/31/2014	12/15/2014	1/15/2015
Q1-2015 - 2015/02/01	1/1/2015	3/31/2015	1/1/2015	2/1/2015

ORACLE®

> **Note**
>
> When you schedule forecasts, the forecast quarter you are in will not have all six forecasts generated. The first quarter will have a prorated number of forecasts scheduled, depending on where you are in that quarter.

12. Because with the forecast frequency of 6 salespeople can change the forecast for a quarter (for example quarter 4) three times during quarter 3 and three times during quarter 4, you must manually change the generated territory freeze dates and due dates. The first date for July can't be July 1 because this example forecast was generated in July. Today is therefore the territory freeze date for July in quarter 3 and quarter 4, as shown in this image.

▲ Scheduled Forecasts				
Actions ▾ View ▾ Format ▾ ✖ 📋				
Forecast Name	**Start Date**	**End Date**	**Territory Freeze Date**	**Due Date**
Q3-2014 - 2014/08/31	7/1/2014	9/30/2014	7/24/2014 📋	7/31/2014 📋
Q3-2014 - 2014/09/15	7/1/2014	9/30/2014	8/1/2014	8/31/2014
Q3-2014 - 2014/09/30	7/1/2014	9/30/2014	9/1/2014	9/30/2014
Q4-2014 - 2014/11/01	10/1/2014	12/31/2014	7/24/2014	7/31/2014
Q4-2014 - 2014/11/16	10/1/2014	12/31/2014	8/1/2014	8/31/2014
Q4-2014 - 2014/12/01	10/1/2014	12/31/2014	9/1/2014	9/30/2014
Q4-2014 - 2014/12/16	10/1/2014	12/31/2014	10/1/2014	10/31/2014
Q4-2014 - 2014/12/31	10/1/2014	12/31/2014	11/1/2014	11/30/2014
Q4-2014 - 2015/01/15	10/1/2014	12/31/2014	12/1/2014	12/31/2014
Q1-2015 - 2015/02/01	1/1/2015	3/31/2015	10/1/2014	10/31/2014

13. Make sure the due dates are the same as the dates that the VP of Sales typically requires all forecasts to be submitted. For Vision Corporation, this is the first of each month. You can manually change dates whenever needed.

14. Also make sure the freeze date for the next forecast is at least one day after the due date of the current forecast. This allows time for processes to run that generate the next forecast before salespeople start making changes to it.
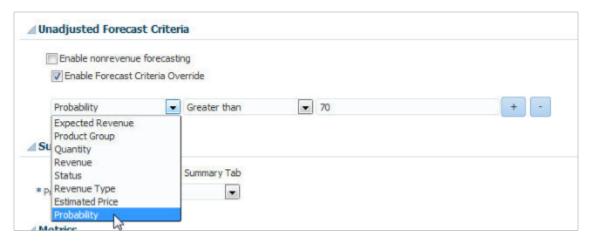
Setting Forecast Criteria

Opportunity revenue lines are automatically added to the forecast when they fit the unadjusted forecast criteria, and have a close date within a forecasting period. Perform the following steps to set the criteria for this forecast:

1. In the Unadjusted Forecast Criteria region of the Select Forecasting Options page, select one criterion you want to use. Vision Corporation selects **Probability**.

2. Select the operator. Vision uses **Greater Than**.

ORACLE

3. Enter the value for the criteria. Vision Corporation wants to include all revenue items that have a win probability greater than 70 percent. Enter 70.

4. Deselect **Enable Forecast Criteria Override**. If it is selected, then salespeople can manually add items to the forecast that do not fit the unadjusted forecast criteria.

5. Click **Submit**.

For more information about forecasting options, see the Define Sales Forecasting Configuration chapter of the Oracle Sales Cloud Implementing Sales guide.

Enable Forecasting by Product

Enable the Summary tab if salespeople want to forecast by product.

Enable Metrics

Enable the Pipeline and Quota metrics.

Generating Your Forecasts

After you submit forecasting options, you need to schedule the following processes to run periodically: Run processes to generate the dates for each forecast time period. Set processes to run periodically to add the latest opportunity line item amounts to the correct forecast time period for the correct territory.

- Refresh Forecast process

  This process updates current and future forecasts using the latest opportunity data. It also updates the forecast territory hierarchy from the latest active territories. Between the territory freeze date and the forecast due date, the forecast territory hierarchy remains frozen. Run this process once prior to the territory freeze date for each forecast period.

- Refresh Forecast Items process

  Opportunities constantly change. This process quickly refreshes forecast items for current and future forecasts. It should be run every night after midnight.

- Due Date Check process

This short process archives forecasts that are now past their due dates. It should be run every night after midnight.

- Refresh Forecast Metrics process

  This process calculates the enabled metrics from the latest source data. It should be run every night after midnight.

Scheduling Forecasting Processes

Perform the following steps to schedule and run forecasting processes:
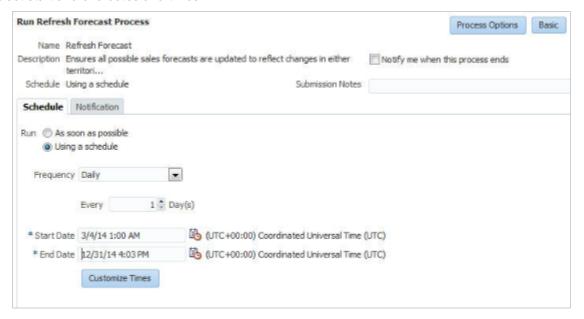
1. Sign in as a setup user or sales administrator.

2. In Setup and Maintenance, search for the task list Manage Sales Forecasting Schedulable Processes and expand the task list to see all schedulable processes.

3. Find the Run Refresh Forecast Process task and click **Go to Task.**

4. To run the process immediately, click **Submit**.
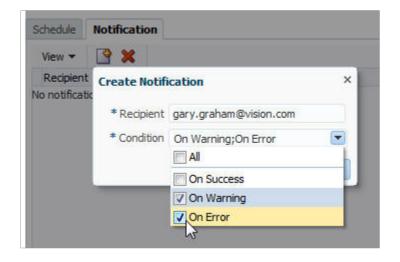
   If opportunities were bulk loaded into the database, it may take some time to refresh the forecast with the new data.

5. Schedule the Refresh Forecast process. The recommendation is to schedule the Refresh Forecast process to be run a day before the territory freeze date. Click **Advanced** in the Run Refresh Forecast Process page.

6. Select **Run Using a Schedule**.

7. For Frequency, select **Monthly**.

8. Select start and end dates and times.

9. Go to the Notification tab.

10. Click **Create Notification**.

11. Enter the e-mail address for the person who should receive notifications.

12. In the **Condition** field, you should select **On Warning** and **On Error** as a minimum.

13. Find the Run Due Date Check Process task and click **Go to Task.**

14. Repeat the steps to schedule this process to run after midnight each day. Create a notification for this process as well.

15. Click **Submit**.

See the Define Sales Forecasting chapter of the Oracle Sales Cloud Implementing Sales guide for information about other forecasting processes.

Timing for Forecast Processes

At the end of a scheduled forecast (the due date), you want to give the processes time to run before the territory freeze date of the next forecast, which is the start of forecast activities. Salespeople will then have accurate information to work with when they update and submit their forecasts.

The recommendation in the Creating a Forecast topic is to provide a one day gap to run both the Refresh Forecast and the Due Date Check processes. The Refresh Forecast process should be scheduled to be run the night before the freeze date The Due Date Check process should be scheduled to be run daily after midnight, for example, at 12:05 a.m.

17 Setting Up Oracle Social Network

About Setting Up Oracle Social Network with Oracle Sales Cloud

Oracle Social Network is a secure, private social network that integrates with Oracle Sales Cloud and connects you with all your colleagues.

You can use Oracle Social Network for:

- Discussing projects, plans, and issues in public forums, membership groups, or one-on-one.

- Reviewing and publishing files.

- Following the daily activities of the people you choose.

The real power of Oracle Social Network is how easily it integrates with common sales objects. For example, you can bring an Oracle Sales Cloud opportunity into a Conversation where you can discuss it, plan around it, and share it. You can take the opportunity from possibility to realization without losing any of the casual and formal information that flows from all of this activity.

With Oracle Social Network, you and your teams have the tools you need to collaborate, capitalize on collective experience, and make informed business decisions.

Before you can use it to integrate with your Oracle Sales Cloud objects (such as leads or opportunities), both you as the administrator and your end users must perform some setup tasks. These setup tasks include:

- As the administrator, you must enable Oracle Sales Cloud objects for Oracle Social Network.

- Your end users can then enable any Oracle Sales Cloud records that they want to include Oracle Social Network Conversations on.

Enabling Oracle Sales Cloud Objects for Oracle Social Network

Before users can make individual Oracle Sales Cloud records available to include Oracle Social Network Conversations in, you must enable the objects. You can enable entire objects or only certain attributes of the objects. You can also decide whether new objects are automatically shared in Oracle Social Network or whether they need to be manually shared.

Enabling Oracle Sales Cloud Records for Oracle Social Network

After you have enabled an object, users must share the object records they wish to collaborate on with Oracle Social Network.

Setting Up Oracle Sales Cloud for Oracle Social Network

With Oracle Social Network, you can create Social Objects and Conversations that are associated with an Oracle Sales Cloud object record, such as an opportunity. Social Objects are Oracle Sales Cloud object records that are mapped into Oracle Social Network. As the administrator, you can expose a record from an Oracle Sales Cloud application in Oracle Social Network so selected people can see it.

Enabling an Object for Oracle Social Network
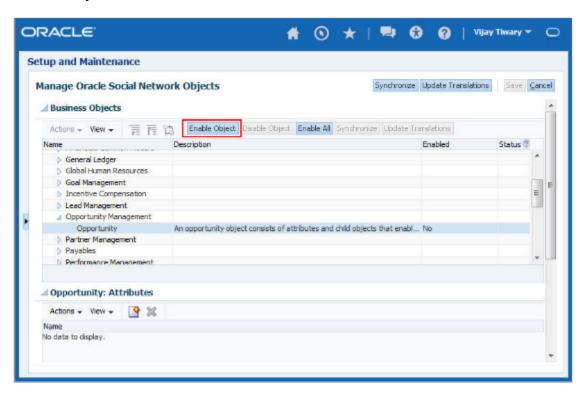
You want to be able to share information about sales opportunities with colleagues in other teams. Before this can happen, you need to enable the Opportunity object. Once the object is enabled, team members can then enable individual opportunity records for discussion in Oracle Social Network.

However, the sales manager has decided not to allow the sharing of all the information in the opportunity object, since some of it is sensitive and he doesn't want everyone to be able to view it. Specifically, he doesn't want the Level of Risk and Strategic Value attributes shared. Further, he has instructed you to set up the Opportunity object so that each time someone creates a new opportunity record, that record isn't shared automatically but must be manually marked for sharing.

Enabling the Opportunity Object for Manual Sharing

To let users manually control which opportunity records are enabled for collaboration, follow these steps:

1. Sign in as a setup user or sales administrator.

2. In the Setup and Maintenance work area, find the Manage Oracle Social Network Objects task.

3. Click the **Go to Task** icon for the task.

4. Scroll down to Opportunity Management, open it and select Opportunity as the object you want to enable.

5. Click **Enable Object**.
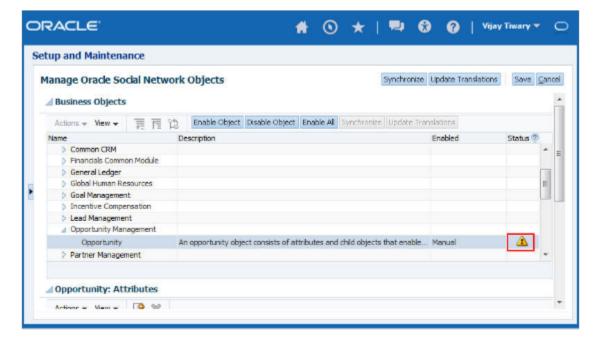
6. Since you want users to manually integrate each new opportunity record with Oracle Social Network, select Manual and click **OK**.

Opportunity: Enable Object   ✕

Select how the Business Object will integrate with Oracle Social Network.

  ⦿ Manual

  ○ Automatic

  ○ No

                                                          OK   Cancel

7. Click **Save**.

8. Notice that the Opportunity now includes a Warning icon in the Status column. You still need to enable attributes for the object.
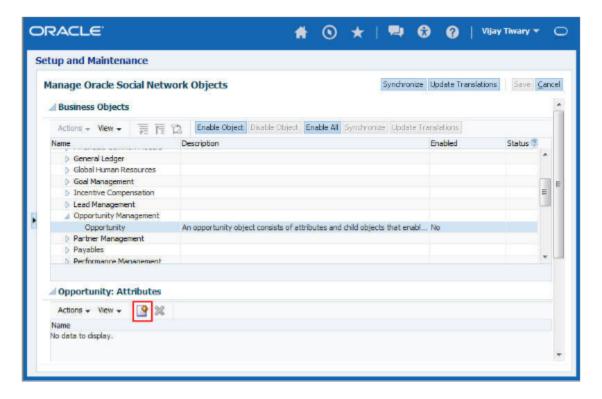
Enabling the Opportunity Object Attributes
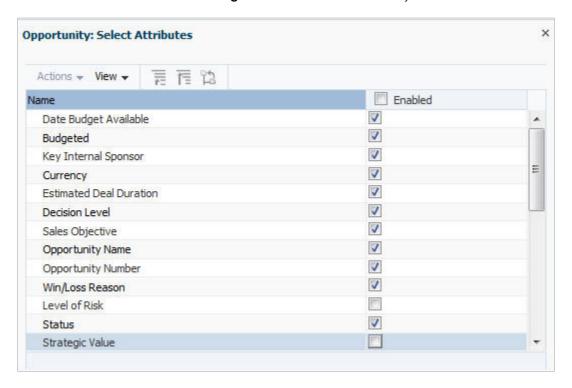
To enable the attributes you want to make available to share:

1. Under Attributes, click the **New** button.
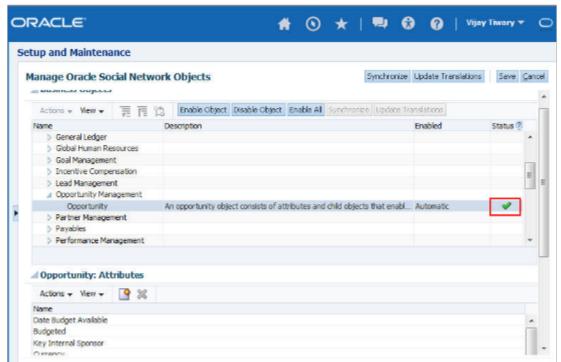
2. A list of attributes for Opportunity is displayed. The sales manager doesn't want the Level of Risk and Strategic Value attributes enabled, so select the **Enabled** check box at the top to enable all the attributes, then scroll down and deselect the **Level of Risk** and **Strategic Value** check boxes so they won't be enabled.

Opportunity: Select Attributes   ✕

Actions ▾   View ▾   ⧉ ⧉ ⧉

Name	☐ Enabled	
Date Budget Available	☑	▲
Budgeted	☑	
Key Internal Sponsor	☑	
Currency	☑	☰
Estimated Deal Duration	☑	
Decision Level	☑	
Sales Objective	☑	
Opportunity Name	☑	
Opportunity Number	☑	
Win/Loss Reason	☑	
Level of Risk	☐	
Status	☑	
Strategic Value	☐	▼

3. Click **OK**.

ORACLE®
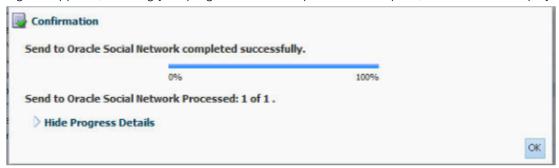
Notice that a green check mark now appears in the Opportunity object's Status column.

4. Click **Save**.

5. A dialog box appears, showing your progress. When the process is complete, a confirmation displays.

Related Topics

- Oracle Sales Cloud Social Network Administration: Overview

Enabling Oracle Sales Cloud Object Records for Oracle Social Network
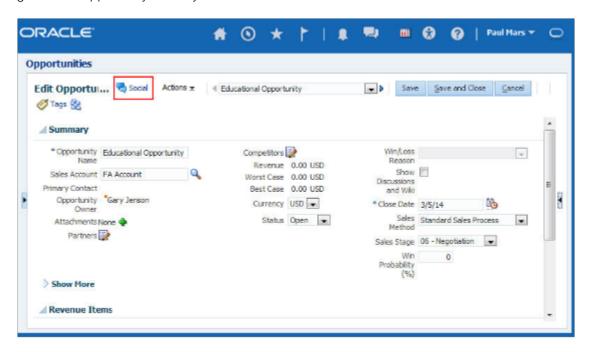
After you have enabled one or more Oracle Sales Cloud objects for use with Oracle Social Network, your end users can share object records for Oracle Social Network Conversations.

Sharing an Object Record

You have enabled the Opportunity object for Oracle Social Network, and now an end user wants to start a Conversation with her team members about a particular opportunity. To do that, she must share the opportunity record so that all her team can see it. She does this by enabling it as a Social Object. To enable a record as a Social Object:
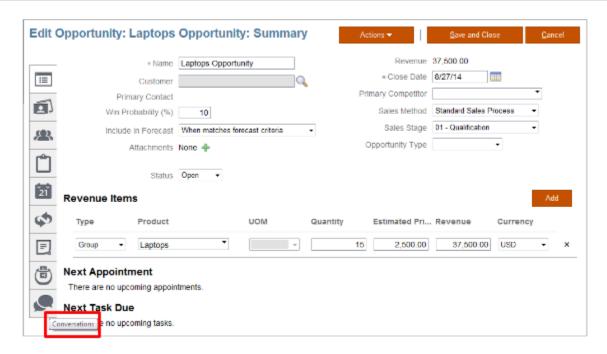
1. Navigate to the opportunity record you want to share.
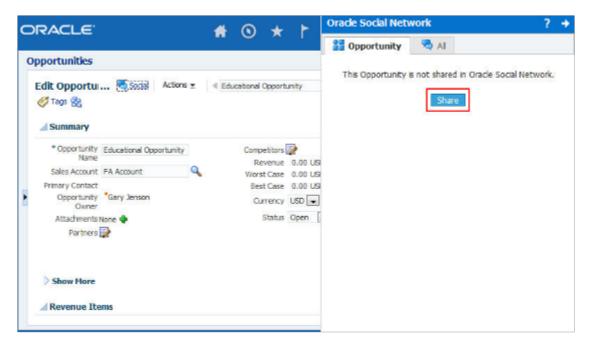
Notice that the opportunity record includes a **Social** link at the top. This was added because the administrator has enabled the Opportunity object for Oracle Social Network.

On the simplified UI, the opportunity record includes a **Conversations** subtab.

ORACLE
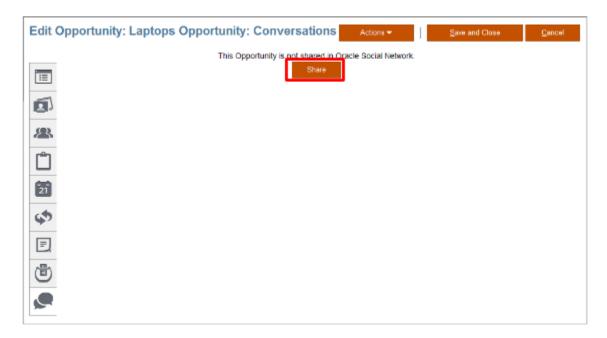
2. Click the **Social** link, or the Conversations subtab when in the simplified UI.

ORACLE
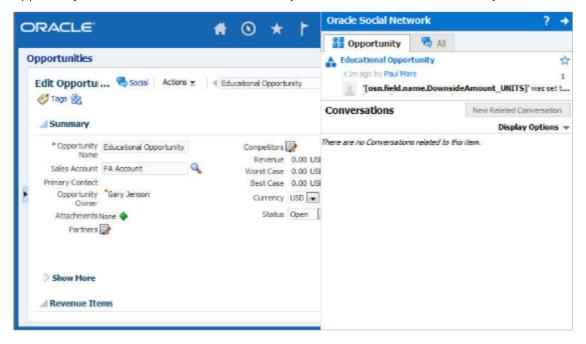
On the desktop UI, a panel appears on the right side of the record. Because no one has shared this opportunity record as a Social Object yet, a **Share** button appears.
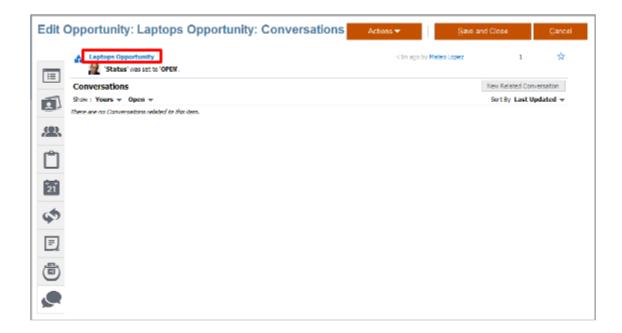
> **Note**
>
> If someone had already shared this record, you would see a **Join** button that would allow you to join the existing Conversation.

3. Click the **Share** button

4. The opportunity record is now shared as a Social Object. Your team members can now join the Conversation.

ORACLE

18 Setting Up Microsoft Outlook

Overview of Oracle Sales Cloud for Outlook

The Oracle Sales Cloud for Outlook application helps maximize sales productivity by providing Oracle Sales Cloud capabilities directly within Microsoft Outlook, thereby allowing sales professionals access to essential Sales Cloud data.

Summary of Features

The key features of Oracle Sales Cloud for Outlook are:

- Sales Cloud capabilities within Microsoft Outlook: Using Oracle Sales Cloud for Outlook, all e-mails, calendar events, and tasks can be linked to the respective contact, customer, lead, or opportunity within Oracle Sales Cloud. Sales professionals can access and update customer and sales information within Microsoft Outlook.

- Single-click sharing between Microsoft Outlook and Oracle Sales Cloud: 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 of Oracle Sales Cloud in the background.

- Synchronization of data between Oracle Sales Cloud and Microsoft Outlook: Two-way data synchronization allows sales professionals to have a continuously updated and accurate 360-degree view of Sales Cloud data changes.

- Synchronization Control Panel: Oracle Sales Cloud for Outlook provides synchronization filtering capabilities, enabling sales professionals to synchronize only the most critical data from Oracle Sales Cloud. Sales professionals can synchronize high-priority accounts or opportunities closing this quarter, instead of synchronizing the entire data set from Oracle Sales Cloud.

- Offline access: The transition between online and offline modes of operation allows sales professionals 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 Oracle Sales Cloud for Outlook: Add to the standard Microsoft Outlook view, or rearrange how the page looks, using Oracle Sales Cloud for Outlook's customizable objects, fields, and UI layout options. For example, Custom objects, competitors or other objects that you rely on can be added to the application to cater to specific organizational or user requirements.

Related Topics

- Implement Oracle Sales Cloud for Outlook: Explained

Overview of Oracle Sales Cloud for Outlook Installation

This topic describes how to install Oracle Sales Cloud for Outlook manually on each laptop or PC.

Before installing Oracle Sales Cloud for Outlook, ensure that:

- Microsoft Outlook is installed on the laptop or PC.

- An existing Microsoft Outlook profile is available for use with Oracle Sales Cloud for Outlook, or a new Microsoft Outlook profile has been created.

- The user performing the installation is a sales application user provisioned with either the Sales Representative or the Sales Manager job role, but not both. The user must not have the Sales Administrator job role assigned.

Use this procedure to install Oracle Sales Cloud for Outlook

1. Download the Oracle Sales Cloud for Outlook installer file.

2. Run the InstallShield Wizard.

3. Enter the Oracle Sales Cloud connection information, if the administrator has not already set it up.

The first synchronization begins. For details, see the Installing the Oracle Sales Cloud for Outlook Application topic.

Installing the Oracle Sales Cloud for Outlook Application

This topic explains how to install the Oracle Sales Cloud for Outlook application on a laptop or PC.

Download the Oracle Sales Cloud for Outlook installer file, run the InstallShield Wizard, and enter the Oracle Sales Cloud server connection information, if required.

Downloading Oracle Sales Cloud for Microsoft Outlook Installer File

1. Sign in as either a sales manager or a salesperson, 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 click **Start Download** to download the installer.

Running the InstallShield Wizard

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 change them if necessary.

4. Click **Next**.

5. 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**.

6. When you have confirmed or selected a folder on the Destination Folder page, click **Next**.

7. On the Ready to Install the Program page, click **Install**.

Entering the Oracle Sales Cloud Server Connection Information
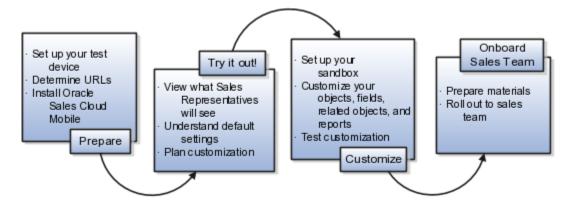
1. After the InstallShield wizard completes, open Microsoft Outlook.

2. On the Choose Profile page, choose the Microsoft Outlook profile that you want to use with Oracle Sales Cloud for Outlook, then click **OK**.

3. On the message asking if you want to install the application using the profile you selected in step 2, click **Yes**.

4. When the Oracle Sales Cloud for 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 Sales Cloud server information.

   The server information may be set up by default based on your administrator settings.

6. Click **Login** to complete the installation.

19 Setting Up Mobile

Oracle Sales Cloud Mobile Setup Overview

The Setting Up Mobile chapter provides information to help you set up and roll out Oracle Sales Cloud Mobile (Sales Cloud Mobile) at your organization.

Prepare

First of all, you need to prepare the device you are using to test your implementation of Sales Cloud Mobile application. Ensure that your company's mobile devices and their operating systems are supported by checking the topic, What are the supported platforms for Oracle Sales Cloud Mobile? Then follow the steps outlined in the topics, Finding Your Company's Host URL for Oracle Sales Cloud Mobile and Installing the Oracle Sales Cloud Mobile Application.

Try It Out

Become familiar with the application to understand the default settings and behavior, outlined in the topic, Reviewing Oracle Sales Cloud Mobile's Features.

Customize

If required, change the application to meet your business requirements by following the topics, Customizing Oracle Sales Cloud, through to the Testing Your Customizations.

Roll Out to Your Sales Team

Get ready to roll out Sales Cloud Mobile to your sales force by using the suggestions provided in the topic, Rolling Out Oracle Sales Mobile to Your Sales Team.

What are the supported platforms for Oracle Sales Cloud Mobile?

See the System Requirements for Oracle Applications Cloud at: http://www.oracle.com/us/products/system-requirements/overview/index.html

Determining Your Company's Host URL for Oracle Sales Cloud Mobile

You must determine the host portion of the URL for entry in the Host field when signing into Sales Cloud Mobile on mobile devices. Follow these steps to determine the two Host URLs that you'll require (one URL for for iPhones and Android devices, and one for BlackBerry devices).

Determining the Host URL for iPhone and Android Devices

1. Sign into Oracle Sales Cloud as a setup user.

2. Copy the URL in your browser's address bar to the Notepad.

   Here is an example: : https://fap0655-crm.oracleads.com/crmCommon/faces/ ExtnConfiguratorHome?
   _afrLoop=1134989893797000&webApp=HomePage&fndHomePageViewId=%2FAtkHomePageWelcome&fnd=%3B%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 is: fap0655-crm.oracleads.com.

4. When you're rolling out Sales Cloud Mobile to your users, inform them of the Host URL value, so that they can enter the URL when they're signing into the application.

Determining the Host URL for BlackBerry Devices

1. Start with this URL: https://host/sales/faces/MobileInstallerMain.

2. Replace **host** with the host URL value that you determined in the previous section, Determining the Host URL for iPhone and Android Devices.

   Therefore, in our example, the URL for a BlackBerry installation would be: https:// fap0655-crm.oracleads.com /sales/faces/ MobileInstallerMain.

3. Inform your users of the Host URL value when you roll out Sales Cloud Mobile to the sales team.

Installing the Oracle Sales Cloud Mobile iPhone Application

Follow these steps to install the Oracle Sales Cloud Mobile iPhone Application.

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 the host URL that you located in the previous topic called 'Determining Your Company's Host URL for Oracle Sales Cloud Mobile'.

4. Enter your user name and password.

5. Sign in to the Oracle Sales Cloud Mobile application.

Installing the Oracle Sales Cloud Mobile Android Application

Follow these steps to install the Oracle Sales Cloud Mobile Android Application.

1. Using your Android device, sign in to Google Play, and browse the applications.

2. Search for **Oracle Sales Cloud Mobile** and then tap **Install**.

3. Enter the host URL that you located in the previous topic called 'Determining Your Company's Host URL for Oracle Sales Cloud Mobile'.

4. Open the Oracle Sales Cloud Mobile application, and enter your user name and password.

5. Sign in to the Oracle Sales Cloud Mobile application.

Installing the Oracle Sales Cloud Mobile BlackBerry Application

Follow these steps to install the Oracle Sales Cloud Mobile BlackBerry Application.

1. Check that the BlackBerry's Wi-Fi is switched on.

2. Using the BlackBerry's browser, enter the host URL that you located in the previous topic called 'Determining Your Company's Host URL for Oracle Sales Cloud Mobile'.

3. Enter the authentication credentials to sign in.

4. Click **Start Download** to start the download and installation.

Reviewing Oracle Sales Cloud Mobile's Features

Before making Oracle Sales Cloud Mobile available to your sales team, it's best to familiarize yourself with the default features of the application so that you can decide whether you want to customize any aspects of the application.

ORACLE

The following set of actions may help you to decide if the application needs to be customized to your requirements.

Explore Oracle Sales Cloud Mobile

If you have data in your Oracle Sales Cloud application, sign in to the application following the steps outlined in the mobile installation topics. If you don't have any data, then you can use the demo data by tapping **Demo Mode** on the sign in page.

Familiarize Yourself with the Default Objects, Fields, and Reports

Become familiar with the default objects, fields, and reports. While doing that, think about the following questions:

- What can you do with each object: Create, edit, or just view?

- What fields and related objects are displayed with each object?

- What reports are available?

Consider if You Need to Customize the Application

Once you're familiar with the default objects, fields, related objects, and reports, consider if you need to change anything to address your organization's needs.

- Does Sales Cloud Mobile display the objects - standard and custom - that your sales team needs to work with?

- Are the correct fields displayed for each of those objects?

- Do you want to add or remove other fields, including custom fields?

- Do you need to add any related objects? Do you want to add, remove, or customize reports?

If you decide that you do need customize Sales Cloud Mobile, then the next section provides information about customizing Sales Cloud Mobile, and how to test your changes.

Oracle Sales Cloud Mobile Extensibility Overview

Use Application Composer to customize the Oracle Sales Cloud Mobile Sales iPhone, Android and BlackBerry applications. Using Application Composer, you can manage which objects and fields are visible on the Oracle Sales Cloud Mobile application without having to carry out specific customizations for a particular device.

You can customize 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).

- Configure the Sales Cloud Mobile home page, and add Business Intelligence reports to the Sales Cloud Mobile application.

Customizing Oracle Sales Cloud Mobile

This procedure shows you how to customize Oracle Sales Cloud Mobile for a specified sales object using Application Composer. For more information about Application Composer, see the Oracle Sales Cloud: Extending Sales Guide.

First you must open or create a sandbox, and then you customize Oracle Sales Cloud Mobile using Application Composer.

Opening or Creating a Sandbox

1. Sign in to Oracle Sales Cloud with a user that has a Sales Cloud Administrator job role.

2. In the global region, expand the Settings and Actions menu, then select Manage Sandboxes, under the Administration subheading.

3. Select the sandbox that you want to use to make your customizations. You might need to make a sandbox active, or create a sandbox, if a suitable sandbox does not exist.

Customizing Oracle Sales Cloud Mobile Using Application Composer

1. Open Application Composer by using the Navigator menu, and selecting **Application Composer** under the Tools, Customization category.

2. Select the application you want to customize within Application Composer.

3. Within the application you chose in step 1, select the custom or standard object you want to customize.

4. Select the **Pages** node in the navigation tree.

5. Select the **Mobile Pages** tab to see the mobile configuration options for the parent and its child objects.

6. Click either **Create <object name>**, or **Edit <object name>,** depending on whether the object is already enabled for Sales Cloud Mobile. You can also create or edit the child objects that appear under the main object.

7. Navigate through the configuration wizard to customize your selected object.

Adding or Removing Object Icons From the Sales Cloud Mobile Home Page

You can add or remove object icons from the Sales Cloud Mobile application, as follows:

1. Within Application Composer, open the **Mobile Application Setup** page, either by clicking the page link under the Common Setup list, or by clicking the page link in the Overview section of the Application Composer page.

2. Click **Configure Springboard**.

3. Select the object you want to add or remove, and click the arrows pointing toward the right or left, moving the object to the **Available** list, or **Selected** list.

4. Click **Save and Close**.

Displaying a List of Products for Revenue Items

You can enable users to add products to a revenue item, by following these setup steps:

1. Within Setup and Maintenance, search for the Manage Product Group Usage task.

2. Click the Go to button for the **Manage Product Group Usage** task.

3. Under Product Group Usage, select the Base row.

4. Select the Miscellaneous tab and click on the **Add** icon.

5. Create a New Row with the following values:

   ◦ Name: Hide Products

   ◦ Value: No

   ◦ Mode: Oracle Fusion Mobile Sales

   This displays a list of Products which enables users to attach a Product to a Revenue Item. If required, users will still be able to attach a Product Group to a Revenue Item, as well as a Product. If a Product list is not displayed then a user will only be able to attach a Product Group to a Revenue Item.

How can I set up the automatic password saving on smartphones and tablets?

Search for the Manage Administrator Profile Values task in the Setup and Maintenance work area. Set the **Password Save on Phone Enabled** profile option to either **Y** (Yes) or **N** (no).

Setting Up RSS Feeds

You can set up RSS feed sources so that the RSS feeds will appear at the bottom of the Sales Cloud Mobile pages, together with related objects, as follows:

1. Within Setup and Maintenance, search for the Manage Administrator Profile Values task.

ORACLE

2. Find the Manage Administrator Profile Values task and click **Go to Task**.

3. Search for the RSS Feed Source Profile Display Name.

4. Add RSS feed URLs as required.

Testing Oracle Sales Cloud Mobile Customizations

After customizing Oracle Sales Cloud Mobile, Oracle recommends that you test all of your changes using the sandbox that contains your customizations.

1. Sign in to Oracle Sales Cloud application as an Oracle Sales Cloud Mobile user that has a Sales Representative, Sales Manager, or Sales Vice President job role.

2. Select the sandbox that contains your customizations.

3. Keeping the Oracle Sales Cloud browser window open on your laptop or PC, open Oracle Sales Cloud Mobile on your smartphone and sign in using the same user you used to sign in to Oracle Sales Cloud. Signing in as the same user as in step 1 enables you to view the sandbox you selected in step 2 on your smartphone's Oracle Sales Cloud Mobile application.

    Note that only your user is accessing the sandbox on the Oracle Sales Cloud Mobile application (as long as the Oracle Sales Cloud browser window is open). All other users will view only the published version of the application.

4. Check the pages you have customized to ensure that they are working as expected.

5. Distribute your customizations to all Oracle Sales Cloud Mobile users by publishing your sandbox. Refer to the Publishing Sandboxes chapter of the Oracle Sales Cloud: Customizing Sales Guide for more information about publishing sandboxes.

Rolling Out Oracle Sales Mobile to Your Sales Team

After investigating the standard features of Oracle Sales Cloud Mobile, and configuring the application to meet your company's requirements, you may want to think about how you're going to roll out the application to your sales team. Here are some tips that might help you:

*   Collect feedback from users in your company who have been testing the application, and fine tune materials to address any issues they might have raised.

*   Capture screenshots on your mobile device to use in your training materials (several Internet sites exist with detailed instructions about how to do this).

> ✎ Note
> Note that if you want to include a screenshot of the Host URL field on the initial sign-in page, then the field only appears the first time you access the application. If you have already entered the Host URL, then you can uninstall and reinstall Sales Cloud Mobile and then the Host URL field will appear again.

- Consider presenting live training, by using software that lets you mirror your mobile device onto your PC.

- Create an intranet page with information and links relating to the application. One piece of information that is often requested is the company-specific Host URL.

- Make sure that your users have their mobile devices up and running.

Also refer to the article, Rollout Kit for Oracle Sales Cloud Mobile, available on My Oracle Support (https://support.oracle.com), Doc ID 1540393.1.

20 Additional Learning Resources

Oracle Sales Cloud Additional Resources

This topic lists additional documentation, training, and other available resources.

Go to the following locations to find more information:

- Documentation, including videos and tutorials, is available at http://docs.oracle.com/cloud/latest/salescs_gs/index.html. Or navigate from cloud.oracle.com to Resources - Getting Started: Documentation - Oracle Cloud Application Services: Sales.

- Tutorials are available on the Oracle Sales Cloud Learning Library at http://www.oracle.com/oll. Navigate to Products - Applications - Fusion Applications - Oracle Sales Cloud.

- More information on client and browser settings for Oracle Sales Cloud is located at http://www.oracle.com/us/products/system-requirements/overview/index.html.

Community

The **Oracle Applications Customer Connect** (https://appsconnect.custhelp.com) offers a place where you can connect with experts from Oracle, our partner community, and other users. Become part of this community to post tips, get answers to your questions, and find valuable information from the people using the application.

Training

Courses are available through Oracle University. You can find a full list of available courses at http://education.oracle.com/fusionapps. The following courses are recommended:

- Oracle Sales Cloud Implementation

- Oracle Sales Cloud Extensibility

Documentation

Solutions and documentation are available in the help and in guides. The following guides are recommended:

- Getting Started with Oracle Sales Cloud Customizations

- Oracle Sales Cloud Using Sales

- Oracle Sales Cloud Implementing Sales

- Oracle Sales Cloud Using Campaigns

- Oracle Sales Cloud Using Leads

- Oracle Sales Cloud Implementing Marketing

- Oracle Sales Cloud Using Marketing Segmentation

- Oracle Sales Cloud Using Customer Data Management

- Oracle Sales Cloud Customer Data Management Implementation Guide

- Oracle Sales Cloud Customizing Sales

These guides are available from http://docs.oracle.com.

Support Articles

Go to My Oracle Support at https://support.oracle.com for the latest implementation articles.

ORACLE®

Glossary

abstract role

A description of a person's function in the enterprise that is unrelated to the person's job (position), such as employee, contingent worker, or line manager. A type of enterprise role.

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 customers, leads, and opportunities.

enterprise role

Enterprise roles provide users with access both to the application functions they need to perform their jobs as well as the permissions to access the data where they need to perform those functions. There are two types of enterprise roles: job roles and abstract roles. Job roles permit users to perform activities specific to their job. Abstract roles permit users to perform functions that span the different jobs in the enterprise.

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.

job role

Job roles provide users with access to both the application functions they need to perform specific jobs in you organization as well as the permissions to access the data where they need to perform the job functions. Examples of job roles provided by Oracle include Sales Administrator, Sales Manager, and Sales Representative.

resource role

Resource roles indicate the role a resource plays as an individual, or within a resource team.

setup user

A user with permissions to perform implementation tasks, including the creating of other users and security modifications. Setup users are provisioned with the following enterprise roles: Application Implementation Consultant, IT Security Manager, Application Diagnostic Administrator, Customer Relationship Management Application Administrator, and Employee. A setup user can be created by the initial user provided by Oracle or by another setup user.

territory

The jurisdiction of responsibility of a salesperson or sales manager over a set of customers. 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.

ORACLE®