

# Oracle Fusion Cloud Sales Automation

---

## **Implementation Reference**



Oracle Fusion Cloud Sales Automation  
Implementation Reference

F77853-19

Copyright © 2011, 2024, Oracle and/or its affiliates.

Author: Carmen Myrick

# Contents

|                                                             |           |
|-------------------------------------------------------------|-----------|
| <b>Get Help</b>                                             | <b>i</b>  |
| <hr/>                                                       |           |
| <b>1 About This Guide</b>                                   | <b>1</b>  |
| Audience and Scope                                          | 1         |
| Related Guides                                              | 2         |
| <b>2 Before You Begin</b>                                   | <b>7</b>  |
| Implementation Starting Point                               | 7         |
| Computer Requirements                                       | 8         |
| Data Migration Between Environments                         | 9         |
| Help                                                        | 10        |
| Navigation                                                  | 15        |
| Performance                                                 | 18        |
| <b>3 Profile Options, Lookups, and Scheduled Processes</b>  | <b>21</b> |
| What are Profile Options, Lookups, and Scheduled Processes? | 21        |
| Profile Options                                             | 21        |
| Lookup Types                                                | 24        |
| Scheduled Processes                                         | 32        |
| <b>4 Users and Security</b>                                 | <b>35</b> |
| Overview of Setting Up Users and Security                   | 35        |
| About the Sales Administrator                               | 37        |
| Discard Domain Emails                                       | 38        |
| Restricted Users                                            | 39        |
| Records Transfer Between Users                              | 41        |
| <b>5 Sales Resources, Roles, and Organizations</b>          | <b>43</b> |
| Overview of Managing Resources                              | 43        |
| How do I enable desktop pages for Resource Directory?       | 44        |
| Make an Employee a Sales Resource                           | 44        |

|                                                                  |    |
|------------------------------------------------------------------|----|
| How to Enable the Skill and Qualification Tabs on Resource Pages | 45 |
| Examples of Updating Resource Skills and Qualifications          | 46 |
| Resource Roles                                                   | 47 |
| Resource Organizations                                           | 51 |
| FAQs for Sales Resources, Roles, and Organizations               | 57 |

## **6 Geographies 65**

---

|                                                                |     |
|----------------------------------------------------------------|-----|
| Overview of Geographies                                        | 65  |
| What are the best practices for managing Geography mismatches? | 91  |
| Overview of Zone Types and Zones                               | 93  |
| Import Geographies and Zones                                   | 95  |
| Set Up Geocoding                                               | 120 |
| How You Set up Address Cleansing                               | 125 |
| FAQs for Loqate Support                                        | 125 |
| FAQs for Define Geographies                                    | 128 |

## **7 Common Components 135**

---

|                                          |     |
|------------------------------------------|-----|
| Overview of Setting Up Common Components | 135 |
| Actionable Infolets                      | 135 |
| Application Toolkit                      | 146 |
| Attachments                              | 146 |
| Calendar                                 | 148 |
| Click to Edit                            | 151 |
| Favorites                                | 153 |
| Languages                                | 153 |
| Lightbox Content Library                 | 155 |
| Mass Update of Records                   | 157 |
| Messages                                 | 161 |
| Notes                                    | 162 |
| Orchestration                            | 163 |
| Preferences                              | 164 |
| Privacy Statement                        | 166 |
| Public Unique IDs                        | 167 |
| Quoting                                  | 174 |
| Recent Items                             | 174 |
| Service Request Management               | 175 |
| Time Zone                                | 176 |



|           |     |
|-----------|-----|
| Watchlist | 177 |
|-----------|-----|

---

## **8 Multiple Business Units** **179**

---

|                                              |     |
|----------------------------------------------|-----|
| About Business Units                         | 179 |
| Overview of Multiple Business Units in Sales | 180 |
| Setup Tasks                                  | 183 |
| Sales Resources and Multiple Business Units  | 190 |
| Multiple Business Units in Territories       | 191 |
| Multiple Business Units in Leads             | 192 |
| Multiple Business Units in Opportunities     | 197 |
| Additional Implementation Concepts           | 203 |

---

## **9 Territories** **211**

---

|                                           |     |
|-------------------------------------------|-----|
| Overview of Territory Management Features | 211 |
| Territory Concepts                        | 211 |
| Territory Implementation                  | 218 |
| Address Dimension                         | 222 |
| Territory Dimensions                      | 225 |
| Territory Hierarchy                       | 235 |
| Territory Coverage                        | 246 |
| Custom Access Groups                      | 258 |
| Export and Import Management              | 259 |
| Import Approaches and Examples            | 264 |
| FAQs for Territories                      | 290 |

---

## **10 Multiple Currencies** **293**

---

|                                                                                    |     |
|------------------------------------------------------------------------------------|-----|
| Overview of Setting Up Multiple Currencies for Sales                               | 293 |
| Set Up Multiple Currencies for Sales                                               | 293 |
| How do I allow salespeople select a different currency in Opportunities and Leads? | 296 |
| Enable Multiple Currencies for Opportunity Product Lines                           | 297 |
| Implementation Concepts for Currencies                                             | 297 |

---

## **11 Adaptive Search and Workspace** **305**

---

|                                                     |     |
|-----------------------------------------------------|-----|
| Overview of Adaptive Search                         | 305 |
| Workspace and Work Areas Powered by Adaptive Search | 305 |
| Who Gets Workspace and New Work Areas Automatically | 309 |

|                                        |     |
|----------------------------------------|-----|
| Adaptive Search Setup                  | 310 |
| Saved Search Setup                     | 369 |
| Advanced Setup                         | 383 |
| Lists of Prioritized Recent Items      | 403 |
| Additional Configurations              | 405 |
| Workspace Extensions                   | 410 |
| Adaptive Search Troubleshooting        | 417 |
| FAQs for Adaptive Search and Workspace | 420 |
| Global Search                          | 422 |

## **12 Workspace Infolets 435**

---

|                                                   |     |
|---------------------------------------------------|-----|
| About Workspace Infolets                          | 435 |
| Edit the Enable Workspace Infolets Profile Option | 435 |
| Display Workspace Infolets                        | 436 |
| Modify Workspace Infolets                         | 438 |
| Set Up Additional Workspace Infolets              | 442 |
| Manage Custom Actions for Workspace Infolets      | 444 |

## **13 Legacy Work Area Search 445**

---

|                   |     |
|-------------------|-----|
| Work Area Search  | 445 |
| Search in Subtabs | 457 |

## **14 Work Assignment 461**

---

|                                              |     |
|----------------------------------------------|-----|
| Overview of Assignment Processing Components | 461 |
| Implementation Concepts for Assignment       | 462 |
| Assignment Mappings                          | 468 |
| Assignment Rules                             | 473 |
| Assignment Using Access Groups               | 479 |
| Assignment with User-Defined Objects         | 479 |
| Publish Assignment Changes                   | 480 |
| Account Assignment                           | 482 |
| Opportunity Assignment                       | 491 |
| Lead Assignment                              | 507 |
| Partner Assignment                           | 523 |
| Assignment Reports                           | 525 |
| FAQs for Assignment                          | 543 |

|           |                                                                                  |            |
|-----------|----------------------------------------------------------------------------------|------------|
| <b>15</b> | <b>Accounts and Contacts</b>                                                     | <b>551</b> |
|           | Overview of Accounts and Contacts                                                | 551        |
|           | Data Management                                                                  | 551        |
|           | Data Enrichment and Verification                                                 | 560        |
|           | Contact Preferences                                                              | 563        |
|           | Personally Identifiable Information                                              | 565        |
|           | Data Removal                                                                     | 566        |
|           | Additional Configurations                                                        | 569        |
|           | Integration with Third Parties                                                   | 581        |
|           | FAQs for Accounts and Contacts                                                   | 582        |
| <b>16</b> | <b>Activities</b>                                                                | <b>585</b> |
|           | Overview of Activities                                                           | 585        |
|           | Activity Search and Views                                                        | 585        |
|           | Activity Notifications and Delegation                                            | 586        |
|           | Activity Types and Subtypes                                                      | 592        |
|           | Additional Configurations                                                        | 594        |
| <b>17</b> | <b>Notifications</b>                                                             | <b>601</b> |
|           | Overview of Configuring Notifications for Sales                                  | 601        |
|           | Enable Notifications for Sales                                                   | 602        |
|           | Overview of Setting Up Notification Scripts and Preferences                      | 603        |
|           | Define Notification Scripts for Sales                                            | 603        |
|           | Configure Delivery Preferences and Text for a Notification                       | 604        |
|           | Debug Your Groovy Scripts                                                        | 606        |
|           | Sample Groovy Scripts for Notifications                                          | 608        |
|           | Configure Push Notifications                                                     | 612        |
| <b>18</b> | <b>Approval Workflows</b>                                                        | <b>613</b> |
|           | Configure Workflow Approvals and Notifications                                   | 613        |
|           | Create Approval Groups                                                           | 614        |
|           | Configure Approval Rule Sets and Rules                                           | 614        |
|           | Disable or Enable Workflow Notifications                                         | 621        |
|           | Define When to Automatically Dismiss or Withdraw Workflow Tasks                  | 622        |
|           | Synchronize Notifications in the Global Header and Home Page with Workflow Tasks | 623        |
|           | How Workflow Tasks Are Archived and Purged                                       | 624        |

|                                          |     |
|------------------------------------------|-----|
| Roles for Workflow Administration Access | 626 |
| Search for Workflow Tasks to Configure   | 626 |

## **19 Products** **629**

---

|                                                  |     |
|--------------------------------------------------|-----|
| Overview of Sales Products                       | 629 |
| Setup Tasks                                      | 630 |
| Work with Sales Products                         | 638 |
| Set Up Validation of Product Configurable Models | 643 |
| Speed Data Entry Using Dynamic Choice Lists      | 645 |
| Implementation Concepts                          | 646 |

## **20 Price Books** **651**

---

|                                           |     |
|-------------------------------------------|-----|
| Overview of Price Books                   | 651 |
| Work with Price Books                     | 651 |
| Price Book Statuses                       | 653 |
| Add the Default Price Book Check Box      | 653 |
| Use Access Groups to Secure Price Books   | 654 |
| Price Books in Opportunities and Accounts | 654 |

## **21 Sales Catalogs** **661**

---

|                              |     |
|------------------------------|-----|
| Overview of Sales Catalogs   | 661 |
| The Sales Catalog            | 662 |
| Setup Tasks                  | 666 |
| Usages, Options, and Actions | 679 |
| Additional Configurations    | 684 |
| Catalog Use Case Examples    | 691 |
| Catalog Troubleshooting      | 694 |
| FAQs for Sales Catalogs      | 696 |

## **22 Leads** **699**

---

|                                   |     |
|-----------------------------------|-----|
| Overview of Lead Management       | 699 |
| Implementation Concepts for Leads | 699 |
| Lead Qualification Templates      | 717 |

## **23 Opportunities** **721**

---

|                           |     |
|---------------------------|-----|
| Overview of Opportunities | 721 |
|---------------------------|-----|

|                                              |     |
|----------------------------------------------|-----|
| Sales Methods, Sales Stages, and Sales Coach | 723 |
| Sales Statuses                               | 731 |
| Opportunity Closure                          | 733 |
| Data Security                                | 738 |
| Default Sales Channel                        | 741 |
| Opportunity Search                           | 742 |
| Opportunity Setup Data Reference             | 746 |
| FAQs for Opportunities                       | 753 |

## **24 Opportunity Products and Revenue 757**

---

|                                                      |     |
|------------------------------------------------------|-----|
| Considerations for Setting Up Opportunity Revenue    | 757 |
| Enable the Products Subtab in Opportunities          | 758 |
| Enable Quick Edit to Opportunity Products            | 759 |
| Forecasted Revenue                                   | 760 |
| Sales Credits                                        | 763 |
| Recurring Products                                   | 767 |
| Additional Implementation Considerations for Revenue | 771 |
| FAQs for Opportunity Products and Revenue            | 777 |

## **25 Competitors 779**

---

|                                     |     |
|-------------------------------------|-----|
| Overview of Sales Competitors       | 779 |
| Manage Sales Competitors            | 779 |
| Enable Competitors in Opportunities | 783 |
| Enable Competitors in Leads         | 785 |

## **26 Business Plans 787**

---

|                                                      |     |
|------------------------------------------------------|-----|
| Overview of Business Plans                           | 787 |
| Enable Account Business Plans                        | 788 |
| Enable Objectives on the Business Plans Overview Tab | 788 |
| Considerations When Managing Business Plan Classes   | 789 |
| View Business Plan Lookups                           | 790 |

## **27 Assets 791**

---

|                                     |     |
|-------------------------------------|-----|
| Overview of Setting Up Sales Assets | 791 |
| Overview of Asset Security          | 792 |
| Setup Tasks                         | 793 |

|           |                                            |            |
|-----------|--------------------------------------------|------------|
| <b>28</b> | <b>Promotions</b>                          | <b>799</b> |
|           | Overview of Sales Promotions               | 799        |
|           | Work with Sales Promotions                 | 799        |
| <b>29</b> | <b>Assessments</b>                         | <b>803</b> |
|           | Overview of Assessments                    | 803        |
|           | Setup Tasks                                | 803        |
|           | Implementation Concepts for Assessments    | 808        |
|           | Opportunity Assessments                    | 814        |
|           | Lead Assessments                           | 817        |
| <b>30</b> | <b>Task Templates</b>                      | <b>821</b> |
|           | Overview of Task Templates                 | 821        |
|           | Setup Tasks                                | 821        |
|           | Implementation Concepts for Task Templates | 825        |
|           | Assessments Integration                    | 826        |
|           | Partner Integration                        | 829        |
| <b>31</b> | <b>Forecasting</b>                         | <b>833</b> |
|           | Enable Forecasts with Quick Setup          | 833        |
|           | Overview of Forecasts                      | 834        |
|           | Setup Tasks                                | 835        |
|           | Implementation Concepts for Forecasting    | 847        |
|           | Forecasting Processes                      | 854        |
|           | FAQs for Forecasting                       | 856        |
| <b>32</b> | <b>Quotas</b>                              | <b>859</b> |
|           | Overview of Sales Quotas                   | 859        |
|           | Quota Components                           | 859        |
|           | Quota Administration                       | 864        |
|           | Quota Assignment                           | 870        |
|           | FAQs for Quotas                            | 873        |
| <b>33</b> | <b>Intelligent Advisor</b>                 | <b>877</b> |
|           | Overview of Oracle Intelligent Advisor     | 877        |

|                                                        |            |
|--------------------------------------------------------|------------|
| Setup Tasks                                            | 878        |
| <b>34 Slack</b>                                        | <b>883</b> |
| Benefits of Integrating CX Sales with Slack            | 883        |
| <b>35 Analytics and Reports</b>                        | <b>885</b> |
| Analytics on the Go                                    | 885        |
| Analytics for Your Sales Teams                         | 885        |
| Overview of Infolets                                   | 888        |
| Configure Visualizations for CX Sales Mobile           | 889        |
| <b>36 Application Change Auditing</b>                  | <b>893</b> |
| Overview of Auditing in Oracle Applications            | 893        |
| Sales Applications Auditing                            | 896        |
| <b>37 Cross-Origin Resource Sharing</b>                | <b>905</b> |
| Overview of Cross-Origin Resource Sharing              | 905        |
| Configure CORS Headers                                 | 905        |
| <b>38 Microsoft 365</b>                                | <b>909</b> |
| About Integrating the Outlook Add-in with Oracle Sales | 909        |
| Overview of Microsoft 365 for Sales                    | 909        |
| Setup Steps                                            | 910        |
| Post-Setup Steps                                       | 926        |
| Additional Configurations                              | 935        |
| FAQs for Microsoft 365                                 | 952        |
| Microsoft Teams                                        | 960        |
| <b>39 Mobile</b>                                       | <b>967</b> |
| Overview of CX Sales Mobile                            | 967        |
| <b>40 Import and Export</b>                            | <b>971</b> |
| Overview of Import and Export                          | 971        |
| Options for Importing Data Into Your Application       | 971        |
| Overview of the Import and Export Management Framework | 974        |

|           |                                                                 |             |
|-----------|-----------------------------------------------------------------|-------------|
| <b>41</b> | <b>Configuring, Extending, and Integrating Sales</b>            | <b>975</b>  |
|           | Overview of Extending the CX Sales Applications                 | 975         |
|           | About Application Composer                                      | 977         |
|           | Use Page Composer to Extend Pages                               | 979         |
| <b>42</b> | <b>Extend Accounts, Contacts, and Households</b>                | <b>989</b>  |
|           | Overview of Account and Contact Extensibility                   | 989         |
|           | Extend Pages for Accounts                                       | 989         |
|           | Configure Default Search on Standard Subtabs for Accounts       | 992         |
|           | Select the Correct Name Field When You Configure Account Pages  | 993         |
|           | Modify the Overview Subtab                                      | 994         |
|           | Extend Pages for Contacts                                       | 1000        |
|           | Configure Default Search on Standard Subtabs for Contacts       | 1003        |
|           | Extend Application Pages for Relationships                      | 1004        |
| <b>43</b> | <b>Extend Assets</b>                                            | <b>1007</b> |
|           | Extend Pages for Assets                                         | 1007        |
|           | Extend Application Pages for Assets Using Application Composer  | 1008        |
| <b>44</b> | <b>Extend Activities</b>                                        | <b>1013</b> |
|           | Extend Application Pages for Activities                         | 1013        |
| <b>45</b> | <b>Extend Leads and Campaigns</b>                               | <b>1017</b> |
|           | Overview of Extending Sales Lead and Marketing Campaign Objects | 1017        |
|           | Overview of Campaign Management and Reporting                   | 1017        |
|           | Sales Leads                                                     | 1018        |
|           | Marketing Campaigns and Campaign Members                        | 1036        |
|           | Marketing Cloud Data                                            | 1042        |
|           | Digital Profile and Interaction Data                            | 1045        |
| <b>46</b> | <b>Extend Microsoft 365</b>                                     | <b>1049</b> |
|           | Overview of Extending Microsoft 365 for Sales                   | 1049        |
|           | Configure Oracle CX Sales for Microsoft 365                     | 1049        |
|           | Create a Layout for a Feature                                   | 1050        |
|           | Configure the Microsoft 365 Side Panel                          | 1051        |



|                                                         |      |
|---------------------------------------------------------|------|
| Set Role Permissions on the Layouts You Created         | 1052 |
| Create Advanced Criteria for a Layout                   | 1052 |
| Disable the Create, Edit, and Delete Actions on Objects | 1053 |
| Enable Do Not Contact Fields for Custom Layouts         | 1054 |
| Add User-Defined Links                                  | 1054 |
| Add a User-Defined Logo                                 | 1054 |
| Configure a Saved Search for Microsoft 365              | 1055 |
| FAQs for Extending Microsoft 365                        | 1055 |

## **47 Extend Opportunities and Related Objects 1059**

---

|                                                                                 |      |
|---------------------------------------------------------------------------------|------|
| Overview of Extending Sales and Opportunity Management Objects                  | 1059 |
| Extend Pages for Opportunities                                                  | 1059 |
| Example of Extending Pages for Opportunities Using Application Composer         | 1062 |
| Make Changes to Competitors Pages                                               | 1062 |
| Example of Modifying Your Object to Validate Assessments                        | 1064 |
| Hide and Reorder Opportunity Fields Using Page Composer                         | 1065 |
| Configure Default Search on Standard Subtabs for Opportunities                  | 1070 |
| Extend Search Region and Results for Opportunities                              | 1071 |
| How to Add Assessment Subtab to Opportunity UI                                  | 1072 |
| How to Add the Interactions History Subtab to Opportunities                     | 1072 |
| Create a Related Object Relationship Between Service Requests and Opportunities | 1073 |
| Enable the Subscriptions Subtab for Opportunities                               | 1075 |

## **48 Use Copy Maps 1077**

---

|                                                          |      |
|----------------------------------------------------------|------|
| Set Up Your Mapping File When Copying Opportunities      | 1077 |
| Create a Copy Map                                        | 1078 |
| Example of Modifying the Lead to Opportunity Copy Map    | 1081 |
| Update the Copy Map to Copy the Lead Contact Value       | 1083 |
| What's the lead-to-opportunity attribute mapping?        | 1084 |
| Link Campaigns Using the Lead to Opportunity Copy Map    | 1087 |
| Modify Lead Convert and Mass Lead Convert Pages          | 1087 |
| Enable a User-Defined Copy Lead To Opportunity Map Value | 1089 |
| Copy a Lead to Account and Contact Maps                  | 1090 |

## **49 Extend Quotes and Sales Orders 1093**

---

|                                           |      |
|-------------------------------------------|------|
| Extend Application Pages for Sales Orders | 1093 |
|-------------------------------------------|------|

|           |                                                                   |             |
|-----------|-------------------------------------------------------------------|-------------|
| <b>50</b> | <b>Extend Partner Relationship Management</b>                     | <b>1095</b> |
|           | Overview of Configuring Partner Pages                             | 1095        |
|           | Extend Application Pages for Partners                             | 1095        |
| <b>51</b> | <b>Extend Territory Management</b>                                | <b>1099</b> |
|           | How can I configure and extend application pages for territories? | 1099        |
|           | Configure and Extend Territory Management                         | 1100        |
|           | Create Custom Territory Attributes for Territory Assignment       | 1103        |
| <b>52</b> | <b>Extend Sales Forecasting</b>                                   | <b>1105</b> |
|           | Overview of Extending Forecasting Objects                         | 1105        |
|           | Configure and Extend Application Pages for Sales Forecasts        | 1105        |

# Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

## Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

## Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

## Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

## Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

## Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

## Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to [oracle\\_fusion\\_applications\\_help\\_ww\\_grp@oracle.com](mailto:oracle_fusion_applications_help_ww_grp@oracle.com).

Thanks for helping us improve our user assistance!



# 1 About This Guide

## Audience and Scope

Welcome to the Oracle Fusion Cloud Sales Automation: Implementation Reference guide.

**Note:** To learn how to start your implementation and how to implement a sales force automation solution, start with the *Implementing Sales* guide. The *Implementing Sales* guide covers key setups in both CX Sales and Digital Sales, the next generation of Oracle's sales application (Next Gen Sales).

Use this guide to learn about additional features and options:

- How to implement application functionality that's not covered in the *Implementing Sales* guide.
- How to configure sales application behavior with profile options and lookup types.
- How to administer the application. How to run scheduled processes to complete a data refresh, and how to set up auditing, for example.
- How to configure the pages of your CX Sales and CX Sales Mobile applications. How to add tabs and fields that are hidden by default, for example.
- How to manually perform some of the tasks automated by the Setup Assistant. The *Implementing Sales* guide assumes that you speed up your initial implementation using Setup Assistant. This guide covers the equivalent manual steps. For example, while the Setup Assistant sets up the root of your sales catalog with one entry, this guide provides the manual tasks to accomplish the same task.

This reference guide doesn't cover advanced configuration and extensibility tasks for either CX Sales or Digital Sales.

For information on creating and securing custom objects, modifying user interface pages, creating object workflows and custom subject areas, and writing Groovy scripts in CX Sales, see the *Oracle Fusion Cloud Applications: Configuring Applications Using Application Composer* guide.

For information on how to extend and configure Digital Sales features and UIs, see the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative.

For an overview of which features are available in CX Sales, which features are available in Digital Sales, and which features are available in both, see the topic *CX Sales and Digital Sales Features in the Sales Solution* in the *Implementing Sales* guide.

Look at the *Related Guides* topic in this chapter for other guides that you can consult as you implement, configure, and use the sales application.

**Note:** In previous releases, this guide was named *Implementing Sales*. In 22D, this guide is renamed the *Implementation Reference* guide and the *Implementing Digital Sales (Next Gen Sales)* guide is renamed to *Implementing Sales* guide.

## Related Guides

Implementing and configuring the sales applications may mean that you need to consult other guides in addition to this guide. All of these guides are on [Oracle Help Center](#).

## Implementation, Import, and Security Guides

Here are some implementation, import, and security guides you may want to consult:

| Guide                                                                                                                               | Description                                                                                                                                                                                                                                                  |
|-------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <a href="#">Oracle Fusion Cloud Sales Automation: Implementing Sales</a>                                                            | Covers the implementation of Digital Sales (Next Gen Sales) application and contains concepts and procedures you need to implement a sales force automation solution using key sales features.                                                               |
| <a href="#">Oracle Fusion Cloud Sales Automation: Getting Started with Your Partner Relationship Management Implementation</a>      | Describes how to set up partner features to support common use cases.                                                                                                                                                                                        |
| <a href="#">Oracle Fusion Cloud Customer Experience: Implementing Customer Data Management</a>                                      | Contains information to help implementors define the setup for managing customer information and the configuration for customer hub deployment.                                                                                                              |
| <a href="#">Oracle Fusion Cloud Sales Automation: Implementing Enterprise Contracts</a>                                             | Contains conceptual information and procedures needed to implement contract management features.                                                                                                                                                             |
| <a href="#">Oracle Fusion Cloud Sales Automation: Implementing Incentive Compensation</a>                                           | Contains information on implementing sales compensation and payment plans.                                                                                                                                                                                   |
| <a href="#">Oracle Fusion Cloud Sales Automation: Implementation Reference</a>                                                      | (This guide) Contains conceptual information and procedures needed to implement components and features of the sales applications. Meant to be used after your setups in the <a href="#">Oracle Fusion Cloud Sales Automation: Implementing Sales</a> guide. |
| <a href="#">Oracle Fusion Cloud Customer Experience: Understanding Import and Export Management for CX Sales and Fusion Service</a> | Intended for anyone involved in importing and exporting business data into and from the Oracle CX Sales and Oracle Fusion Service applications.                                                                                                              |
| <a href="#">Oracle Fusion Cloud Customer Experience: Securing Sales and Fusion Service</a>                                          | Contains information to help setup users and sales administrators configure access to sales functionality and data.                                                                                                                                          |
| <a href="#">Oracle Fusion Cloud Customer Experience: Security Reference for Sales and Fusion Service</a>                            | Lists the predefined security data that is included in the Oracle CX Sales and Oracle Fusion Service applications.                                                                                                                                           |
| <a href="#">Oracle Fusion Cloud Fusion Service: Implementing Digital Customer Service</a>                                           | Describes how to set up the digital customer service functionality.                                                                                                                                                                                          |

| Guide                                                                                | Description                                                                                                                                                   |
|--------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Oracle Fusion Cloud Fusion Service: Implementing Fusion Service</i>               | Contains conceptual information and procedures needed to implement the service request components and features of Oracle Fusion Cloud Fusion Service Service. |
| <i>Oracle Fusion Cloud Sales: Understanding Scheduled Processes</i>                  | Describes the scheduled processes for Oracle Fusion Cloud Sales and contains guidance on how to use them.                                                     |
| <i>Oracle Fusion Cloud Customer Experience: Integrating Sales with B2C Service</i>   | Describes the implementation and configuration steps required to integrate the sales and B2C service processes.                                               |
| <i>Oracle Fusion Cloud Customer Experience: Integrating Sales with Oracle Eloqua</i> | Describes the implementation and configuration steps required to integrate the sales applications with Oracle Eloqua.                                         |

## User Guides

These user guides can help end users as they work with the applications:

| Guide                                                                                                    | Description                                                                                                                                                                                                                                                                       |
|----------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Oracle Fusion Cloud Sales Automation: Using Sales</i>                                                 | Aimed at salespeople, sales managers, and other sales users. Contains information about performing day-to-day tasks in the CX Sales applications.                                                                                                                                 |
| <i>Oracle Fusion Cloud Sales Automation: Using Digital Sales (Next Gen Sales)</i>                        | Provides an introduction to the new Oracle Digital Sales application. It explains the principles of using the new interface and provides instructions on basic tasks. The guide doesn't explain the underlying CX Sales functionality. It focuses on what's new in Digital Sales. |
| <i>Oracle Fusion Cloud Sales Automation: Using Customer Contracts</i>                                    | Contains information about creating and managing customer contracts.                                                                                                                                                                                                              |
| <i>Oracle Fusion Cloud Sales Automation: Using Customer Data Management for Sales and Fusion Service</i> | Contains information about managing customer information and customer data quality.                                                                                                                                                                                               |
| <i>Oracle Fusion Cloud Sales Automation: Using Incentive Compensation</i>                                | Contains information on administering and maintaining sales compensation and payment plans.                                                                                                                                                                                       |
| <i>Oracle Fusion Cloud Fusion Service: Using Fusion Service</i>                                          | Contains information about creating service requests and managing service request queues.                                                                                                                                                                                         |

## Analytics Guides

These are the Oracle Fusion Cloud Sales Automation analytics guides for administrators:

| Guide                                                                                                                             | Description                                                                                                                                        |
|-----------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|
| <i>Oracle Fusion Cloud Customer Experience: Creating and Administering Analytics for Sales and Fusion Service</i>                 | Contains information for administrators as they access and build analytics and make them available to salespeople.                                 |
| <i>Oracle Fusion Cloud Customer Experience: Subject Areas for Transactional Business Intelligence in Sales and Fusion Service</i> | Provides descriptions, business questions, and security roles for the subject areas in the Oracle CX Sales and Oracle Fusion Service applications. |

## Configuration Guides

Use these configuration guides as you modify the applications:

| Guide                                                                                        | Description                                                                                            |
|----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|
| <i>Oracle Fusion Cloud Applications: Configuring Applications Using Application Composer</i> | Describes how to create and modify objects and to configure the user interfaces and navigation menus.  |
| <i>Oracle Fusion Cloud Applications: Configuring and Extending Applications</i>              | Describes the tools and concepts for configuring applications.                                         |
| <i>Oracle Fusion Cloud Applications: Groovy Scripting Reference</i>                          | Explains the basics of how you to use the Groovy scripting language to enhance the sales applications. |

## Common Applications Guides

You may want to consult these guides for common features:

| Guide                                                                        | Description                                                                                                                             |
|------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| <i>Oracle Cloud: Getting Started with Oracle Cloud Applications</i>          | Outlines the basics of getting started with your Oracle cloud service.                                                                  |
| <i>Oracle Fusion Cloud Applications: Using Functional Setup Manager</i>      | Describes how to use Oracle Functional Setup Manager (also known as the Setup and Maintenance work area) to implement the applications. |
| <i>Oracle Fusion Cloud Applications: Understanding Enterprise Structures</i> | Explains how to use the Oracle Fusion Applications enterprise structures to meet your company's legal and management objectives.        |
| <i>Oracle Fusion Cloud Applications: Using Common Features</i>               | Provides an overview of the application functionality that is common across the applications.                                           |



## Business Process Training Materials

You may also want to check out these business process training materials about Oracle Sales:

- [Acquiring](#)
- [Converting](#)



## 2 Before You Begin

### Implementation Starting Point

#### Getting Started with Your Implementation

As mentioned earlier in this guide, we strongly recommend you start your implementation following the procedures in the *Implementing Sales* guide.

After you have implemented the applications following the *Implementing Sales* guide, use this guide for other, not-so-common setups, for core concepts around CX Sales functionality, for CX Sales exensibility procedures, and for reference material.

#### Enter Your Company Information and Corporate Currency

If you're setting up sales as a stand-alone application and you aren't using Setup Assistant, then use these steps to enter basic information about your company.

**Note:** To understand the what the Setup Assistant does for you in your implementation, see the *What Setup Assistant Completes for You* topic.

After you complete the steps in this topic, the data entry pages become read-only, and the application automatically takes care of two required setups for you:

- Creates the rudimentary enterprise structures required for sales.  
The structure is for internal application use only. None of the information is visible to the sales organization.
- Creates a set of role-provisioning rules that provision users with the standard security roles they need for their jobs.

This is a one-time setup. After you enter the information on the Create Company Information page, the page becomes read-only and the title changes to Review Company Information.

You must follow different steps if you're setting up your sales applications together with other Oracle applications, such as Oracle Human Resources, Oracle Procurement, or Oracle Financials. See the instructions provided in the implementation guide for each application, in this case.

1. In the Setup and Maintenance work area, use the **Quick Setup** page for the **Company Profile** functional area:
  - Offering: Sales
  - Functional Area: Company Profile
2. In the Create Company Information page, enter your company name in the **Enterprise Name** field.
3. Enter the country where your company is located.
4. Enter your company street address. Don't enter city or state and other information.
5. The first and last name fields list the name of the user who's signed in to the sales application. You can edit the entries.

6. When you're satisfied that the information is correct, click **Submit**.

The application runs a background process to create the enterprise structure and create the role-provisioning rules.

7. Click **Refresh** to monitor the progress of the process.

When the process completes, the Review Company Information page displays both the information that you entered and the information that the process created for you. You can't edit any of the fields except Corporate Currency.

**Note:** None of the names you see are visible to salespeople, so they don't have to correspond to any actual entities in your organization.

| Field              | Description                                                                                     |
|--------------------|-------------------------------------------------------------------------------------------------|
| Enterprise Name    | The name you entered.                                                                           |
| Address            | The street address you entered.                                                                 |
| Legal Entity       | The enterprise name followed by the letters <b>LE</b> .                                         |
| Business Unit      | The enterprise name followed by the letters <b>LE BU</b> .                                      |
| Initial User       | Name of the user who's signed in.                                                               |
| Corporate Currency | By default, the corporate currency is US Dollar. You can select a different corporate currency. |

8. If your company uses a different currency than the US Dollar for your sales transactions, then select the currency from the **Corporate Currency** list.
9. Jot down the **Legal Entity** and **Business Unit** names. You must enter these names when importing users.
10. Click **Save and Close**.

## Computer Requirements

### Oracle Fusion Cloud Applications System Requirements

Before using Fusion Applications in browsers and on your mobile devices, check the operating systems, supported browsers, and other computer requirements.

Here are the minimum versions you need for your browsers.

| Browser         | Minimum Version |
|-----------------|-----------------|
| Apple Safari    | 16.4            |
| Google Chrome   | 111             |
| Microsoft Edge  | 111             |
| Mozilla Firefox | 111             |

Oracle supports all the platforms that the browser vendor supports, as indicated in this table. For mobile device operating systems, Oracle supports only the most recent browser.

| Operating System | Apple Safari   | Google Chrome                                                   | Microsoft Edge | Mozilla Firefox |
|------------------|----------------|-----------------------------------------------------------------|----------------|-----------------|
| Android          | Not applicable | Supported (Chrome for Android only, not native Android browser) | Not applicable | Not supported   |
| iOS/iPadOS       | Supported      | Not supported                                                   | Not supported  | Not supported   |
| Mac OS X         | Supported      | Supported                                                       | Not applicable | Supported       |
| Windows          | Not supported  | Supported                                                       | Supported      | Supported       |

## Other Requirements

To use the Oracle ADF Desktop Integration add-in for Excel, you need the appropriate Windows and Excel versions. See: [Supported Platforms for ADF Desktop Integration](#) (Doc ID 2242428.1).

# Data Migration Between Environments

## Considerations for Migrating Data Between Environments

When you implement and maintain your Oracle Cloud applications, you almost always need to migrate data from one environment to another during the application life cycle.

For example, one typical use case in any enterprise application implementation is to first implement the applications in a development or test application environment and then deploy it to a production application instance after thorough testing. You use various methods or tools to accomplish the migration of data.

**Note:** When you migrate data to a new environment, the application doesn't retain all user-set values for various parameters. You need to add these values manually. For example, you need to set some profile option values again, even if they were previously set.

For more information on migrating data between environments, see the *Overview of Setup Data Export and Import* topic in the *Oracle Applications Cloud Using Functional Setup Manager* guide.

#### Related Topics

- [Implementation Process](#)
- [How Copying Setup Configuration Helps](#)

## Help

### Find Guides, Readiness Material, and Other Resources

The Oracle Help Center (<https://docs.oracle.com>) has guides, videos, readiness material, and other resources for Oracle Fusion Cloud Applications.



Here are a couple examples of what you'll find in the Help Center:

- Guides give you cumulative information about all features in each cloud service, for example how to use, set up, and extend them.
- Readiness documents tell you what's new or changed in a particular release update. This material is published before the update happens, to help you prepare for it.

In the application, when you click links in help windows, most of the time you open a specific guide in the Help Center. From there, you can search or browse to find other content. Or, if you're on the oracle.com site, open the Resources menu and select **Documentation** to get to the Help Center. It's a good idea to bookmark the Help Center.

Let's take a look at how you can move around and find what you're looking for in the Help Center.

### Browse for Cumulative Content About a Cloud Service

Here's how you find guides, videos, and other resources:

1. From anywhere in the Oracle Help Center, open the main menu and select **Fusion Applications Suite** under Cloud Applications. Or, click **Fusion Applications Suite** on the Help Center home page.
2. On the Oracle Fusion Cloud Applications Suite page, browse the cloud services which are organized in categories.
3. Click the name of your cloud service.
4. On the main page for the cloud service, select a release update if you don't want to see the latest content.
5. Use the navigation pane to get to a specific guide, video, or other resource. Here are some examples of where you might go:
  - All Books or Videos: Get all the videos or guides for the cloud service.

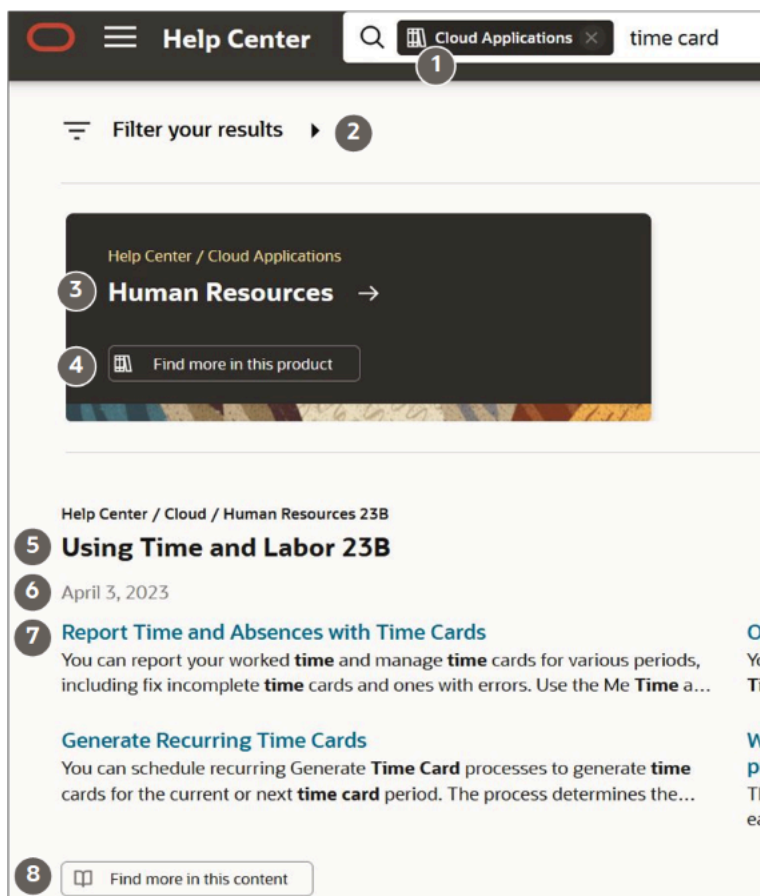
- On the Videos or All Books page, you can use the **View** list to filter by category.
- Most guides are available in multiple formats, for example HTML and PDF.
- o Top Tasks: Click a task category and then a specific, common task to go straight to information that will help you with that task.
- o APIs & Schema: Get reference information about APIs and schema details.

**Tip:** Use the breadcrumbs to get to other parts of the Help Center.

## Search Within or Across Guides

The scope of the search in the global header of the Oracle Help Center depends on the page you're on. For example, on the Oracle Fusion Cloud Applications Suite page, you search across all guides for Fusion Applications. On the pages for a specific cloud service, you search only within that service, which gives you more targeted results. If you want to search within one guide, use the search with the guide open.

Let's take a look what we can do with the search results. In this case, the first result is a guide, but you might also see other types of resources, such as videos, reference architecture and solution playbooks, or readiness material. And they might come from places other than the Help Center, for example My Oracle Support (<https://support.oracle.com>), oracle.com, or YouTube.



| Callout Number | What You Can Do                                                                        |
|----------------|----------------------------------------------------------------------------------------|
| 1              | Remove a filter from the search to get more results.                                   |
| 2              | Apply more filters to narrow down your choices, for example based on publication date. |
| 3              | Open the main page page for a product that has many results that match your search.    |
| 4              | See search results from this product.                                                  |
| 5              | Open the title page for a guide with content that matches your search terms.           |
| 6              | See when this guide was published.                                                     |
| 7              | Open a specific topic in this guide.                                                   |
| 8              | Get more search results in this guide.                                                 |

## Review Readiness Documents

Let's find the readiness material that can help you prepare for your next quarterly update:

1. On a page in the Oracle Help Center for your cloud service, click **Cloud Readiness / What's New** in the navigation pane.
2. On the main page in Oracle Cloud Readiness for your service, find the What's New subsection in the Essential Content section.
3. Click **HTML** to open a What's New document in a new browser tab.
4. Click the release update you want to review.
5. In the table of contents, click **Feature Summary** to see which features are enabled or disabled by default. You need to take action to make disabled features available to your users.
6. If you see an Opt In Expiration tab, click it to see when disabled features will become enabled by default.
7. Click the tab for your release update to go back and see the details about specific features.
8. Return to the browser tab with the main page for your cloud service to explore other readiness content. From there you can also jump over to other cloud services.

### Related Topics

- [Get Help in the Application](#)

## Set Up Help

You don't have to set anything up for help to work. But you can do optional setup, for example to give people access to add help content. First enable help features, then perform tasks in the Application Extensions functional area.



## Enable Features

In the Offerings work area, review these features at the offering level.

- Local Installation of Help: Make sure to leave this enabled.
- Access to Internet-Based Help Features: This feature isn't used, so it doesn't matter if you enable it or not.
- Help Content Management: Enable this feature if you want some people to be able to add company-specific help to help windows or the Getting Started work area.
- Security for Added Help: Enable this feature if you want certain help to be available only to a restricted set of user roles.

**CAUTION:** Enable this feature only if you have this requirement, because the feature can affect performance.

### Related Topics

- [How You Manage Different Types of Help](#)
- [Configure Offerings](#)
- [Hide or Show Help Icons](#)
- [Give People Access to Create and Edit Help](#)
- [Create Groups to Limit Access to Added Help](#)

## How You Manage Different Types of Help

You can edit the help content that comes with the application. You can also add your own help to help windows, for example to provide company policies. Let's look at the different types of help that you can manage.

| Help Type                    | How You See This Help                                                                                                              | How You Edit or Add to It                                                                                                                                                                                                                                                                                                                                                                                     |
|------------------------------|------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Fields and other UI elements | Help text appears when you hover over or click certain UI elements on the page.                                                    | You can edit this text using the User Interface Text tool, or add your own help text to buttons using Page Composer.                                                                                                                                                                                                                                                                                          |
| Help windows                 | Many pages have help icons. Click these icons to open help windows that contain help text, links, or both.                         | <p>You can use the User Interface Text tool to edit the help text. You can add or remove links by clicking the <b>Manage Help Content</b> link in the help window. But you can't create new help windows to put on the page.</p> <p>In some cases, the same help window appears on more than one page. So whatever you do to the help window on one page applies to the same help window in other places.</p> |
| Getting Started work area    | Select <b>Getting Started</b> from the Navigator to open this work area and review the videos and other information for new users. | You can edit or add to this content by clicking the <b>Edit Getting Started</b> link on these pages.                                                                                                                                                                                                                                                                                                          |

## What Else You Can Do

Here's what you can do with all the help that you or other people added to help windows and the Getting Started work area:

- If you add a lot of links in help windows, you might want to manage your help in a central place. You can use the **Manage Help Content** task in the Setup and Maintenance work area to view and edit all of the help that anyone added.
- If you create help in a test environment, you can migrate all added help by exporting and then importing a configuration package.

### Related Topics

- [Manage Help for Fields and Other UI Elements](#)
- [Add Your Content to a Help Window](#)
- [Modify Text Using User Interface Text Tool](#)
- [Manage Getting Started Content](#)

## Manage Guided Learning for Onboarding and Training

After you create content in Oracle Guided Learning, you need to apply it to the application so that you can test things out. Then, make your Guided Learning content available to your users.

If you have Oracle Guided Learning, you can create interactive guides and more for onboarding and training, to help people learn how to use Oracle Fusion Cloud Applications. For example, a guide takes users through each step of a task while they're in the application, down to which buttons to click and which fields to fill out. Most importantly, they get through the task in a way that fits your own business processes and practices.

Here's what you do after you create or update Guided Learning content:

1. Set the **Guided Learning Enabled** (FND\_GUIDED\_LEARNING\_ENABLED) profile option to **Yes** at the Site level.
  - Use the Manage Applications Core Administrator Profile Values task in the Application Extensions functional area.
  - You only need to do this once.
2. Activate a sandbox with the Guided Learning tool selected.
3. Define some settings to make sure that your Guided Learning content shows up in the application the way you want it.
  - a. In the Setup and Maintenance work area, go to the **Configure Guided Learning** task in the Application Extensions functional area.
  - b. On the Configure Guided Learning page, enter the application ID that was given to you when you first got Oracle Guided Learning.
  - c. Leave the default value in the **OGL Server** field unless you need to replace it with a different server, for example a test server.
  - d. Click **Save and Close**.
4. Test your Guided Learning content while you're in the sandbox.
5. Go back to Guided Learning to make any changes to your guides, including changing content from draft to published.
6. When you're ready, publish the sandbox to make your content available to users.

Next time you have new or changed Guided Learning content, start from step 2 again.

#### *Related Topics*

- [Oracle Guided Learning User Guide](#)
- [How do I update existing setup data?](#)
- [Set Profile Option Values](#)
- [Create and Activate Sandboxes](#)
- [Publish Sandboxes](#)

## Navigation

### Overview of the Main Navigation Components

Sales personnel use sales application work areas to perform their daily tasks. After signing in to the application, they land on the home page and use the home page springboard and global header icons to access the areas of the application where they do their work.

**Note:** The user interface described in this topic applies only to CX Sales, not to Digital Sales.

There are some main navigation and other components you should be aware of, such as:

- Home Page
- Springboard
- Navigator
- Global Header
- Settings and Actions Menu
- Infolets

### Home Page

The home page provides access to available work areas. Users can quickly pick from the available icon groups and then navigate to a specific work area to perform their tasks. A single click on the Home icon or the logo in the global header quickly returns users back to the home page with its springboard and infolets. You can select your default home page layout as panel, banner, or news feed. You can also create, edit, or delete company announcements for the home page.

From the Sales tab on the home page, you can quickly create sales records from just one page. Use the quick actions feature to create your opportunities, leads, contacts, and activities, including tasks, appointments, and call reports, from a single location.

### Springboard

The grid of icons on the home page is called the springboard. When you see a strip of icons above a page, that's also called the springboard. Whether or not a springboard displays at the top of the page depends on how the application is configured.

Sales users click the springboard icons to open the work areas and dashboards used in their main tasks.

If a user has access to more than 16 work areas, the application automatically groups the work areas under a parent icon (or folder).

Here are the conditions for work-area grouping and springboard icon display. This behavior applies to all sales user roles.

| User Access                                                               | Icon Display                                                                                                                                                                                    |
|---------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| User can access only one page entry or work area within a specific folder | The icon for the page entry/work area is displayed at the top level. For example, a sales representative with access to only leads, sees just the Leads icon at the top level on the home page. |
| User can access multiple page entries, up to 16                           | All page entry icons display at the top level.                                                                                                                                                  |
| User can access more than 16 page entries                                 | Page entries are grouped under a parent icon (folder). For example, the Sales icon displays with work areas for accounts, opportunities, and leads.                                             |
| User can access 15 or fewer page entries outside the Tools folder         | These icons appear at the top level, and only the icons under Tools remain in a folder.                                                                                                         |

## Navigator

The Navigator is the main menu, found in the global header.

Users access the Navigator to get to their work areas and dashboards. Note that the Navigator might have more page entry points than the springboard.

## Configuring the Springboard and Navigator

You can modify the springboard and Navigator using the Structure tool available to setup users. For example, you can:

- Specify whether certain Navigator menu items, springboard, and home page features display.
- Modify the structure, grouping, and ordering of the navigation menu items and the springboard icons.

To understand how to configure the springboard and home page to fit your unique business needs, see these guides:

- [Configuring Applications Using Application Composer](#)
- [Configuring and Extending Applications](#)
- [Using Common Features](#)

## Global Header

The global header is the area across the top of the UI. It is persistent across pages for all users. By default, the global header icons and links let users access:

- Home: Returns the user to the default home/landing page.
- User settings and actions: Among other actions, users can access personalization features, user preferences, and configuration tools (if allowed) by clicking on their user image or name in the global header. For more information on this menu, see the Settings and Actions Menu section later in this topic.
- Global search: If enabled, users can search key fields across multiple objects.

- Favorites and Recent items: Users can access links to pages that they have bookmarked or have opened recently.
- Watchlist: Users can access a list of transaction-related items that pertain to them.
- Notifications: Contains a user's appointment and task notifications.

You can modify the global header template. For more information, see the topics on modifying the global page template in the *Configuring and Extending Applications* guide.

## Settings and Actions Menu

All users can click their user image or name in the global header to open the Settings and Actions menu. In addition to letting you explicitly sign out, this menu lets you:

- Personalize the applications and set preferences, including changing password, setting the language, and adding a photo. The applications also support accessibility settings like font size, color contrast, and screen readers.
- Display the help icons on pages where they're available. Not all pages have help icons. The help icons give access to additional content in a separate window.
- Use the application as someone else if proxy users are enabled.
- Access configuration tools such as sandboxes, as well as the Setup and Maintenance work area. This access is only for administrators and setup users.

## Infolets

Infolets are configurable portals on the UI that show sales data summaries. Infolets show up as a row of dots on the home page, above the springboard.

You can create new infolets, and add or remove them as needed. For more information, see the *Overview of Infolets* topic in the *Creating and Administering Analytics* guide.

### Related Topics

- [Overview of Configuring Home Page and Navigation](#)
- [Define Home Page Appearance](#)
- [Set a Banner Message in the Global Header](#)

## Optimize Browser Space in Work Area and Detail Pages

Optimize browser space in the application by enabling the profile option, Advanced Responsive UI features. Optimizing browser space is especially helpful when salespeople use tablets or other small screens to view the application.

**Note:** The user interface described in this topic applies only to CX Sales, not to Digital Sales.

When the profile option is enabled, the application displays the most allowable amount of content on the screen. For example, it shows items near the edge of the screen on devices like tablets and phones.

Here's how to set the profile option:

1. Navigate to the **Manage Administrator Profile Values** task in Setup and Maintenance.

2. Search for the profile option, **Advanced Responsive UI features** (ZCA\_ADVANCED\_RESPONSIVE\_UI).
3. Set the profile option to **Yes** at Site level.

#### Related Topics

- [Set Profile Option Values](#)

## Performance

### Troubleshoot Performance Issues

An issue qualifies as a performance issue when a user's response time is slow when navigating to various objects or specific fields, such as dynamic choice lists or custom fields, or if there's a process that's taking a long time to complete.

This topic is a checklist you can use to troubleshoot the issue at user's end first. If the issue continues, we recommend that you contact Oracle Support to investigate the issue further.

#### Performance Checklist

Use this checklist to help troubleshoot performance issues:

| Issue Type                         | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | More Information                                                                                   |
|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|
| Is the user using the correct URL? | <p>Confirm that the user is working in the unified home page URL. Here's an example of the URL construction:</p> <p>If the pod name is <b>abcd-test</b> for your application, and your data center is located in Amsterdam, the data center code will be <b>EM2</b>. Thus, the unified URL will be <b>https://abcd-test.fa.em2.oraclecloud.com/fscmUI/faces/FuseWelcome</b></p>                                                                                                                                                                                                                          | If not, be sure to use the correct construction to provide better and faster navigation.           |
| What's the user's internet speed?  | <p>Ask the user to go to <b>https://fast.com/</b> and capture the screen shot of the internet speed test results.</p> <p>Ask the user to click <b>Show more info</b> in the speed test page. Check the latency and speed. If speed is low and latency is high, you might need to switch to a network with better speed and less latency.</p> <p>If that URL doesn't work, run these commands from the command prompt to see if you're getting a prompt response (attach the output to your service request).</p> <p><b>Command 1:</b></p> <pre>tracert &lt;application URL&gt;</pre> <p>For example:</p> | You will need all of this information to give to Oracle Support if the performance issue persists. |

| Issue Type                                     | Description                                                                                                                                                                                                               | More Information                                                                                                                                                                                                                                                            |
|------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                | <pre>tracert abcd- test.fs.em4.oraclecloud.com</pre> <p><b>Command 2:</b></p> <pre>ping &lt;application URL&gt;</pre> <p>For example:</p> <pre>ping abcd-test.fs.em4.oraclecloud.com</pre>                                |                                                                                                                                                                                                                                                                             |
| Are the browser settings optimal?              | <p>Validate the browser settings at the user's end.</p> <p>Also, use a different browser that doesn't have add-ins installed. Or, use the same browser in private window or incognito mode.</p>                           | Review the article, Best Practices for Browser Settings and Performance on Fusion Applications (Doc ID 13851071), on My Oracle Support. Have the user set up his browser according to the recommendations there.                                                            |
| Is Oracle Social Network active?               | Inactivate Oracle Social Network if the user isn't using it. This will optimize performance.                                                                                                                              | Review the article, How To Hide/Show Social Links in Cloud Apps UI (Doc ID 2055189.1), on My Oracle Support.                                                                                                                                                                |
| Is a saved search using too broad of criteria? | If the performance issue is with saved searches, we recommend that the user apply saved searches with selective filters instead of using the default blank or all options.                                                | Avoid using searches with leading wildcards. Avoid using the "All Records I can See" in the search. See the Personal Lists section in the Search chapter in the Using Sales guide for more details.                                                                         |
| Have the search processes been run?            | <p>For performance issues from the Find box, be sure to run the search scheduled processes:</p> <ul style="list-style-type: none"> <li>• Synchronize CRM Search Indexes</li> <li>• Optimize CRM Search Indexes</li> </ul> | See the Work Area Search section in the Search chapter in this guide.                                                                                                                                                                                                       |
| Are you using dynamic choice lists?            | If performance issues happen when the user clicks on a dynamic choice list, go into Application Composer and add a data filter to the list.                                                                               | See the Dynamic Choice Lists section in the Add Objects and Fields in the Configuring Applications Using Application Composer guide.                                                                                                                                        |
| Have the applications just been updated?       | If performance issues are occurring after an application update, have the user "warm up" the browser; in other words, click around in the application pages.                                                              | Try the same flow three times and see if the issue is reproducible.                                                                                                                                                                                                         |
| Have you just published sandboxes?             | Warm ups are needed for the application clicks after publishing sandboxes.                                                                                                                                                | <p>Usually, publishing a sandbox invalidates caches and that requires warm ups.</p> <p><b>Note:</b><br/>In production environments, sandbox usage should be minimal. You should always use the Customization Set Migration tool to migrate custom between environments.</p> |

| Issue Type                                                                           | Description                                                                                                                                                                    | More Information                                                                                                                                                               |
|--------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Is the user on a VPN, proxy, or mobile line connection?                              | The user may be on a VPN, proxy, or mobile line connection (mobile modem or tethering).                                                                                        | Refrain from using VPN, proxy, or mobile line connections (mobile modem or tethering). Always use a hard LAN line or a wired connection.                                       |
| Is the AF log set to finest?                                                         | The logging level may be set to finest. The log level should only be Severe at User and Site levels.                                                                           | Here are the recommended settings: <ul style="list-style-type: none"> <li>AF log enabled: <b>Yes</b></li> <li>AF log level: <b>Severe</b></li> <li>AF log module: %</li> </ul> |
| Are you using formulas on landing pages?                                             | Formula fields on landing (list) pages tend to add performance degradation for list page loading, and affect actions like search and create.                                   | Move these fields to edit pages in order to avoid any performance issues.                                                                                                      |
| Are you using <code>println</code> statements in Groovy in your production instance? | Any Groovy code that's promoted to production must be checked against <code>println</code> statements to ensure that <code>println</code> statements are commented or removed. | If your <code>println</code> statements haven't been commented or removed, these might cause performance degradation.                                                          |

#### Related Topics

- [How do I run the processes that index the legacy CRM Search?](#)
- [Create Your Personal List in a Work Area](#)
- [Overview of Sandboxes](#)
- [Data Filters for Dynamic Choice Lists](#)



# 3 Profile Options, Lookups, and Scheduled Processes

## What are Profile Options, Lookups, and Scheduled Processes?

Profile options, lookup types, and scheduled processes let you configure application behavior and process data.

Briefly, here's what profile options, lookup types, and scheduled processes do:

- Profile options: Let you configure the application behavior.
- Lookup types: Provide the lists of values in applications. Many lookup types can be modified to fit your business needs.
- Scheduled processes: Act on data in the applications.

Get additional information on profile options, lookup types, and scheduled processes in this chapter and in the related topics.

### *Related Topics*

- [How can I access predefined profile options?](#)
- [How can I access predefined lookups?](#)
- [What are scheduled processes?](#)

## Profile Options

### Overview of Profile Options

Profile options let you configure and control application data centrally. Administrators and setup users manage profile options in the Setup and Maintenance work area.

Profile options store various kinds of information. This table lists some examples:

| Type of Information      | Profile Option Setting Example    |
|--------------------------|-----------------------------------|
| User preferences         | Set preferences at the user level |
| Installation information | Identify the location of a portal |
| Configuration choices    | Change UI skins and actions       |

| Type of Information          | Profile Option Setting Example           |
|------------------------------|------------------------------------------|
| Processing options           | Determine how much information to log    |
| Enabling the Activity Stream | Enable agents to see the Activity Stream |

## Profile Option Hierarchy Levels

Profile options can be set at different levels, such as site level or user level. The application gives precedence to certain levels over others, when multiple levels are set. The levels that are allowed to be set are preconfigured with the application.

In the predefined profile option levels, the hierarchy levels and their precedence are:

1. **Site:** This level affects all applications for a given implementation. The application gives it the lowest precedence when other levels are set. If no other levels are set, however, it's the highest level.
2. **Product:** This level affects a product or product family. The application gives it priority over Site level. However, if the user level is set, the user level takes precedence.
3. **User:** This level affects only the current user. It has the highest precedence, over Site and Product.

As a best practice, set site-level profile option values before specifying values at any other level (where available). The profile option values specified at the site-level work as the default until profile option values are specified at the other levels.

This table shows an example of the predefined profile option hierarchy levels and their priorities.

| Level   | Priority                    | Example                                                                  |
|---------|-----------------------------|--------------------------------------------------------------------------|
| Site    | Lowest                      | Currency for a site is set to Euros.                                     |
| Product | Supersedes Site             | Currency for the product or set of products is set to UK pound sterling. |
| User    | Highest, supersedes Product | Currency for a user is set to US dollars.                                |

You can find additional information about profile options in the related topics.

### Related Topics

- [How can I access predefined profile options?](#)
- [Set Profile Option Values](#)

## How can I access predefined profile options?

Search for predefined profile options using the Manage Profile Options task.

1. In the Setup and Maintenance work area, go to the **Manage Profile Options** task.
2. On the page, enter any of the search parameters and click **Search**. Search functionality is case-sensitive.

**Tip:** If you don't know the profile option code or the display name, use the **Application** or **Module** fields to filter search results.

3. In the results, click a profile option to view its details.

## Import Profile Values

Use the Import option on the Manage Administrator Profile Values page to import profile values in bulk and associate them with a profile option.

Before you begin, make sure that the file containing the profile values is available in the document repository of Oracle WebCenter Content.

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task.
2. In the Search: Profile Options section, search for the profile option for which you want to import the values.
3. In the Search Results: Profile Options section, select the profile option.
4. In the <Profile Option>: Profile Values section, click **Actions > Import**.
5. On the Import User Profile Values window, select the WebCenter Content account to which the file was uploaded.
6. Enter the name of the file containing the profile values. The name here must match with the name of the file uploaded to the selected account.
7. Click **Upload**. The profile values are imported.

**Note:** If the import fails, click the link to the log file on the confirmation dialog box and examine the cause of failure.

### Related Topics

- [File Format for Importing Profile Values](#)
- [Import Flexfields, Lookups, or Profile Values Using Web Services](#)
- [How can I bulk update user preferences?](#)
- [Overview of Files for Import and Export](#)

## File Format for Importing Profile Values

You can import profile option values to your application by creating separate text files containing values. You can then upload these files to the Oracle WebCenter Content document repository.

Here are a few things that you need to keep in mind while creating these files:

- Use a vertical bar or pipe ( | ) as a delimiter between fields for both the header and the value rows.
- According to the Oracle WebCenter Content specification, set the file encoding to UTF-8 without the Byte Order Mark (BOM).
- The first line in the file must be a header line, and the files must look exactly the same as shown in the sample file.

To create a file containing the profile values, include the headers specified in this table:

| Header                    | Description                                                                                                                                                                                          |
|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>ProfileOptionCode</b>  | This value displays the profile option code.                                                                                                                                                         |
| <b>LevelName</b>          | This value displays the level name of the profile. It must be one of these level names: <ul style="list-style-type: none"><li>• <b>Site</b></li><li>• <b>Product</b></li><li>• <b>User</b></li></ul> |
| <b>UserName</b>           | This value must correspond to the registered user name in the application. Don't provide any other shortened or coded name of the user.                                                              |
| <b>ProfileOptionValue</b> | This value displays the profile value that you can import.                                                                                                                                           |

Here's a sample file with the header values at the beginning of the file, followed by line entries of the two profile values. For importing several profile values, add more line entries in a similar format.

```
ProfileOptionCode|LevelName|UserName|ProfileOptionValue
AFLOG_BUFFER_MODE|USER|APP_IMPL_CONSULTANT|TEST
AFLOG_LEVEL|USER|APPLICATION_DEVELOPER|FINEST
```

#### Related Topics

- [Import Profile Values](#)
- [Overview of Files for Import and Export](#)
- [Guidelines for File Import and Export](#)
- [Overview of Profile Options](#)

## Lookup Types

### Overview of Lookup Types

Lookup types in the applications provide the lists of values in application fields that are drop-down lists.

For example, when closing an opportunity, salespeople can pick a reason that an opportunity was won or lost from the Win/Loss Reason field, which is a drop-down list. The values in that list are derived from the lookup type, MOO\_WIN\_LOSS\_REASON, which has several potential values known as lookups, each with its own unique lookup code and a meaning that displays in the UI.

### Configuring Lookup Types

You can configure many lookup types to fit your business needs. The level at which a lookup type is extensible determines whether the lookups in that lookup type can be edited. The levels are: User, Extensible, and System.

This table shows which lookup management tasks are allowed at each level:

| Allowed Task           | User | Extensible | System |
|------------------------|------|------------|--------|
| Deleting a lookup type | Yes  | No         | No     |

| Allowed Task                                                   | User | Extensible                                  | System |
|----------------------------------------------------------------|------|---------------------------------------------|--------|
|                                                                |      |                                             |        |
| Inserting new codes                                            | Yes  | Yes                                         | No     |
| Changing the wording that displays on the page (Meaning field) | Yes  | Yes                                         | Yes    |
| Updating start date, end date, and enabled fields              | Yes  | Yes, only if the code isn't predefined data | No     |
| Deleting codes                                                 | Yes  | Yes, only if the code isn't predefined data | No     |
| Updating tags                                                  | Yes  | No                                          | No     |
| Updating module                                                | Yes  | No                                          | No     |

If a product depends on a lookup type, the configuration level must be System or Extensible to prevent deletion. After the configuration level is set for a lookup type, it can't be modified. The configuration level for lookup types created using the Define Lookups page is by default set at User level.

## Sales Lookup Types

You find lookup types by accessing the associated task in the Sales offering in the Setup and Maintenance work area. Here are some of the common sales lookup tasks or task lists:

To access sales lookup types:

1. Sign in as a setup user and navigate to the Setup and Maintenance work area.
2. In Setup and Maintenance, go to the Sales offering.
3. In the list of functional areas, click the area where the lookup appears. See the list at the end of this procedure for more information.  
A list of tasks for the area is displayed.
4. In the list of tasks, click the lookups task.
5. In the lookup types page, modify the lookup type as needed.

Here are the Sales lookup type tasks and the functional areas where they appear:

- Sales Foundation functional area:
  - Manage Geography Lookups
  - Manage Applications Core Standard Lookups
  - Manage Activity Standard Lookups
- Users and Security functional area:
  - Manage Resource Role Lookups
  - Manage Resource Lookups

- Accounts and Contracts functional area
  - Manage Group Lookups
  - Manage Source System Lookups
  - Manage Hierarchy Lookups
  - Manage Trading Community Common Lookups
  - Manage Party Usage Lookups
  - Manage Relationship Lookups
  - Manage Contact Point Lookups
  - Manage Trading Community Organization Lookups
  - Manage Trading Community Location Lookups
  - Manage Trading Community Person Lookups
  - Manage Contact Lookups
  - Manage Customer Account Lookups
  - Manage Customer Center Lookups
- Sales Catalog and Products functional area:
  - Manage Product Group Lookups
- 
- Leads functional area:
  - Manage Sales Lead Standard Lookups
  - Manage Set Enabled Lookups
- Opportunities functional area:
  - Manage Set Enabled Lookups
- Territories functional area:
  - Manage Territory Management Non-extensible Lookups
- Business Plans functional area:
  - Manage Business Plan Non-extensible Lookups
  - Manage Objectives Non-extensible Lookups
- Partners functional area:
  - Manage Partner Lookups

## Set-Enabled Lookup Types

Several applications support lookup types at the reference set level, allowing you to present different lists of values for different business units. You can find these in the Manage Set Enabled Lookups task within the functional area that supports these lookup types.

#### Related Topics

- [How can I access predefined lookups?](#)
- [Why can't I see my lookup types?](#)
- [Reference Data Sets](#)

## How can I access predefined lookups?

Search for predefined lookups using any of the manage lookups tasks.

1. In the Setup and Maintenance work area, go to any of the following tasks that contains the lookups you're looking for:
  - Manage Standard Lookups
  - Manage Common Lookups
  - Manage Set-enabled Lookups
2. Enter any of the search parameters and click **Search**. If you don't know the lookup type or the meaning, use the **Module** field to filter search results.
3. Click a lookup type to view its lookup codes.

**Tip:** Click the Query By Example icon to filter the lookup codes.

#### Related Topics

- [Use Query By Example](#)
- [How do I update existing setup data?](#)

## How can I edit lookups?

On any of the Manage Lookups pages, you can edit the existing lookup codes of a lookup type or add new lookup codes. You can edit lookups using the following tasks in the Setup and Maintenance work area:

- Manage Standard Lookups
- Manage Common Lookups
- Manage Set Enabled Lookups

Each task contains a predefined set of lookup types that are classified and stored. Open a task to search and edit the required lookup. However, you may not be able to edit a lookup if its configuration level doesn't support editing.

## Why can't I see my lookup types?

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Geography Lookups. Each task gives you access only to certain lookup types.

However, the generic tasks provide access to all lookups types of a kind, such as common lookups associated with the Manage Common Lookups task. If the lookup types in an application are available in the standard, common, or set-enabled lookups view, they're central to an application. However, lookup types defined for a specific application are managed using the task for that application.

## Import Lookups

On each page pertaining to the tasks of managing the Standard, Common, and Set Enabled lookups, use the Import option to import the lookup type and lookup code information.

### Prerequisite

The separate files containing the lookup types and lookup codes are already available in the document repository of Oracle WebCenter Content.

### Importing Lookups

To import lookups:

1. In the Setup and Maintenance work area, go to the Manage Standard Lookups task. Depending on the lookup you want to import, you may select the other lookup tasks.
2. In Search Results, from the Actions menu, select **Import**.

The Import Lookups dialog box appears.

3. Select the WebCenter Content account to which the files were uploaded.
4. Enter the names of the separate files containing the lookup type and lookup code information. The names here must match with the names of the files uploaded to the selected account.
5. Click **Upload**. The lookup details are imported.

**Note:** If the import fails, click the link to the log file on the confirmation dialog box and examine the cause of failure.

#### Related Topics

- [File Format for Importing Lookups](#)
- [Import Flexfields, Lookups, or Profile Values Using Web Services](#)

## File Format for Importing Lookups

You can import lookups to your application by creating separate text files containing lookup types and lookup codes. You can then upload these files to the Oracle WebCenter Content document repository.

Here are a few things that you need to keep in mind while creating these files:

- Use a vertical bar or pipe ( | ) as a delimiter between fields for both the header and the value rows.
- According to the Oracle WebCenter Content specification, set the file encoding to UTF-8 without the Byte Order Mark (BOM).



- The first line in the file must be a header line, and the files must look exactly the same as shown in the sample file.

The following sections contain details about the specific lookup types and codes.

## Prerequisite

You must have worked with lookups in Oracle Fusion Cloud applications.

## Standard and Common Lookups

The lookup types and codes are similar for standard and common lookups. To create a file containing the lookup types, include the following headers:

| Header             | Description                                                     | Required or Optional |
|--------------------|-----------------------------------------------------------------|----------------------|
| <b>LookupType</b>  | This value displays the lookup type.                            | Required             |
| <b>Meaning</b>     | This value displays the name of the lookup type.                | Required             |
| <b>Description</b> | This value displays the description of the lookup type.         | Optional             |
| <b>ModuleType</b>  | This value displays the module associated with the lookup type. | Required             |
| <b>ModuleKey</b>   | This value displays the module code.                            | Required             |

Here's a sample file with the header values at the beginning of the file, followed by line entries of the two lookup types. For importing several lookup types, add more line entries in a similar format.

```
LookupType|Meaning|Description|ModuleType|ModuleKey
AFLOG_22APR_1|Log1|AFLOG_desc_1|APPLICATION|FND
PROD_22APR_2|Product1|PROD_desc_2|APPLICATION|FND
```

To create a file containing the lookup codes, include the headers specified in this table:

| Header                 | Description                                                                                                                                                                                                                               | Required or Optional |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| <b>LookupType</b>      | This value displays the lookup type.                                                                                                                                                                                                      | Required             |
| <b>LookupCode</b>      | This value displays the lookup code associated with the lookup type.                                                                                                                                                                      | Required             |
| <b>DisplaySequence</b> | This value displays the sequence in which the lookup code appears in the list of values.                                                                                                                                                  | Required             |
| <b>EnabledFlag</b>     | This value lets you enable or disable the display status of the lookup code: <ul style="list-style-type: none"><li>• Y: Enable the display status of the lookup code</li><li>• N: Disable the display status of the lookup code</li></ul> | Required             |
| <b>Meaning</b>         | This value displays the name of the lookup code.                                                                                                                                                                                          | Required             |

| Header                   | Description                                                                                                                                   | Required or Optional |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| <b>StartDateActive</b>   | This value displays the beginning of the date range during which the lookup code is active and visible on the page. The format is dd/MM/yyyy. | Optional             |
| <b>EndDateActive</b>     | This value displays the end of the date range during which the lookup code is active and visible on the page. The format is dd/MM/yyyy.       | Optional             |
| <b>Description</b>       | This value displays the description of the lookup code.                                                                                       | Optional             |
| <b>Tag</b>               | This value indicates any tag associated with the lookup code that you can use for a quick reference or retrieval of information.              | Optional             |
| <b>Seg</b>               | This value displays the API name used for a global segment that you can define for the descriptive flexfield associated with the lookup.      | Optional             |
| <b>CONTEXT_ATTRIBUTE</b> | This value displays the context value specified in the CSV file for a particular descriptive flexfield.                                       | Optional             |
| <b>ctxSeg</b>            | This value displays the name of the API for a context-sensitive segment defined for a context attribute.                                      | Optional             |

Here's a sample file that contains two lookup codes:

```
LookupType|LookupCode|DisplaySequence|EnabledFlag|StartDateActive|EndDateActive|Meaning|Description|Tag|Seg|
CONTEXT_ATTRIBUTE|ctxSeg
TASK_22APR_1|Code1_1|1|Y|25/12/2014|25/5/2015|TASK_22apr_1|Task_desc_1|Tag1_1|testSeg1|TEST_CTX1|ctx1Seg1
TASK_22APR_1|Code1_2|2|N|25/1/2014|25/11/2015|TASK_22apr_2|Task_desc_2|Tag1_2|testSeg1|TEST_CTX1|ctx1Seg1
TASK_22APR_2|code2_1|3|N|25/12/2012|25/7/2015|TASK_22qpr_2_1|Task_desc_2|tag2_1|testSeg2|TEST_CTX2|ctx2Seg2
TASK_22APR_2|code2_2|3|Y|25/12/2012|25/7/2015|TASK_22qpr_2_2|Task_desc_2_2|tag2_2|testSeg2|TEST_CTX2|
ctx2Seg2
```

## Set Enabled Lookups

To create a file containing the set enabled lookup types, include the headers specified in this table:

| Header                    | Description                                                                               | Required or Optional |
|---------------------------|-------------------------------------------------------------------------------------------|----------------------|
| <b>LookupType</b>         | This value displays the lookup type.                                                      | Required             |
| <b>Meaning</b>            | This value displays the name of the lookup type.                                          | Required             |
| <b>Description</b>        | This value displays the description of the lookup type.                                   | Optional             |
| <b>ModuleType</b>         | This value displays the module associated with the lookup type.                           | Required             |
| <b>ModuleKey</b>          | This value displays the module code.                                                      | Required             |
| <b>ReferenceGroupName</b> | This value displays the name of the reference group that contains the reference data set. | Required             |

Here's a sample that contains two set enabled lookup types:

```

LookupType|Meaning|Description|ModuleType|ModuleKey|ReferenceGroupName
CODE_22APR_1|CODE_22apr_1|Code_desc_1|APPLICATION|FND|BU_APAC
CODE_22APR_2|CODE_22qpr_2|Code_desc_2|APPLICATION|FND|BU_APAC

```

To create a file containing the set enabled lookup codes, include the headers specified in this table:

| Header                 | Description                                                                                                                                                                                                             | Required or Optional |
|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| <b>LookupType</b>      | This value displays the lookup type.                                                                                                                                                                                    | Required             |
| <b>LookupCode</b>      | This value displays the lookup code associated with the lookup type.                                                                                                                                                    | Required             |
| <b>DisplaySequence</b> | This value displays the sequence position at which the lookup code appears in the list of values.                                                                                                                       | Required             |
| <b>EnabledFlag</b>     | This value lets you enable or disable the option to view the display: <ul style="list-style-type: none"> <li>Y: Enable the option to view the display</li> <li>N: Disable the option to not view the display</li> </ul> | Required             |
| <b>Meaning</b>         | This value displays the name of the lookup code.                                                                                                                                                                        | Required             |
| <b>SetName</b>         | This value displays the name of the reference data set.                                                                                                                                                                 | Required             |
| <b>StartDateActive</b> | This value displays the beginning of the date range during which the lookup code is active and visible on the page. The format is dd/MM/yyyy.                                                                           | Optional             |
| <b>EndDateActive</b>   | This value displays the end of the date range during which the lookup code is active and visible on the page. The format is dd/MM/yyyy.                                                                                 | Optional             |
| <b>Description</b>     | This value displays the description of the lookup code.                                                                                                                                                                 | Optional             |
| <b>Tag</b>             | This value indicates any tag associated with the lookup code that you can use for a quick reference or retrieval of information.                                                                                        | Optional             |

Here's a sample file with the header values at the beginning and lists four set enabled lookup codes. For importing several lookup codes, add more entries in the same format.

```

LookupType|LookupCode|DisplaySequence|EnabledFlag|StartDateActive|EndDateActive|Meaning|Description|Tag|
SetName
DATA_22APR_1|Code1_1|1|Y|25/12/2014|25/5/2015|DATA_22apr_1|Data_desc_1|Tag1_1|TEST SET CODE 2
DATA_22APR_1|Code1_2|2|N|25/1/2014|25/11/2015|DATA_22apr_2|Data_desc_2|Tag1_2|TEST SET CODE 3
DATA_22APR_2|code2_1|3|N|25/12/2012|25/7/2015|DATA_22qpr_2_1|Data_desc_2|tag2_1|TEST SET CODE 2
DATA_22APR_2|code2_2|3|Y|25/12/2012|25/7/2015|DATA_22qpr_2_2|Data_desc_2_2|tag2_2|TEST SET_ERR_CODE_Z

```

#### Related Topics

- [Import Lookups](#)
- [Overview of Files for Import and Export](#)
- [Guidelines for File Import and Export](#)
- [Overview of Lookups](#)

# Scheduled Processes

## What are scheduled processes?

Scheduled processes do tasks that are too complex or time-consuming to do manually, for example importing data or updating many records. You can run scheduled processes on a recurring schedule and send notifications based on how the process ends.

Some scheduled processes give you printable output. Those processes might have **Report** in their name.

Use the Scheduled Processes work area to run all the processes you've access to and to manage submissions. If you need access to this work area, ask your security administrator to assign you a role that gives you access, for example a custom role with the the Manage Scheduled Processes (FND\_MANAGE\_SCHEDULED\_PROCESSES\_PRIV) privilege. Other than the Scheduled Processes work area, you might be also able to run certain processes from other work areas.

## Jobs and Job Definitions

Each scheduled process that you run is based on a job. The job is the executable that controls what the process does. Each job needs a job definition, which, for example, identifies the parameters and other options you've set for the process. You or your administrator can create job definitions for Oracle Analytics Publisher reports so that users can run the reports as scheduled processes.

## Process Sets

A process set is a scheduled process that contains multiple processes or even other process sets. So, when you submit a process set, you're running more than process.

**Note:** When you submit certain scheduled processes, the job logic causes other processes to automatically run. But in this case, you're not submitting a process set that includes those other processes.

## Submission

When you submit a scheduled process, you can use its parameters to control how, and which records are processed. For example, a process includes only the transactions that were edited by the person you select for a Last Updated By parameter. Some scheduled processes don't have parameters.

As part of the submission, you can also set up a schedule for the process, for example to run once a week for two months. Every time a process runs, there's a unique process ID.

## Output

Some scheduled processes provide output in PDF, HTML, and other formats. For example, a process can import records and also produce output with details about those records. There are many types of output, for example a tax document or a list of transactions.

## Where to Find Information About Oracle Sales Scheduled Processes

Here are the scheduled processes that are available as part of Oracle Sales. The Oracle Understanding Scheduled Processes guide describes many of these scheduled processes and contains guidance on how to use them.

However, some CX Sales scheduled processes are documented within the context of procedures that require them, in the relevant implementation or administration guides.

### Assignment

- *Improve the Performance for Territory-Based Account Assignment*
- *Perform Object Sharing Rule Assignment Processing*
- *Refresh Access Control Data*
- *How do I request account assignment?*
- *Request Opportunity Resource Assignment*
- *Request Revenue Territory Assignment*
- *Run Access Group Membership Rule*

### Forecasting

- *Check Due Date*
- *Forecast Autopilot*
- *Refresh Forecast*

### Marketing Campaigns and Leads

- *Populate Lead Latitude and Longitude Information*

### Partner Management

- *Partner Program Enrollment Expiration Job*
- *Refresh Partner Dimension Members*

### Quota Management

- *Publish or Revise Hierarchy Quotas*
- *Synchronize Quotas*

### Sales Insights

- *Generate Sales Insight Facts*
- *Generate Sales Insight Facts Using Signals*

- *Generate Sales Insight Metrics*
- *Purge Redundant Sales Insight Facts*

## Sales Products

- *Import Sales Products Process*

## Territories

- *How do I delete a territory proposal?*
- *Refresh and Promote Dimension Members*
- *Refresh Territories from Resources*
- *Update Inheritance Recipients*

You can find more information about scheduled processes in the *Understanding Scheduled Processes* guide.

## View Details About Predefined Scheduled Processes

To use web services to run predefined scheduled processes, you require details about the processes. View job definitions that the processes are based on, for example to get information about parameters.

You might also need to find security requirements for running the scheduled process.

## Job Definitions

A job definition contains the metadata that determines how a scheduled process works and what options are available during submission.

To view job definitions:

1. Go to the Setup and Maintenance work area.
2. From the Application Extensions functional area, open any of these tasks as appropriate:
  - Manage Enterprise Scheduler Job Definitions and Job Sets for Financial, Supply Chain Management, and Related Applications
  - Manage Enterprise Scheduler Job Definitions and Job Sets for Human Capital Management and Related Applications
  - Manage Enterprise Scheduler Job Definitions and Job Sets for Customer Relationship Management and Related Applications
3. In the Manage Job Definitions tab, select your job definition and click **Edit**.

**Note:** Predefined job definitions are marked with an asterisk.

4. Cancel after you get the information you need.

## Security

Privileges provide the access required to run specific scheduled processes. Privileges are granted to duty roles, which are granted to job roles. To see which job roles inherit the required privileges, use the Security Console or the security reference manuals for the appropriate product family.

# 4 Users and Security

## Overview of Setting Up Users and Security

Since you followed the *Implementing Sales* guide steps to set up your initial set of users, then you already know that Oracle applications use a role-based access control security model to secure access to functionality and data.

In a role-based access control security model, users are assigned roles, and roles are assigned access privileges to protected system resources.

Sales and Service users who access the transactional UI, for example sales representatives or service representatives working in leads or service requests, are created as resources and are known as resources.

### Default Preferences

To set up default preferences for users and roles, access the Security Console as a setup user or other user with the IT Security Manager job role. Only setup users, or other users with the IT Security Manager job role, can access the Security Console. See the *Securing Fusion Sales and Service* guide for more information.

### User Identity Store

The Lightweight Directory Access Protocol (LDAP) identity store is a repository of user identity data. Your LDAP directory stores definitions of LDAP user accounts. In general, changes you make to user accounts are automatically synchronized between the sales application and your LDAP directory server. However, you must also run processes on a daily basis to manage the information exchange between your application and the LDAP directory server. For information, see the chapter about setting up application security in the *Securing Fusion Sales and Service* guide.

### Setup Tasks in the UI and Other Setup Options

As a setup user, you use multiple different tasks in Setup and Maintenance to create and maintain users. You also have additional setup options to consider. The following table describes these tasks and setup options.

| Setup Task or Option and Navigation                                                                                        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manage Job Roles Task<br><br>Navigation: Setup and Maintenance<br>> Sales Offering > Users and Security<br>functional area | Oracle provides many predefined job roles. The relevant sales roles are listed in the <i>Implementing Sales</i> guide.<br><br>You perform the Manage Job Roles task to: <ul style="list-style-type: none"><li>• Review the role hierarchy of a job or abstract role.</li><li>• Create custom job and abstract roles.</li><li>• View the roles assigned to a user and list the users who have a specific role.</li></ul> This task opens the Roles tab of the Security Console. |
| Manage Duties Task<br><br>Manage Sales and Service Access<br>Management Task                                               | You perform the Manage Duties task to: <ul style="list-style-type: none"><li>• Review the duties of a job or abstract role.</li></ul>                                                                                                                                                                                                                                                                                                                                          |

| Setup Task or Option and Navigation                                                                                                                                              | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Navigation: Setup and Maintenance<br>> Sales Offering > Users and Security functional area                                                                                       | <ul style="list-style-type: none"> <li>Manage the duties of a custom job or abstract role.</li> <li>Create custom duty roles.</li> </ul> <p>This task opens the Roles tab of the Security Console.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Manage Data Security Policies Task<br><br>Manage Sales and Service Access Task<br><br>Navigation: Setup and Maintenance<br>> Sales Offering > Users and Security functional area | <p>You use the Manage Data Security Policies task to manage the data security policies that determine grants of entitlement to a user or role on an object or attribute group. This task opens the Roles tab of the Security Console.</p> <p>You can also use the Manage Sales and Service Access task to review and configure data security. This task opens the Sales and Service Access Management work area. For information, see the <a href="#">Securing Fusion Sales and Service</a> guide.</p>                                                                                                                                                                                                                                            |
| Manage Users Task<br><br>Navigation: Navigator > Users and Roles item or Setup and Maintenance > Sales Offering > Users and Security functional area                             | <p>You create application users in the UI using the Manage Users task. A user with the IT Security Manager job role performs the Manage Users tasks.</p> <p><b>Note:</b><br/>You can also create sales users by importing users. For information on the user import options available, see the <a href="#">Understanding Import and Export Management for Fusion Sales and Service</a> and <a href="#">Implementing Sales</a> guides.</p>                                                                                                                                                                                                                                                                                                         |
| Manage HCM Role Provisioning Rules Task<br><br>Navigation: Setup and Maintenance Sales Offering > Users and Security functional area                                             | <p>Oracle provides predefined role mapping rules for provisioning many of the standard job roles included with the application. However, using the Manage HCM Role Provisioning Rules task, you can create any additional role mappings you need to, to control the provisioning of roles to application users. For example, you can create a role mapping to provision the Channel Sales Manager role automatically to specific sales managers.</p>                                                                                                                                                                                                                                                                                              |
| Import and Export Management                                                                                                                                                     | <p>You can import users in bulk using data files. For information on the user import options available, see the <a href="#">Understanding Import and Export Management for Fusion Sales and Service</a> and <a href="#">Implementing Sales</a> guides.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Import Partner Users Task                                                                                                                                                        | <p>You can also import partner contact data using the Import Partner Users task. For more information, see the <a href="#">Getting Started with Your Partner Relationship Management Implementation</a> guide.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Single Sign-On Authentication                                                                                                                                                    | <p>Single sign-on authentication is optionally available for user authentication. If your enterprise has moved from a traditional on-premises environment to an Oracle Cloud implementation, you might want to use your existing identity management solution for authenticating your employees, and you might also want to provide a single sign-on experience. Implementing federated single sign-on lets you provide users with single sign-on access to applications and systems located across organizational boundaries. For additional information, see Oracle Applications Cloud Service Entitlements (Doc ID 2004494.1) on <a href="#">My Oracle Support</a> at <a href="https://support.oracle.com">https://support.oracle.com</a>.</p> |
| Resetting User Passwords                                                                                                                                                         | <p>Setup users provisioned with the IT Security Manager job role can use the Users tab in the Security Console work area to reset passwords for all application users. Users who can't access the Security Console can reset only their own passwords using the Set Preferences link in the Settings and Actions menu available by clicking their user name in the application or by using the Forgot Password link on the sign-in page. See the <a href="#">Implementing Sales</a> guide for more information.</p>                                                                                                                                                                                                                               |
| Updating Email Addresses                                                                                                                                                         | <p>Use the Users tab in the Security Console work area to change user email addresses. You can use the procedure described in this topic to update addresses of both setup users and sales users. If you're updating the email addresses of sales users, then you can also use the same import process you use to create them. See the <a href="#">Implementing Sales</a> guide for more information.</p>                                                                                                                                                                                                                                                                                                                                         |



**Note:** Other data security tasks listed in the Users and Security functional area task list don't apply to the sales applications. Follow the guidance in the *Implementing Sales* and *Securing Fusion Sales and Service* guides.

#### Related Topics

- [Set General Preferences for All Users](#)
- [Subject Areas for Adoption and Usage Reporting](#)

## About the Sales Administrator

A user with the Sales Administrator job role performs most setup tasks related to sales the sales applications.

Although he doesn't participate directly in the sales process, you create the sales administrator user as a sales resource and employee in the organization hierarchy. For more information, see the *Overview of Creating Sales Users* topic in the *Implementing Sales* guide.

Here are the tasks the sales administrator user typically performs:

- Download task lists and setup reports.
- Set sales profile options.
- Configure extensible lookups for sales.
- Run most of the scheduled processes for sales.
- Configure pages in Application Composer and Page Composer.
- Set up the sales calendar.
- Set up accounts and contacts options.
- Manage global search options.
- Function as a centralized territory administrator.
- Configure opportunities.
- Configure forecast criteria.
- Administer sales quotas.
- Configure work assignment.
- Manage price books.
- Create and manage sales products and promotions.
- Set up and administer the sales catalog.
- Set up mobile applications.
- Set up partner functionality.
- Perform configuration tasks.
- Perform data import and export.
- Add and configure sales infolet pages.
- Add analytics to application pages, such as accounts, leads, and opportunities.
- Add analytics to the Analytics page.

- Create analytics in business intelligence (BI).
- Edit analytics in BI.

**Note:** The sales administrator doesn't have the same setup permissions as a setup user. He has permissions required to set up and administer sales features and components, but not the higher-level permissions required to implement enterprise and security features.

You can find more information about user setup in the related topics.

#### Related Topics

- [Enable Sales Administrators to Test Configurations in the Sandbox](#)
- [User Setup Options](#)

## Discard Domain Emails

During an implementation, you set up users and test business flows that trigger automatic emails. During this stage of setup, you probably don't want emails being sent to real users, so you can simply use discard email domains that Oracle has made available.

### Discard Email Domains

Oracle recommends that you don't use fictitious email addresses, because this causes email bounces. Fictitious emails generally take three forms:

- An incorrect user identifier at a valid domain
- A random domain
- A domain that doesn't exist

Using fictitious email addresses can have numerous negative consequences, including unintentionally sending email to a real person or damaging the reputation of the IP address that sends out the email, potentially flagging it as a sender of spam. For example, you might send an email to `tina.best@ssf.com`, thinking that `ssf` is just a random alphabetic sequence and not an actual domain. However, your email is actually sent to the Spruce Street Foods (`ssf.com`). The Spruce Street Foods email server must then determine if there is a valid recipient and, if not, make a reputation decision about the sender's IP address.

To avoid these undesirable conditions, Oracle has established email domains in each of its data centers that you can use temporarily during setup. Any email sent from Oracle cloud applications to one of the discard domains doesn't leave the data center. Instead, it's discarded by the mail servers during the send process. You can turn any recipient address into a discard address by replacing the domain information with one of the discard domains. So, in the example presented here, we might use `tina.best@discard.mail.us1.cloud.oracle.com`.

Here are the discard domains and the data centers that they're associated with:

| Discard Domain                     | Data Center |
|------------------------------------|-------------|
| @discard.mail.us1.cloud.oracle.com | Austin      |

| Discard Domain                     | Data Center |
|------------------------------------|-------------|
|                                    |             |
| @discard.mail.us2.cloud.oracle.com | Chicago     |
| @discard.mail.us6.cloud.oracle.com | Ashburn     |
| @discard.mail.ca2.cloud.oracle.com | Markham     |
| @discard.mail.ca3.cloud.oracle.com | Calgary     |
| @discard.mail.ap1.cloud.oracle.com | Sydney      |
| @discard.mail.ap2.cloud.oracle.com | Singapore   |
| @discard.mail.em1.cloud.oracle.com | Linlithgow  |
| @discard.mail.em2.cloud.oracle.com | Amsterdam   |
| @discard.mail.em3.cloud.oracle.com | Slough      |
| @discard.mail.em4.cloud.oracle.com | Frankfurt   |
| @discard.mail.em5.cloud.oracle.com | Munich      |

Discard domains cross data center boundaries. You can use any of them, no matter which data center supplies your service. Oracle provides data center-specific domains in case you're concerned about geopolitical boundaries and want to ensure that discard data remains in your data center region.

Discard domains are also available for government and defense data centers. For details on these restricted data centers, log a service request for cloud operations through [My Oracle Support](#).

If you're importing your users, you can use the discard domains in your import file and then go back later and re-import the users with the real domain information. For more information on importing users, see the [Overview of Sales User Import](#) topic in the [Implementing Sales](#) guide.

## Restricted Users

### Sales Restricted Users

You can create sales application users who have extensive privileges to view sales data, but limited privileges to change data, by provisioning users with the Sales Restricted User job role.

## Access Provided by the Sales Restricted User Job Role

To do their jobs effectively, users must be able to view all the data that's relevant to their role in the enterprise. But not all users also require the ability to create, update, or delete that data. Users assigned the Sales Restricted User job role can:

- View accounts, contacts, leads, and opportunities.
- Create and modify reports and analytics.
- Update, create, and manage service requests.
- Create, update, and delete notes, tasks and activities for the Activity object.
- Edit forecasts.
- Access content in Oracle Sales Lightbox.

Assigning the Sales Restricted User job role to the following types of users provides these users with the visibility into sales data that they require, without assigning them excess privileges:

- Back-office users can view reports, edit forecasts, and view activities and interactions.
- Service representatives can view all the information available for a customer and can see leads and opportunities.
- Seasonal or administrative users can view leads and opportunities.

For additional information about creating restricted sales users, see the topic, *How do I create sales restricted users?*.

**Note:** Some users may require read-only access to application data but don't need any data update privileges. For example, an auditor who reviews application data for regulatory reasons but isn't authorized to change anything. You can assign read-only access to individual users using the Read Only Mode (FND\_READ\_ONLY\_MODE) profile option. For information on how to configure this access for a user, see the topic, *Provide Read-Only Access for Individual Users*.

## How do I create sales restricted users?

You can create sales application users who have extensive privileges to view sales data, but limited privileges to create, update, or delete that data, by assigning users the Sales Restricted User job role.

For example, you might want to assign the Sales Restricted User job role to accounting or legal users, to seasonal or administrative users, or to users who are assigned an Essential User license. The Essential User license provides a user with a read-only subscription to the cloud service.

Use these steps to create a sales restricted user.

1. Create the user who's to have restricted access to the application.

For information about this task, see the topic, *How do I create application users?*.

2. When creating the user, specify these values.

| Field         | Value                 |
|---------------|-----------------------|
| Person Type   | Employee              |
| Resource Role | Sales Restricted User |

3. In the Roles region, click **Autoprovision Roles**.

The user is automatically assigned the following roles:

- Sales Restricted User job role
- Resource abstract role
- Employee abstract role

A predefined rule automatically assigns the Employee abstract role to all active users who are created as employees.

## Records Transfer Between Users

### About Transferring Records Between Users

Mass transfer of records lets you move records from one user to another. A record owner or any user higher than the owner in the role or territory hierarchy can transfer records from one user to the other.

Before transferring records, you must understand:

- Record Types
- Record Filters
- Record Transfer Status

#### Record Types

Record types are broad categories of objects or information related to a user. For example, Deal Registrations associated with a user. Currently, you can mass transfer Leads, Opportunities, Deal Registrations, and all custom objects excluding the vertical custom object that belong to a user. You can't mass transfer Accounts and Contacts.

#### Record Filters

Record filters let you refine the list of records associated with the user for a record type. For example, you can transfer only deal registrations that were created during a time period. You can't specify filters for all record type. The Transfer Records: Define Filters page lets you view the record types that allow filtering, and specify the record filters.

## Record Transfer Status

Record transfer statuses appear in the Mass Transfer Status page and show the status of transfer jobs. The Mass Transfer processes records to ensure data integrity before transferring the records from a user to the other.

A Record Transfer job can have one of these statuses:

- In Progress: Transfer job is currently in process.
- Completed: Transfer job has been completed without errors.
- Errors: Transfer job has resulted in an error.

You can click on the transfer job name to view the record types that were transferred, the status of each record type, and the log file associated with a record type.

## Transfer Records Between Users

This procedure describes how you can transfer records from one user to the other using the Mass Transfer tool.

To transfer records from one user to another:

1. Navigate to Mass Transfer from the Tools menu.
2. In the Mass Transfer Status page, click **Transfer Records**.
3. In the Transfer Records: Select Owners and Records page, search for the current owner and the new owner of the records. For example, if you're transferring from Adam Smith to Samantha Hayes, then select Adam Smith as the current owner and Samantha Hayes as the new owner.
4. Select the types of records you want to transfer. For example, if you're transferring opportunities and leads, then select Opportunities and Sales Leads.

The Transfer Details column lists the types of records that will be transferred.

5. Click **Next**.

In the Transfer Records: Define Filters page, you specify filters for record types you have selected. For example, you can specify the start and close dates for opportunities to transfer the opportunities that were closed during a specified period of time.

6. Select a record type to view the filters available, and specify the filters.
7. Click **Submit**.
8. Click **Yes** in the confirmation dialog box.

The Mass Transfer Status page lists the recent mass transfer jobs and their statuses.

# 5 Sales Resources, Roles, and Organizations

## Overview of Managing Resources

Managing resources involves viewing and modifying a resource's profile, organization membership, role assignment, skills, additional contact information, and salesperson information.

All the resources within the deploying company can view any resource's profile. However, only the administrator can modify a resource's profile, organization and team membership, and role assignment. Managers can modify the skill information of their direct and indirect reports. However, resources can only modify their own profiles, skills, and additional contact information.

### Manage Resource Profiles

Resource profile management involves managing a user's profile, including the resource's core skills, photo, time zone, additional contact information, and so on. As part of managing a resource's profile, the administrator specifies the dates between which the resource is available to the organization. The administrator also ensures that role assigned to the resource is within the period mentioned in the profile.

### Manage Organization Membership

At any point in time, a resource belongs to an organization, and the administrator can assign this resource to any other organization within the deploying company.

### Manage Resource Role Assignment

An administrator or an organization manager can assign or modify resource roles within an organization, with one role assigned to a resource at a time. However, administrators can also assign multiple roles to resources outside an organization.

#### Note:

- The dates of the resource role assignment must be within the date range during which the resource is active in the deploying organization.
- An organization can have only one manager.

### Configure Extensible Resource Pickers

Administrators can configure extensible resource pickers that let sales users search and associate users with business objects relevant to their business flows. For more information about configuring the resource search, see the related topics.

### Related Topics

- [Overview of Configuring Resource Search](#)
- [Configure Resource Search](#)
- [Frequently Asked Questions \(FAQs\) for Resources](#)

## How do I enable desktop pages for Resource Directory?

You can use the Resource Directory to view all the resources within your organization. You can also use the Resource Directory to find and communicate with other resources, and to network and collaborate with them.

You can access the Resource Directory using the following path: **Navigator > Resource Directory**. You can also perform some of the functions of the resource directory using the Manage Resources setup task.

You use the Resource Directory to perform the following tasks:

- View and modify your profile
- View your organization information
- View information related to other organizations
- View the profiles of other resources
- Communicate with other resources

**Note:** If you are unable to find a party record in the Resource Directory, run the Synchronize Person Records scheduled process. For more information, see the Implementing Global Human Resources guide.

**Note:** You can set the profile option HZ\_RESOURCE\_ALLOW\_CUSTOMIZATION to Yes to enable desktop pages for Resource Directory in Application Composer. The default value of this profile option is No.

## Make an Employee a Sales Resource

An employee must be a sales resource before they can be assigned to any role or be added to any organization.

After making an employee as a sales resource, you can manage the resource's organization membership, add or remove skills of the resource, provide contact information, and so on. If you have an employee who needs to be a sales resource, perform these steps:

1. Navigate to the **Resource Directory**.
2. Click **Identify Resources** in the **Tasks** region.
3. On the Identify Resources page, fill in the Person Name or Registry ID. You don't need to enter the complete name. The application automatically searches for any characters entered, even if it's only a single character.
4. Select **Employee** as the Usage and click **Search**.
5. Select the employee and click **Add as Resource**.
6. Click **OK** on the confirmation message.



The employee is now also a sales resource.

7. On the Add Resource Information page, in the Resource Details section, specify dates for the resource.
8. Select the **Organization** and the **Role** that you want to assign to the resource.
9. Optionally, in the Sales Person Information section, specify additional information about the resource.
10. Click **Save and Close**.

#### *Related Topics*

- [About Resource Role Assignment](#)
- [About Transferring Records Between Users](#)
- [Create Additional Resource Roles](#)
- [How do I change user resource roles when job assignments change?](#)
- [Designate Proxies](#)
- [Impersonation Audit](#)
- [Configure Impersonation Auditing](#)

## How to Enable the Skill and Qualification Tabs on Resource Pages

You can use the Skills and Qualifications tabs in the resource page to record the skills and qualifications of a resource.

By default, the Skills and Qualifications tabs aren't displayed in the resource pages. To display the tabs, you must set the profile value of the Resource Detail Page Enabled (ORA\_HZ\_RES\_ENABLE\_SKILLS) profile option to Yes.

Here's how you set the profile option and then view the tabs:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. Search ORA\_HZ\_RES\_ENABLE\_SKILLS profile option code.
3. Change the Profile Value to Yes.
4. Click Save and Close.
5. Click **Navigator > Resource Directory**.
6. Select a resource and click **Actions > View Resource Details**.

The Skills and Qualifications tabs are enabled.

# Examples of Updating Resource Skills and Qualifications

This example illustrates the various contexts in which you can update your skills and qualifications in Oracle Resource Management.

You can add a wide range of skills and qualifications into Oracle Resource Management. For the sake of convenience, let's categorize these into core skills, achievements, and mandatory requirements.

Each of these skills must be used in specific contexts as described in the following scenarios.

## Update Core Skills

Skills that reflect your key abilities are categorized under the Core Skills head, such as competencies, degrees, languages, licenses and certifications, skills, and problem codes.

- Use the Competencies option to record your key abilities as a resource. For instance, if you have the ability to quickly internalize and analyze complex information, list it here.
- Use the Degrees option to record your educational degrees.
- Use the Languages option to record your proficiency with the various languages you know.
- Use the Licenses and Certifications option to record any educational licenses and certifications you may have received. For instance, if you have a Six Sigma certification, list it here.
- Use the Skills option to list out any specific software or engineering skills you may have. You can search for these skills by category, product, platform, or component.
- Use the Problem Codes option to record your ability to manage and remedy specific service-related problems that may arise within your company. For instance, if you're skilled at troubleshooting hardware issues, list it here.

## Update Achievements

Skills that reflect your key achievements and uncommon abilities are categorized under the achievements head, such as accomplishments, honors, awards.

- Use the Accomplishments option to record any major task you completed that reflects your abilities as an individual. For instance, if you completed a rather difficult task in a short deadline, list it here.
- Use the Honors and Awards option to record any special honors or awards you may have received. For instance, if you were the recipient of a certificate of merit award, list it here.

## Update Mandatory Requirements

Skills that capture the mandatory requirements, which you have met for your employment, are categorized under the mandatory requirements head. Thus, job requirements and work requirements are part of mandatory requirements.

- Use the Job Requirements option to update all job requirements you have met. For instance, many companies require you to take a medical test before you join. If you took such a test before you joined the company, list it here.

- Many roles have specific requirements that employees must fulfill before these roles can be assigned to them. Such requirements can be listed out under the Work Requirements head. For instance, if you're willing to travel overseas on duty, list it here.

## Resource Roles

### About Resource Role Assignment

Resource role assignment is the task of assigning roles to active resources within the deploying company.

These roles are previously set up, and have associated security privileges. Thus, when you assign a specific role to resources, they automatically receive access to specific business functions within the company. A resource can only have one role associated to organization membership and additionally can be assigned more individual resource roles. A resource can be part of any one organization at any given point of time during active resource assignment range (start date and end date).

#### *Related Topics*

- [Make an Employee a Sales Resource](#)
- [Create Additional Resource Roles](#)
- [How do I change user resource roles when job assignments change?](#)

### Define Resource Roles

A resource role, such as salesperson, denotes the function of a resource in an enterprise.

Oracle Applications Cloud comes with some predefined resource roles. You may either use these predefined, out of the box resource roles, or you may use the Manage Resource Roles task in the Setup and Maintenance work area to create additional resource roles or to modify predefined resource roles. Note that you must map these newly created resource roles to one or more job roles and abstract roles before you can use them. Access to business data and privileges to run business flows comes through job roles and abstract roles.

### Use Role Tags While Defining Resource Roles

You can set several tags while defining resource roles. Use these tags along with the organization hierarchy information to define the reporting hierarchy of resources.

- Use the Manager tag to define a role as a supervisor role. You must assign a resource organization to a manager resource, who will have visibility into all opportunities assigned to the members of that resource organization.
- Use the Member tag to make a role a subordinate role in the resource hierarchy.
- Use the Administrator or Lead tag to indicate the nature of the tasks that resources who are assigned these roles perform within the hierarchy.

Additionally, you can use these tags along with the resource organization hierarchy information to maintain manager-to-manager relationships within the organization. For example, Resource A is a manager who heads a sales organization and Resource B heads his own sales organization. Then, both Resource A and Resource B report into

Resource C, the Sales Vice President. Similarly, you can create resource organizations and manager resources, and relate managers to higher-level managers, building the resource organization and reporting hierarchies of the company.

## Assign Resource Role Types

Resource role types organize roles into logical groups. This simplifies role assignment and assignment tracking. For example, the Partner resource role type defines a set of partner-specific roles, such as partner sales representative and partner sales manager. Use the Sales resource role type and the Marketing resource role type to categorize the appropriate sales and marketing roles for internal employees or contingent worker resources.

## About Provisioning Roles

This topic explains role provisioning, and the difference between resource roles and job roles.

Role provisioning automates the provisioning and deprovisioning of roles, based on resource role assignment. You use job roles to provide access privileges. You can use Setup and Maintenance, Manage HCM Role Provisioning Rules task to map the job roles to the resource roles. Associating a resource role to a user enables the user to access the tasks and data based on the job roles assigned to the resource role.

## Difference between Resource Roles and Job Roles

Resource roles are used to filter resources, generate reporting hierarchies, and define security policies. A resource role may be assigned to a resource without a user account, while a job role can only be provisioned to a resource who has a user account. Job roles are used to define the security privileges for a user account.

## Overview of HCM Job-to-Role Mapping

A Human Capital Management (HCM) job indicates the designation of a person in the deploying company.

A job-to-role mapping associates HCM jobs with specific resource roles. You can establish job mapping for a resource role in Setup and Maintenance, Manage Resource Roles task. This mapping simplifies the task of assigning resource roles to new employees or contingent workers, resulting in time and cost efficiency.

For example, an employee joins the Sales department as a sales representative and the employee's job is already mapped to the Salesperson resource role. In this case, the employee is automatically converted to a resource and is assigned the mapped resource role. Thus, you can place new employees faster in organizational and reporting hierarchies.

Here's how to map HCM jobs and roles:

1. Verify that the HZ\_AUTOMATE\_RESOURCE\_CREATION profile option is set to Yes.
  - a. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
  - b. Search HZ\_AUTOMATE\_RESOURCE\_CREATION and ensure that its profile value is set to Yes.

2. Define HCM jobs and their structures, as required. For more information about defining jobs, see Related Topics section. You can also map existing jobs.
3. Map the HCM jobs to their roles.
  - a. In the Setup and Maintenance work area, go to the following:
    - Offering: Customer Data Management
    - Functional Area: Resources
    - Task: Manage Resource Roles
  - b. You can create a role with the required details by clicking **Actions** > **Create** or edit an existing role by clicking **Actions** > **Edit**.
  - c. Scroll down to Job Mapping and click **Actions** > **Add Row**.
  - d. Search the HCM jobs defined in Step 2 in the Job column.
  - e. Click Save and Close.

#### Related Topics

- [Jobs](#)

## About Resource Members and Dates

Every resource in the deploying company has start and end dates for a specific activity. When you assign resources to organizations, you must ensure that their date of assignment is within the employment date range.

### Resource Active Dates and Resource Assignment

When you identify internal or partner employees as resources, you can specify the time for which they're active within the organization. By default, the date you identify a resource becomes the start date, but there is no end date listed. Thus, an identified resource is active from the day of activation and you can assign the resource to any organization for an infinite period. A resource can be part of any one organization at any given point of time during active resource assignment range (start date and end date).

### Resource Skills and Resource Assignment

To get the best out of resources, you may define their skills relevant to the organization within which you deployed them. Determine whether a resource's skill set matches the requirements of an organization. Then, deploy the resource as appropriate for a period of time that falls within the active dates specified for the concerned resource.

## Restore Inactive Resource Roles

You may want to delete custom seed data such as a custom resource role when the role is no longer used in your organization.

If you have accidentally deleted these roles, as a sales admin, you can restore them. You can temporarily hide certain resource roles and also re-instate them back, if needed later. When you delete a role, it becomes inactive. You can restore the role later by first searching for the inactive role and then restoring it in the Manage Resource Roles task.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Customer Data Management
  - Functional Area: Resources
  - Task: Manage Resource Roles
2. In the search section, select Inactive in the Status filter to search for inactive roles.
3. Select the required role and click the Restore button.

**Note:** The Restore button is available only when there are inactive roles.

#### Results:

The inactive role is now active.

## Overview of Resource Roles, Job Roles, and Abstract Roles

A resource role, such as salesperson, denotes the function of a resource in a resource organization. Job roles and abstract roles provide users access to business data and privileges to run business flows.

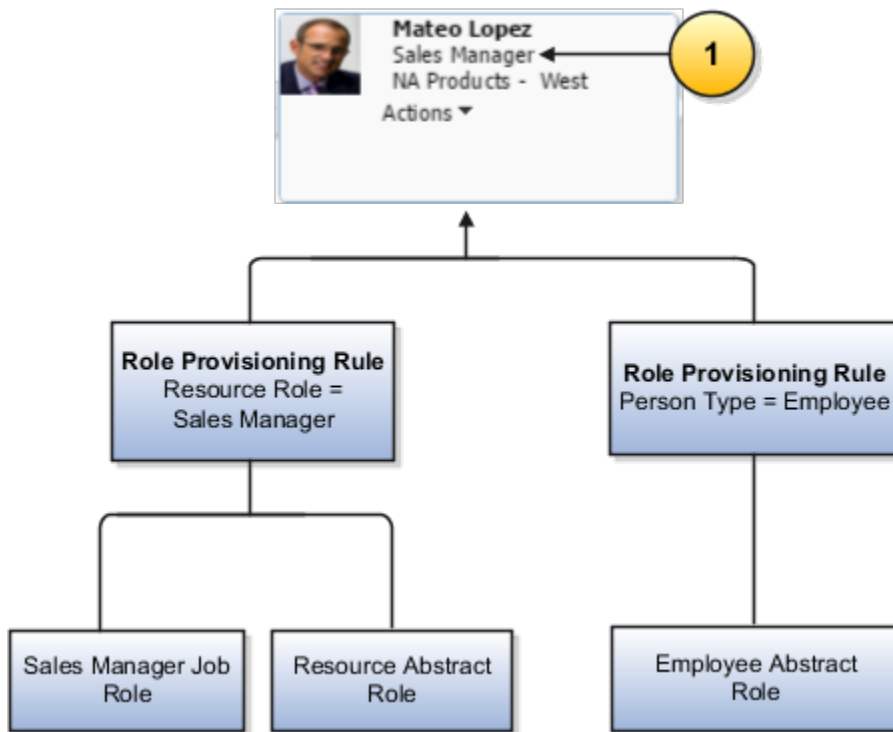
Oracle follows the industry standard Role Based Access Control approach to security. In Oracle Applications, the privileges are bundled in:

- Job roles, such as Sales Representative, which correspond to the jobs that the person is doing in your organization.
- Abstract roles, such as Employee or Contingent Worker, which permit users to carry on tasks that are common to all employees or resources.

For example, the Sales Manager job role makes it possible for a user to perform all of the sales manager duties, such as reviewing sales team performance and approving forecasts. The Employee abstract role adds the ability to access reports and manage personal profile information. The Resource abstract role makes it possible for a user to be assigned as a sales resource to accounts and opportunities.

When you create a user as an employee with the Sales Manager resource role provided by Oracle, as shown in the following figure, the application automatically provisions the Sales Manager job role and the Resource abstract

role. Because you're creating the user as an employee, the application also provisions the Employee abstract role.



## Resource Organizations

### Overview of Resource Organizations and Organization Usages

You can assign organization usage information to resource organizations to classify them based on how you want to use them. For instance, you can assign the Sales Organization usage to resource organizations engaged in sales activities.

This enables you to sort organizations based on their usage, simplifying your task of working with them.

### How Resource Roles and Resource Organizations Work Together

This topic explains how resource roles and resource organizations work together.

A single resource can belong to only one resource organization and be associated with only a single resource role, during a given period. The organizations and organization hierarchies that a resource belongs to determine the reporting relationships for that resource.

### Resource Roles

A resource role, such as salesperson or sales manager, denotes the function of a resource in an enterprise from the perspective of the deploying company. A resource role not only describes who a resource is in the enterprise, but also

specifies the role a resource performs within the context of an organization or team. A resource can have only one role in a resource organization during a given period.

**Note:** You can assign only one role to a resource at a time.

## Resource Organizations

A resource organization represents the internal organization and structure of the deploying company. Resource organizations are hierarchically structured, and the organization hierarchy helps to derive the reporting relationships. A resource can be a part of different organizations within the deploying company, and can have separate roles in each.

## About Primary Resource Organization by Usage

A resource can belong to only a single resource organization during a given period.

For each organization, you can assign different resource roles to a resource. When you assign a resource to one resource organization, the organization becomes the primary organization for the resource for a specific usage.

A resource organization becomes a primary resource organization by usage for a resource, if it meets the following criteria:

- Resource must be a member of the concerned organization.
- Resource organization must be classified as an organization with the specific usage.

For example, if you classify the resource organization as a marketing organization by usage, then the resource organization becomes the primary resource organization for the resource for marketing.

## Overview of Organization Memberships and Role Assignments

When you assign a resource to an organization, you must also specify the role the resource is required to play in the organization.

This helps ensure clarity on the tasks that you can assign to a resource and helps define where the resource is situated within the organization's hierarchy.

**Note:** An organization can have only one manager. A resource can have only one role in a resource organization during a given period.

## Associate Business Units with Resource Organizations

You can associate resource organizations with multiple business units.

The first business unit that you associate with a resource organization is automatically listed as the primary unit.



Associating resource organizations with business units helps you to view the relevant transactional details associated with the resource, such as opportunities, leads, and so on. By associating resource organizations with business units, you can also control access to contracts that are based on business units.

Users are associated with a business unit through their resource organization membership. Resource organizations are mapped to one or more business units. When a sales user is created, the user is assigned to a resource organization, and gains access to each business unit that's mapped to the resource organization. For example, users can access relevant transactional data associated with their primary business unit, but might also have access to relevant transactional data in other business units through their resource organization.

For more information about data access and business units, see the topics in the *Securing CX Sales and Fusion Service* guide.

You can associate a resource organization with multiple business units from the Resource Directory. For more information, see the *Associate Resource Organizations with Multiple Business Units* topic.

#### *Related Topics*

- [Multiple Business Units High-Level Setup Steps](#)
- [Associate Resource Organizations with Multiple Business Units](#)

## Associate Resource Organizations with Multiple Business Units

By associating resource organizations with business units, you can control access to the transactional data available to sales resources in business objects like opportunities and leads.

Here's how to associate resource organizations with multiple business units:

1. In Setup and Maintenance go to:
  - Offering: Sales
  - Functional Area: Users and Security
  - Task: Manage Resource Organization Members
2. In the Manage Resource Organization Members page, search for and select the resource organization that you want to associate with a business unit.
3. In the Organization page, click the **Business Units** tab.
4. In the table, click the add row icon.
5. Select a business unit from the **Business Unit** list.
6. Click **Save**. The first business unit you selected is set as the primary business unit.
7. Similarly, select additional business units from the **Business Unit** drop-down list.
8. Click **Save and Close**.

#### *Related Topics*

- [Multiple Business Units High-Level Setup Steps](#)

## Example of Adding or Removing an Organization From an Organization Hierarchy

This example describes how you can add or remove a sales organization to or from a sales organization hierarchy.

As new sales organizations are created within your company, you need to add these organizations to your company's sales organization hierarchy.

Similarly, you may want to remove organizations that no longer exist.

### Creating a New Version

1. Navigate to the **View Organization Hierarchies** UI page as follows: **Navigator > Resource Directory > Tasks > View Organization Hierarchies**.
2. Search and select the sales organization hierarchy you want to edit.
3. Click the **Action** menu. If you want to add the new organization to the sales organization hierarchy with immediate effect, select the **Edit This Hierarchy Version** option. If you want the new organization to display in the organization hierarchy only after a specific date, then select the **Create Hierarchy Version** option. If you choose the latter option, then you must specify the date from which the new version of the sales organization hierarchy must be active.

### Adding or Removing an Organization From the Sales Organization Hierarchy

1. Navigate to the **View Organization Hierarchies** UI page as follows: **Navigator > Resource Directory > Tasks > View Organization Hierarchies**.
2. Search and select the sales organization hierarchy to which you want to add a new organization.
3. On the **Action** menu, click either **Edit This Hierarchy Version** option or **Create Hierarchy Version** option.
4. In the **Create or Edit Organization Hierarchy Version** page, select the node in the sales organization hierarchy where you want to add the new sales organization and click the **Add** button.

**Note:** To delete an organization, select the required node and click the Remove button on the Edit Organization Hierarchy Version page. Click to confirm. If you don't plan to add any organization, skip to step 7.

5. Search and select the new sales organization in the **Add Tree Node** screen. This adds the new organization to the sales organization hierarchy.
6. Select the new organization in the hierarchy, and drag and drop it to the node where you want to place it. The organization appears in the location you specified within the selected sales organization hierarchy.
7. Click **Save and Close**.

## Example of Creating an Organization with Sales Usage

This example demonstrates how to create a resource organization with sales usage.

There are two options to create resource organizations with sales usage:

- Create an organization from an existing department
- Create a new organization

## Creating an Organization from an Existing Department

You must create an organization with sales usage from an existing department if the concerned department must be reused as a sales organization. Use the following steps:

1. Navigate to the Manage Internal Resource Organizations UI page as follows: **Navigator > My Enterprise > Setup and Maintenance > Tasks > Search > Search for Manage Internal Resource Organizations**.
2. You can either search for the organization whose usage you want to modify or click the **Create** button, select the **Create from Existing Department** option and specify the name of the organization in the **Create Organization: Select Creation Method** screen and click **Next**.
3. Click **Actions > Add Row**.
4. Specify **Sales Organization** as the Usage under the Organization Usages section of the screen.
5. Click **Finish**.

## Creating a New Organization with Sales Usage

1. Navigate to the Manage Internal Resource Organizations UI page as follows: **Navigator > Setup and Maintenance > My Enterprise > Tasks > Search > Search for Manage Internal Resource Organizations**.
2. Click **Actions > Create**.
3. Select the **Create New Organization** option on the **Create Organization: Select Creation Method** screen and click **Next**.
4. Specify the name of the new organization and select **Sales Organization** as its usage.
5. Click **Finish** to save the new organization with sales usage.

## Assign a Resource to an Organization

Once you have identified a resource, you can assign the resource to organizations within the deploying company. This example explains how you can assign resources to organizations.

### Scenario

You must assign a resource to an organization. A resource can belong to only one organization and can have only one role in an organization during a given period.

To assign a resource to an organization, perform the following tasks.

1. Navigate to the View Resources UI page as follows: **Navigator > Resource Directory > Tasks > View Resources**.
2. Search for a resource and select it.
3. Click the **Organizations** tab. This displays the list of organizations to which the resource belongs.
4. In the Actions drop-down list, click **Create**.
5. In the **Create Organization Membership** pop-up, search and select the organization you want from the Organization drop-down list.
6. In the Actions drop-down list, click **Add Row** and select the role the resource must play in the organization.
7. Enter the From Date and To Date, and click **OK**.
8. Click **Save and Close**.

You can also assign resources to organizations by searching for organizations and adding members to the organization. To assign resources to organizations by searching for organizations:

1. Navigate to the View Organizations UI page as follows: **Navigator > Resource Directory > Tasks > View Organizations**.
2. Search for an organization and select it.
3. Click the organization's name to display its details.
4. Click the **Members** tab to edit the list of members assigned to the organization.
5. In the Actions drop-down list, click **Create** to assign a new resource to the organization.
6. In the Add Resource Member window, select a resource from the **Resource** drop-down list.
7. Click the Add Row button to add a role to the newly-added resource.
8. Click the **Role** drop-down list and select the role the resource is required to play in the organization.
9. Enter the From Date and To Date, and click **OK**.
10. Click **Save and Close**.

**Note:**

1. The date from which a resource is a member of an organization must be on or after the date which the resource was hired.
2. You can't reassign the resource to the same organization, if a resource was already a member of the selected organization with an end date later than the current date. You also can't reassign the resource to the same organization, if the resource was removed from the organization before the end date.

## How do I manage resource organization hierarchy changes?

Consider a resource who's assigned the role of a manager. This manager may be part of a hierarchy and contain direct reports.

For example, a group of salespeople report to a sales manager and this sales manager reports to a sales director. The sales director might have one or more sales managers reporting to him or her.

A manager might leave the organization, transferred to another organization, maybe demoted from a resource manager role to a salesperson role, and so on. In all such cases, the direct reports maybe left as orphaned resources within the organization. To prevent such scenarios, by default it isn't allowed to change the manager having active child organization or direct reports.

When you need to move the manager having direct reports, as an exception, you can use the Enable End Dating Resource Manager Unconditionally (ORA\_HZ\_RES\_ENABLE\_MGR\_END\_UNCOND) profile option. This allows the movement of the manager resource without the need to move the child organizations and direct reports.

The Enable End Dating Resource Manager Unconditionally (ORA\_HZ\_RES\_ENABLE\_MGR\_END\_UNCOND) profile option is set to No by default. If the profile value is set to No and you try to end date the resource manager or end-date the resource organization membership of the resource manager while there are active direct reports, an error message is displayed. You must first move these direct reports to another organization and then end date the resource manager.

Complete these steps to set the value of the Enable End Dating Resource Manager Unconditionally (ORA\_HZ\_RES\_ENABLE\_MGR\_END\_UNCOND) profile option to Yes:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales

- Functional Area: Sales Foundation
- Task: Manage Administrator Profile Values

2. Search for `ORA_HZ_RES_ENABLE_MGR_END_UNCOND` and view or change the profile value.

**Note:** This profile option setting impacts the handling of resources using the application UI, Import, and web services. Changing this profile value to Yes leads to orphan resources and causing data integrity issues. We recommend that you don't change the profile value to Yes. If you must change the value, you must be extremely cautious specially while handling large volumes of resource organization data. You must provide a replacement of the manager at the earliest.

## FAQs for Sales Resources, Roles, and Organizations

### Frequently Asked Questions (FAQs) for Resources

This section contains the some frequently asked questions (FAQs) when setting up and maintaining resources. Scroll or search to find answers to common questions.

#### How do I define whether the user image, name, or initials display in the global header?

Set the User Image Display Enabled (`FND_USER_PHOTO_ENABLED`) profile option.

If you select:

- Yes, then the user image is displayed in the global header only if the user uploaded a photo. Otherwise, the user's initials are displayed. By default, this profile option is set to Yes.
- No, then only the user name is displayed in the global header.

#### *Related Topics*

- [Change Your Photo](#)

### What's a duty role?

Job and abstract roles permit users to carry out actions by virtue of the duty roles they include. Each predefined duty role consists of a logical grouping of privileges that represents the individual duties that users perform as part of their job. Duty roles are composed of security policies which grant access to work areas, dashboards, task flows, application pages, reports, batch programs, and so on. You can create duty roles and can include predefined and custom duty roles in custom job and abstract roles. You don't assign duty roles directly to users.

**Note:** For information about security policies, see the *Securing CX Sales and Fusion Service* guide.

## How can my user view application data?

You must identify a user as a resource to view your application data.

To identify specific employees, contingent workers, or partner contacts as resources, you must search for them and enable them as resources. You can use the Manage Resources task, Manage Users UI, and the Resource Directory to search persons and identify them as resources. Once you have identified these resources, you can assign them to organizations as required. Similarly, you can also identify newly added employees or contingent workers as resources.

## Can I assign more than one resource role to a resource organization member?

No. One resource can only have one role within an organization.

## Can I add more than one resource role to a resource?

Yes. While a resource can have only one resource role within a resource organization, a resource can have multiple individual roles.

Resource can't have multiple active roles with different organizations.

## What resource role is displayed on the Manage Users UI when a user is assigned more than one role?

The resource role displayed in the Resource Information section of the Create User or Edit User pages in the Manage Users work area is the resource role that's associated with the user's organization. If none of a user's resource roles is assigned to the user's organization, or an organization isn't specified for the user, then the first active resource role assigned to the user is the role that's displayed.

## What's a resource organization hierarchy?

A resource organization hierarchy is a hierarchically structured representation of the way resources are grouped within a resource organization. Resource organization hierarchies can contain other organizations within them. Thus, you can include any resource organization within the deploying company to create a single global hierarchy that depicts the operational structure of your company. We support up to 16 levels in the Resource Organization Hierarchy.

## Can I create a new organization hierarchy version?

Yes. To create a new hierarchy version, click **Navigator > Resource Directory > Tasks > View Organization Hierarchies** and select the hierarchy whose new version you want to create. Click **Action Create Hierarchy Version**. Make the changes to the hierarchy as required. Specify the dates between which the organization hierarchy must be active, and click **Save and Close** to save your changes.

## Can I create a new organization?

Yes. You can create organizations using the Manage Internal Resource Organizations task in Setup and Maintenance or in the Partner Management UI. You can also create resource organizations from the **User Management** UI. You can also use the UI to manage user accounts and roles, and to create employee and partner-member users.

## Can I create a new organization hierarchy?

No. All organizations within your deploying company are part of a large overarching global hierarchy. Therefore, you can't add new organization hierarchies. However, you can move existing organizations or attach new organizations to the existing hierarchy and create a new version of the hierarchy.

Once you have created a new version, specify the date from which the new version must become active. On the specified date, your new hierarchy version replaces the older hierarchy.

## Can I copy a resource organization hierarchy?

No. You can only have one resource organization hierarchy active at a time within a deploying company. If you have to create a hierarchy for an organization, you must specify the reporting structure within the concerned organization and then make the organization a part of the existing hierarchy.

## What happens if I delete a resource?

When you delete a resource, the resource is deleted from the Resource Directory and from the organizations with which the resource was associated. It's always best to check a resource's usage and remove the resource from all the organizations before deleting a resource from the resource directory.

## Can I create an employee or contingent worker resource?

No. You can only identify existing employees and contingent workers as resources in the Manage Resources task.

## What happens when a resource is end dated?

When resources are end dated, the resource is removed from all organizations in the deploying company, and no new work objects can be assigned to them. This also removes the resource from the organization hierarchy. The employee associated with the resource isn't impacted. All non-transactional business objects such as accounts and contacts are orphaned until you assign an owner. We recommend that you transfer all the assigned and owned entities or records to another active resource.

## How can I delete a resource from an organization?

To delete a resource from an organization, you must delete the concerned resource's membership from the organization.

To manage the membership of an organization, navigate to the **Manage Resource Organization Members** Setup and Maintenance task and select the organization concerned. Once the organization's membership details are listed, you can add, delete or edit them as required.

## What happens if I delete a resource from an organization?

When you delete a resource from an organization, you effectively delete the concerned resource's membership with the organization. This also removes the resource from the organization hierarchy. All transactions assigned to the resource are no longer visible to the resource's managers.

## How can I reactivate a deleted resource organization hierarchy?

To reactivate the resource organization hierarchy that you deleted, navigate to the **View Organization Hierarchies** page as follows: **Navigator > Resource Directory > Tasks > View Organization Hierarchies**. Search and select the deleted resource organization hierarchy. From the **Action** menu, select **Edit This Hierarchy Version** and set the Status to **Active**.

## What happens if I add a resource to an organization?

When you add a resource to an organization, the resource becomes a member of the organization and a part of the organization hierarchy.

Organization membership information is part of the publicly visible details of a resource profile. This means that a resource's organization membership and reporting structure are visible to all active resources within the organization.



## How can I reuse a resource organization in multiple organization hierarchies at the same time?

A resource organization can have one resource organization hierarchy for each internal organization and one partner organization hierarchy for each partner company. You can have one active version and multiple inactive versions of resource organization hierarchies. You can include resource organizations into any of the active or inactive organization hierarchies.

## Can I create multiple resources as managers within a resource organization?

No. An organization can have only one manager.

## Why didn't the Manage Resource Organization Hierarchies task open?

The Manage Resource Organization Hierarchies task may not open or be unresponsive if the browser some plugins installed. You can clear cookies or cache of the browser, use the browser's incognito mode, or use a different browser.

## How can I search and view resource information from other sources?

You can search for resources and view their public profiles using the Resource Directory. You can search for resources either by name or organization, or by the names of the teams to which they belong.

You can use the Resource Directory to view the following details of a resource's profile:

- Key profile information, including the resource's name, manager's name, job title, contact information, and so on.
- Organization membership information
- Roles of the resource
- Key skills of the resource
- Additional contact information
- Salesperson details, if applicable.

You can search for organizations or teams, instead of searching for users. Then, you can view the list of resources that belong to an organization or team, and view the profiles of any resource listed.

## Why am I unable to view the resource hierarchy for my organization?

You must enable the reporting structure of your organization for a resource or reporting hierarchy to be visible. If there is no manager defined for an organization, the reporting hierarchy of the organization can't be constructed. Verify if your organization is assigned a manager in Resource Management.

## Can I view a resource organization hierarchy version as of a particular date?

Yes. Unless otherwise specified, organization hierarchies are active since the date of their creation. Navigate to the **View Organization Hierarchies** page from the Resource Directory to view the hierarchy of a resource organization at a specific date. You can search and select the organization hierarchy to view its details. This displays the concerned organization's active hierarchy. A drop-down list displays the date from which the current organization hierarchy has been active. You can select the required date from the drop-down list to view the organization hierarchy for a particular date.

## How can I sync resource organization hierarchy with HCM department hierarchy? Is resource organization same as HCM department ?

Resource organization hierarchy isn't the same as HCM department hierarchy. Resource organization doesn't refer to HCM department. Currently, resource organization hierarchy can't be synced with HCM department hierarchy.

## How can I prevent the validation script of the contact object from impacting other objects such as resources and suppliers?

You must write your application code in such a way that the validation script of the contact object doesn't impact other object flows such as resources or suppliers. Here's a sample Groovy code:

```
if (InternalFlag == 'N')
{
<your application code>
}
```

## What happens if an employee or worker quits or is terminated?

When an employee leaves your company, it's best practice to inactivate the employee's user account of an application. Inactivating the user's account prevents the user from being able to log in to the application. After you inactivate a user account, you must set end date the resource.



# 6 Geographies

## Overview of Geographies

### Overview of Geographies, Geographic Entities, and Locations

Geography is a physical space on Earth, such as a location or region, that's defined by a boundary. For example, it maybe existing geopolitical locations such as San Jose or Peru.

These geographical locations are used in applications to manage business requirements such as sales territories, transportation deliveries, taxation, logistics, and so on.

#### Geography Type

A divisional grouping of geographies is named as Geography Types. It could be a geopolitical division such as Country, First Order Administrative Divisions (example: State, Province, District, and so on), City, Town, Village, or Non-Administrative Divisions (example: Southwest China, Northern California, and so on) or physical geographic divisions such as Island, Continent, Mountain, and so on.

#### Geography Use

Specifying the purpose and use of these geographies is known as Geography Use. Data could be classified for use by processes such as Taxation, Sales, Transportation, Marketing and so on.

#### Master Reference Geography Use

Master Reference Geography Use is data that's classified as being the source of truth. This data is used as a reference for creating User-defined Geography Uses and as the source when working with geographical data such as validating addresses or importing data. This data can be obtained from a third party or manually entered. It is defined by widely recognized administrative or political boundaries such as States, Provinces, Counties, Cities, and so on.

#### Master Reference Geographies

Master Reference Geographies are geographical boundary names and physical boundaries that are classified as being part of the Master Reference Geography Use. Examples include the State of California, the Province of Alberta, The Country of India, and so on.

#### Master Reference Geography Type

Master Reference Geography Type is a layer of Master Reference Geographies. Examples of Master Reference Geography Types would include States, Cities, Provinces, Countries, and so on.

### How Geography Structure, Hierarchy, and Validation Fit Together

This topic presents the components of geographies.

The following three components are dependent on each other when defining a country:

1. Geography structure
2. Geography hierarchy
3. Geography validation

Every country must have the geography structure defined first before the hierarchy can be defined, and the geography hierarchy has to be defined before the validation can be defined.

## Geography Structures

The first step for defining a country is to create a geography structure in which geography types are part of the country structure, and then define how the geography types are hierarchically related within the country structure. For example, you can create geography types called State, City, and Postal Code. Then you can rank the State geography type as the highest level within the country, the City as the second level, and the Postal Code as the lowest level within the country structure. Geography structure can be defined using the **Manage Geographies** task, or can be imported using tasks in the **Define Geographies** activity.

**Note:** During import of geography data from any provider if one or more geography levels aren't available, n/a is substituted for those geography levels. For example, the list of values in the address UIs of accounts, contacts, suppliers, persons, and so on are displayed as n/a for such geography levels.

A geography structure is a hierarchical grouping of geography types for a country. The following table describes the geography structure for the United States.

| Level | Geography Type |
|-------|----------------|
| 1     | State          |
| 2     | County         |
| 3     | City           |
| 4     | Postal Code    |

You can use the geography structure to relate geography types for a country and define geography types for a country.

### Relate Geography Types for a Country

You can determine how a country's geographies are hierarchically related by creating the hierarchy of the geography types in the geography structure. When you define a country's structure, the geography type Country is implicitly at the highest level of the geography structure with level as 1. The subsequent geography types that you add after country are numbered in sequence.

You must add a geography type as a level in the country structure before you can define a geography for that geography type in a country. For example, before defining the state of California, the State geography type must be added to the

United States country structure. To quickly create country structure, you can copy a structure from another country and modify the geography types for the country.

## Define Geography Types for a Country

You can use any of the master reference geography types to create your geography structure. If required, you can create a geography type, before adding it to the country structure. Each geography type is added at a lower level to the current lowest level.

**Note:** You can't delete geography types that have associated geography data. You can only delete the lowest level geography type of the country structure.

You can use a geography type that you create within the country structure for other country structures as well.

## Geography Hierarchy

Once the geography structure is defined, the geographies for each geography type can be added to the hierarchy. For example, in the hierarchy of United States you can create a geography called California using a State geography type.

As part of managing the geography hierarchy you can view, create, edit, and delete the geographies for each geography type in the country structure. You can also add a primary and alternate name and code for each geography. A geography hierarchy can be created using the Manage Geographies task, or can be imported using tasks in the Define Geographies activity.

Geography hierarchy is a data model that creates conceptual parent-child relationships between geographies.

The application uses geography hierarchy information to facilitate business processes that rely on geography information, such as, tax calculation, order sourcing rules, and sales territory definition. The geography hierarchy information is centrally located and shared among other application offerings.

The geography hierarchy includes geography, geography type, geography usage, master reference geography hierarchy and user defined zones.

If you delete a geography level, all the children in that geography hierarchy are also deleted. For example, under a state you have defined zones using a range of postal codes. Later, you delete the state because you no longer support that state in your business. All the zones defined within that state are also deleted.

## How do I add a geography to the geography hierarchy?

You can add a new geography to the geography hierarchy. The new geography can be added under any level of the hierarchy for an existing geography type in the country geography structure.

For example, we can add a new postal code 94065 under United State, California, San Mateo, Redwood City.

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for **Manage Geographies**.
3. On the Manage Geographies page, enter US in the **Code** field. Click **Search**.

4. Click **Hierarchy Defined** for United States.

**Note:** If there are many child geographies for the selected parent geography, a message asking you to refine the search criteria is displayed. The child geographies are displayed after you refine the search criteria. If there are many search results, you may have to further refine the search criteria. The maximum number of child geographies that can be displayed is controlled by the `ORA_HZ_GEO_HIERARCHY_LIMIT` profile option. You can change the value of this profile option by navigating to the Setup and Maintenance work area, click the Tasks menu, and search for Manage Administrative Profile Values task. Search for the `ORA_HZ_GEO_HIERARCHY_LIMIT` profile option and change the value.

5. Search using State as the Geography Type and CA as the Code.
6. Drill down to San Mateo and select Redwood City.
7. Click **Actions > Create**.
8. Type 94065 for Name in the **Primary Name and Alternative Names** section.
9. Click **Save and Close**.
10. Click **Save and Close**.
11. Click **Done**.

## Edit a Specific Geography in the Geography Hierarchy

You can edit the following details of a geography hierarchy using the Manage Geography Hierarchy page:

- geography's date range
- primary and alternate names
- primary and alternate codes
- creating geographies within the hierarchy such as adding a postal code for a city.

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for **Manage Geographies**.
3. On the Manage Geographies page, enter US in the **Code** field. Click **Search**.
4. Click **Hierarchy Defined** for United States.

**Note:** If there are many child geographies for the selected parent geography, a message asking you to refine the search criteria is displayed. The child geographies are displayed after you refine the search criteria. If there are many search results, you may have to further refine the search criteria. The maximum number of child geographies that can be displayed is controlled by the `ORA_HZ_GEO_HIERARCHY_LIMIT` profile option. You can change the value of this profile option by navigating to the Setup and Maintenance work area, click the Tasks menu, and search for Manage Administrative Profile Values task. Search for the `ORA_HZ_GEO_HIERARCHY_LIMIT` profile option and change the value.

5. Search using State as the Geography Type and CA as the Code.
6. Select CA and click **Actions > Edit**.
7. (Optional) Select the row that you want to specify as the primary name under the **Primary and Alternative Names** section and click **Actions > Set Primary**.
8. (Optional) Select the row that you want to specify as the primary code under the **Primary and Alternative Codes** section and click **Actions > Set Primary**.
9. Click **Save and Close**.
10. Click **Save and Close**.
11. Click **Done**.

## Edit Alternative Names and Codes for an Existing Country

You can add or edit alternative names and codes for an existing geography in the geography hierarchy.



For example, you can add a FIPS code of 06 for the state of California.

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for **Manage Geographies**.
3. On the Manage Geographies page, enter US in the **Code** field. Click **Search**.
4. Click **Hierarchy Defined** for United States.

**Note:** If there are many child geographies for the selected parent geography, a message asking you to refine the search criteria is displayed. The child geographies are displayed after you refine the search criteria. If there are many search results, you may have to further refine the search criteria. The maximum number of child geographies that can be displayed is controlled by the ORA\_HZ\_GEO\_HIERARCHY\_LIMIT profile option. You can change the value of this profile option by navigating to the Setup and Maintenance work area, click the Tasks menu, and search for Manage Administrative Profile Values task. Search for the ORA\_HZ\_GEO\_HIERARCHY\_LIMIT profile option and change the value.

5. Search using State as the Geography Type and CA as the Code.
6. Select CA and click **Actions > Edit**.
7. In the **Primary and Alternative Codes** section, click **Actions > Add**.
8. Type 06 under **Code** and select FIPS code as the **Code Type**.
9. Click **Save and Close**.
10. Click **Save and Close**.
11. Click **Done**.

## How do I manage geography validation?

After defining the geography hierarchy, you need to specify the structure for the country.

You can choose which address style format you would like to use for the country, and for each selected address style format you can map geography types to address attributes. You can also select which geography types to include in address validation or tax validation, and which geography types will display in a list of values during address entry in other user interfaces. The geography validation level for the country, such as error or warning, can also be selected. Geography validation determines the geography mapping and validation for a country's *address styles*, and the overall address validation control for a country.

The **No Styles Format** address style format is the default address style format for a country. By defining the mapping and validation for this format you will ensure that validations can be performed for any address in the country. After the **No Styles Format** is defined you can set up additional mapping for specific address styles.

For each address style format, you can define the following:

- Map to attribute
- Enable list of values
- Tax validation
- Address validation
- Address validation control

### Attribute Mapping

For every address style format, you can map each geography type to an address attribute. For example, you can map the **State** geography type to the **State** address attribute for the United States, or map the **State** geography type

to the **County** address attribute for the United Kingdom. The geography types that appear are based on how the country structure is defined. The list of address attributes that appear are based on address formats delivered with the application, or your customer defined address formats.

**Note:** You only need to map geography types that you want to use for address or tax validation purposes.

## Enable List of Values

Once a geography type is mapped to an attribute, then you can specify whether the geography type will appear in a list of values during address entry in user interfaces. It is very important to review carefully if you want to enable a list of values. You should only enable a list of values if you have sufficient geography data imported or created for that geography. If the setup for master geography data is incomplete, then the geography data is either not imported or created. As a result, the list of values for the address attribute doesn't list any geography data.

Once you have enabled a list of values for an address attribute, you can only select the geography data available for the geography type. This means that if a specific geography value isn't available in the geography hierarchy, you can't create an address with a different geography value.

**Note:** Enable List of Values applies to the UI only. It doesn't apply to import, web services, nor REST APIs. For these, all of the required geography types must have a value in the request when creating or updating an address.

## Tax Validation

You can also specify whether a geography type will be included in tax validation. For example, for the United States North America address style format you specify that County, State, and City are used for tax validation. This will mean that when a transaction involves an address with the North America address style, the address must have the correct county, state, and city combination based on the geography hierarchy data, to be considered valid for tax calculation.

## Address Validation

You must set up address validation for those geography elements that you plan to use in your application. Address validation checks whether geography elements of an address such as state, city, postal code, and soon are valid as per master geography data. Setting up validation also helps ensure that the addresses are correct and deliverable during entry. You can select states or other address elements from lists to ensure accuracy during entry. For example, when you enter a postal code, the application can validate if the postal code exists. Note that address validation isn't the same as address verification. *Address Verification* updates and enhances your address. Address verification depends upon Oracle or any third-party address verification services to perform verification.

You can specify whether a geography type will be included in address validation. For example, when the user enters a United States address using the North American address style format, the address must have the correct country, state, and postal code combination based on geography hierarchy data to be considered geographically valid.

If an address element is mapped to a geography type, but not selected for geography validation usage, then during address entry suggested values are provided for the address element, but the address element isn't validated.

You need to verify that the default mapping between **Geography Type** and **Map to Attribute** is valid in the Geography Mapping and Validation region and update it if required when you define geography validation.

After setting geography validation, all features that directly and indirectly depend upon geographies are impacted. For example, multiple applications such as ERP, CX, and SCM that use geographies are impacted.

Oracle recommends that you use the following valid mapping for the countries that Loqate supports:

| Country Name           | Country Code | Geography Type                                                                                                                             | Map to Attribute                                                                                                                                       |
|------------------------|--------------|--------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Andorra                | AD           | <ul style="list-style-type: none"> <li>Country</li> <li>Parroquia</li> <li>Settlement</li> <li>Postal Code</li> </ul>                      | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                            |
| Angola                 | AO           | <ul style="list-style-type: none"> <li>Country</li> <li>Provincia</li> <li>Município</li> <li>Comuna</li> <li>Localidad</li> </ul>         | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Additional address attribute 2</li> </ul>      |
| Argentina              | AR           | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>Department</li> <li>Municipality</li> <li>Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                         |
| Australia              | AU           | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal Code</li> </ul>                                | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                            |
| Austria                | AT           | <ul style="list-style-type: none"> <li>Country</li> <li>Bundensland</li> <li>Bezirk</li> <li>Gemeinde</li> <li>Postal Code</li> </ul>      | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                            |
| Belgium                | BE           | <ul style="list-style-type: none"> <li>Country</li> <li>Gewest</li> <li>Provincie</li> <li>Gemeente</li> <li>Postal Code</li> </ul>        | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul> |
| Bolivia                | BO           | <ul style="list-style-type: none"> <li>Country</li> <li>Departamento</li> <li>Provincia</li> <li>Canton</li> </ul>                         | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>City</li> </ul>                      |
| Bosnia and Herzegovina | BA           | <ul style="list-style-type: none"> <li>Country</li> </ul>                                                                                  | <ul style="list-style-type: none"> <li>Country</li> </ul>                                                                                              |

| Country Name                                                                          | Country Code | Geography Type                                                                                                                       | Map to Attribute                                                                                                                                       |
|---------------------------------------------------------------------------------------|--------------|--------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                       |              | <ul style="list-style-type: none"> <li>District</li> <li>Kanton</li> <li>Opcine</li> <li>Nasalje</li> <li>Postal Code</li> </ul>     | <ul style="list-style-type: none"> <li>Additional address attribute 1</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>  |
| Brazil                                                                                | BR           | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal Code</li> </ul>                          | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                            |
| Bulgaria                                                                              | BG           | <ul style="list-style-type: none"> <li>Country</li> <li>Oblast</li> <li>Obshhina</li> <li>Settlement</li> <li>Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul> |
| Canada                                                                                | CA           | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal Code</li> </ul>                       | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>                                         |
| Cayman Islands                                                                        | KY           | <ul style="list-style-type: none"> <li>Country</li> <li>Island</li> <li>District</li> <li>Postal Code</li> </ul>                     | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                            |
| Chile                                                                                 | CL           | <ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Provincia</li> <li>Kommune</li> <li>Postal Code</li> </ul>   | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                            |
| China                                                                                 | CN           | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal Code</li> </ul>                       | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>                                         |
| <b>Note:</b><br>China geography structure is supported but geocoding isn't supported. |              |                                                                                                                                      |                                                                                                                                                        |
| Croatia                                                                               | HR           | <ul style="list-style-type: none"> <li>Country</li> </ul>                                                                            | <ul style="list-style-type: none"> <li>Country</li> </ul>                                                                                              |

| Country Name       | Country Code | Geography Type                                                                                                                               | Map to Attribute                                                                                                                         |
|--------------------|--------------|----------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|
|                    |              | <ul style="list-style-type: none"> <li>• Zupanije</li> <li>• Grad</li> <li>• Postal Code</li> </ul>                                          | <ul style="list-style-type: none"> <li>• Province</li> <li>• City</li> <li>• Postal code</li> </ul>                                      |
| Cuba               | CU           | <ul style="list-style-type: none"> <li>• Country</li> <li>• Provincia</li> <li>• Municipio</li> <li>• City</li> <li>• Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• County</li> <li>• City</li> <li>• Postal code</li> </ul> |
| Cyprus             | CY           | <ul style="list-style-type: none"> <li>• Country</li> <li>• Periochi</li> <li>• Dimos</li> <li>• Postal Code</li> </ul>                      | <ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• City</li> <li>• Postal code</li> </ul>                   |
| Czech Republic     | CZ           | <ul style="list-style-type: none"> <li>• Country</li> <li>• Kraj</li> <li>• Okres</li> <li>• Obec</li> <li>• Postal Code</li> </ul>          | <ul style="list-style-type: none"> <li>• Country</li> <li>• State</li> <li>• County</li> <li>• City</li> <li>• Postal code</li> </ul>    |
| Denmark            | DK           | <ul style="list-style-type: none"> <li>• Country</li> <li>• Amt</li> <li>• Settlement</li> <li>• Postal Code</li> </ul>                      | <ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• City</li> <li>• Postal code</li> </ul>                   |
| Dominican Republic | DO           | <ul style="list-style-type: none"> <li>• Country</li> <li>• Provincia</li> <li>• Municipio</li> <li>• Town</li> <li>• Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• County</li> <li>• City</li> <li>• Postal code</li> </ul> |
| Ecuador            | EC           | <ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• Canton</li> <li>• City</li> <li>• Postal Code</li> </ul>     | <ul style="list-style-type: none"> <li>• Country</li> <li>• Province</li> <li>• County</li> <li>• City</li> <li>• Postal code</li> </ul> |
| Estonia            | EE           | <ul style="list-style-type: none"> <li>• Country</li> <li>• Maakond</li> <li>• Vald</li> <li>• Postal Code</li> </ul>                        | <ul style="list-style-type: none"> <li>• Country</li> <li>• State</li> <li>• City</li> <li>• Postal code</li> </ul>                      |

| Country Name  | Country Code | Geography Type                                                                                                                                       | Map to Attribute                                                                                                                                                    |
|---------------|--------------|------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Finland       | FI           | <ul style="list-style-type: none"> <li>Country</li> <li>Laani</li> <li>Kunta</li> <li>Postal Code</li> </ul>                                         | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                                         |
| France        | FR           | <ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Department</li> <li>Commune</li> <li>Postal Code</li> </ul>                  | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                 |
| Germany       | DE           | <ul style="list-style-type: none"> <li>Country</li> <li>Bundesland</li> <li>Gemeinde</li> <li>Postal Code</li> </ul>                                 | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                                         |
| Great Britain | GB           | <ul style="list-style-type: none"> <li>Country</li> <li>County</li> <li>Township</li> <li>Postal Code</li> </ul>                                     | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                                         |
| Greece        | GR           | <ul style="list-style-type: none"> <li>Country</li> <li>Periferia</li> <li>Nomi</li> <li>Dimotika</li> <li>Postal Code</li> </ul>                    | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                                         |
| Guadalupe     | GP           | <ul style="list-style-type: none"> <li>Country</li> <li>Commune</li> <li>Postal Code</li> </ul>                                                      | <ul style="list-style-type: none"> <li>Country</li> <li>City</li> <li>Postal code</li> </ul>                                                                        |
| Guam          | GU           | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>Municipality</li> <li>Village</li> <li>Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Additional address attribute 2</li> <li>Postal code</li> </ul> |
| Guernsey      | GG           | <ul style="list-style-type: none"> <li>Country</li> <li>City</li> <li>Parishes</li> </ul>                                                            | <ul style="list-style-type: none"> <li>Country</li> <li>City</li> </ul>                                                                                             |

| Country Name | Country Code | Geography Type                                                                                                                                      | Map to Attribute                                                                                                                                                       |
|--------------|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|              |              | <ul style="list-style-type: none"> <li>Villages</li> <li>Postal Code</li> </ul>                                                                     | <ul style="list-style-type: none"> <li>Additional address attribute 2</li> <li>Additional address attribute 3</li> <li>Postal Code</li> </ul>                          |
| Hungary      | HU           | <ul style="list-style-type: none"> <li>Country</li> <li>Megye</li> <li>Jaras</li> <li>Telepules</li> <li>Settlement</li> <li>Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul> |
| Iceland      | IS           | <ul style="list-style-type: none"> <li>Country</li> <li>Jaras</li> <li>Telepules</li> <li>Settlement</li> <li>Postal Code</li> </ul>                | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                                         |
| India        | IN           | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal Code</li> </ul>                                         | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                                            |
| Indonesia    | ID           | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>Regency</li> <li>City</li> <li>Postal Code</li> </ul>                     | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                                         |
| Ireland      | IE           | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>Post County</li> <li>Postal_Code</li> </ul>                               | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal Code</li> </ul>                                                            |
| Isles of Man | IM           | <ul style="list-style-type: none"> <li>Country</li> <li>Locality</li> <li>Settlement</li> <li>Postal Code</li> </ul>                                | <ul style="list-style-type: none"> <li>Country</li> <li>City</li> <li>Additional address attribute 2</li> <li>Postal code</li> </ul>                                   |
| Israel       | IL           | <ul style="list-style-type: none"> <li>Country</li> <li>District</li> </ul>                                                                         | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> </ul>                                                                                               |

| Country Name  | Country Code | Geography Type                                                                                                                        | Map to Attribute                                                                                                                                       |
|---------------|--------------|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
|               |              | <ul style="list-style-type: none"> <li>Subdistrict</li> <li>City</li> <li>Postal Code</li> </ul>                                      | <ul style="list-style-type: none"> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                                                            |
| Italy         | IT           | <ul style="list-style-type: none"> <li>Country</li> <li>Regione</li> <li>Provincia</li> <li>Comune</li> <li>Postal code</li> </ul>    | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul> |
| Jamaica       | JM           | <ul style="list-style-type: none"> <li>Country</li> <li>Parish</li> <li>Settlement</li> </ul>                                         | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> </ul>                                                                 |
| Japan         | JP           | <ul style="list-style-type: none"> <li>Country</li> <li>Prefecture</li> <li>City</li> <li>Postal Code</li> </ul>                      | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                            |
| Jordan        | JO           | <ul style="list-style-type: none"> <li>Country</li> <li>Muhafazat</li> <li>Liwa</li> <li>Tajma</li> <li>Postal Code</li> </ul>        | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                            |
| Kenya         | KE           | <ul style="list-style-type: none"> <li>Country</li> <li>County</li> <li>Division</li> <li>Settlement</li> </ul>                       | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Additional address attribute 2</li> </ul>                         |
| Latvia        | LV           | <ul style="list-style-type: none"> <li>Country</li> <li>Rajons</li> <li>Pilseta</li> <li>Postal Code</li> </ul>                       | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                            |
| Liechtenstein | LI           | <ul style="list-style-type: none"> <li>Country</li> <li>Wahlkreis</li> <li>Gemeinde</li> <li>District</li> <li>Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>    |



| Country Name | Country Code | Geography Type                                                                                                                              | Map to Attribute                                                                                                                                      |
|--------------|--------------|---------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lithuania    | LT           | <ul style="list-style-type: none"> <li>Country</li> <li>County</li> <li>Municipality</li> <li>Ward</li> <li>Postal Code</li> </ul>          | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                           |
| Luxembourg   | LU           | <ul style="list-style-type: none"> <li>Country</li> <li>Canton</li> <li>Commune</li> <li>Settlement</li> <li>Postal Code</li> </ul>         | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                           |
| Malaysia     | MY           | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>District</li> <li>Subdistrict</li> <li>Postal Code</li> </ul>        | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                           |
| Malta        | MT           | <ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Local Council</li> <li>Postal Code</li> </ul>                       | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                           |
| Martinique   | MQ           | <ul style="list-style-type: none"> <li>Country</li> <li>Department</li> <li>Arrondissement</li> <li>Commune</li> <li>Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                           |
| Mexico       | MX           | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>Municipality</li> <li>Locality</li> <li>Postal Code</li> </ul>       | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>Additional address attribute 2</li> <li>Postal code</li> </ul> |
| Netherlands  | NL           | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>Municipality</li> <li>Town</li> <li>Postal Code</li> </ul>        | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                        |

| Country Name | Country Code | Geography Type                                                                                                                          | Map to Attribute                                                                                                               |
|--------------|--------------|-----------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|
| New Zealand  | NZ           | <ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Town</li> <li>Postal Code</li> </ul>                            | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                    |
| Norway       | NO           | <ul style="list-style-type: none"> <li>Country</li> <li>Fylke</li> <li>Kommune</li> <li>Postal Code</li> </ul>                          | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>                 |
| Oman         | OM           | <ul style="list-style-type: none"> <li>Country</li> <li>Muhafazah</li> <li>District</li> <li>City</li> </ul>                            | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> </ul>                         |
| Peru         | PE           | <ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Provincia</li> <li>Distrito</li> <li>Postal Code</li> </ul>     | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul> |
| Poland       | PL           | <ul style="list-style-type: none"> <li>Country</li> <li>Wojewodztwo</li> <li>Powiat</li> <li>Gmina</li> <li>Postal Code</li> </ul>      | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul> |
| Portugal     | PT           | <ul style="list-style-type: none"> <li>Country</li> <li>Distrito</li> <li>Concelho</li> <li>Settlement</li> <li>Postal Code</li> </ul>  | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul> |
| Puerto Rico  | PR           | <ul style="list-style-type: none"> <li>Country</li> <li>Commonwealth</li> <li>Municipio</li> <li>Barrio</li> <li>Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>    |
| Qatar        | QA           | <ul style="list-style-type: none"> <li>Country</li> <li>Municipality</li> <li>Zone</li> </ul>                                           | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> </ul>                                         |

| Country Name   | Country Code | Geography Type                                                                                                                                            | Map to Attribute                                                                                                                                                       |
|----------------|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Reunion Island | RE           | <ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Department</li> <li>Commune</li> <li>Postal Code</li> </ul>                       | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                                            |
| Romania        | RO           | <ul style="list-style-type: none"> <li>Country</li> <li>Regiune</li> <li>Judet</li> <li>Settlement</li> <li>Comuna</li> <li>Postal Code</li> </ul>        | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul> |
| Russia         | RU           | <ul style="list-style-type: none"> <li>Country</li> <li>Federal_District</li> <li>Federal_Subject</li> <li>Oblast</li> <li>Postal Code</li> </ul>         | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                    |
| San Marino     | SM           | <ul style="list-style-type: none"> <li>Country</li> <li>Comune</li> <li>Postal Code</li> </ul>                                                            | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>Postal code</li> </ul>                                                                          |
| Singapore      | SG           | <ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>District</li> <li>Postal Code</li> </ul>                                          | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                                            |
| Slovakia       | SK           | <ul style="list-style-type: none"> <li>Country</li> <li>Kraj</li> <li>Okres</li> <li>Obec</li> <li>Postal Code</li> </ul>                                 | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                                         |
| Slovenia       | SI           | <ul style="list-style-type: none"> <li>Country</li> <li>Regija</li> <li>Upravna Enota</li> <li>Obcina</li> <li>Settlement</li> <li>Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>County</li> <li>City</li> </ul>                      |

| Country Name | Country Code | Geography Type                                                                                                                                              | Map to Attribute                                                                                                                                       |
|--------------|--------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
|              |              |                                                                                                                                                             | <ul style="list-style-type: none"> <li>Postal code</li> </ul>                                                                                          |
| South Africa | ZA           | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>District Municipality</li> <li>Local Municipality</li> <li>Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                         |
| South Korea  | KR           | <ul style="list-style-type: none"> <li>Country</li> <li>Jibang</li> <li>Siti</li> <li>Postal Code</li> </ul>                                                | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                            |
| Spain        | ES           | <ul style="list-style-type: none"> <li>Country</li> <li>Autonomous Community</li> <li>Province</li> <li>City</li> <li>Postal Code</li> </ul>                | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul> |
| Sri Lanka    | LK           | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>District</li> <li>Divisional Secretariat</li> <li>Postal Code</li> </ul>          | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                         |
| Swaziland    | SZ           | <ul style="list-style-type: none"> <li>Country</li> <li>District</li> <li>Inkhundla</li> <li>Town</li> <li>Postal Code</li> </ul>                           | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                         |
| Sweden       | SE           | <ul style="list-style-type: none"> <li>Country</li> <li>Lan</li> <li>Settlement</li> <li>Postal Code</li> </ul>                                             | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> <li>Postal code</li> </ul>                                         |
| Switzerland  | CH           | <ul style="list-style-type: none"> <li>Country</li> <li>Kanton</li> <li>Bezirk</li> <li>Gemeinde</li> <li>Postal Code</li> </ul>                            | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                            |

**Note:**  
This country maybe labeled  
Eswatini in Manage Territories.

| Country Name         | Country Code | Geography Type                                                                                                                   | Map to Attribute                                                                                                                                    |
|----------------------|--------------|----------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
| Taiwan               | TW           | <ul style="list-style-type: none"> <li>Country</li> <li>County</li> <li>Town</li> <li>Postal Code</li> </ul>                     | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                         |
| Thailand             | TH           | <ul style="list-style-type: none"> <li>Country</li> <li>Region</li> <li>Changwat</li> <li>Amphoe</li> <li>Postal Code</li> </ul> | <ul style="list-style-type: none"> <li>Country</li> <li>Additional address attribute 1</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul> |
| Tunisia              | TN           | <ul style="list-style-type: none"> <li>Country</li> <li>Governorate</li> <li>Delegation</li> <li>Postal Code</li> </ul>          | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal Code</li> </ul>                                         |
| Turkey               | TR           | <ul style="list-style-type: none"> <li>Country</li> <li>Sehir</li> <li>Ilce</li> <li>Kasaba</li> <li>Postal Code</li> </ul>      | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                      |
| United Arab Emirates | AE           | <ul style="list-style-type: none"> <li>Country</li> <li>Emirate</li> <li>City</li> <li>Area</li> </ul>                           | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Additional address attribute 2</li> </ul>                      |
| United States        | US           | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal Code</li> </ul>      | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>County</li> <li>City</li> <li>Postal code</li> </ul>                         |
| Uruguay              | UY           | <ul style="list-style-type: none"> <li>Country</li> <li>Departamento</li> <li>City</li> <li>Postal Code</li> </ul>               | <ul style="list-style-type: none"> <li>Country</li> <li>State</li> <li>City</li> <li>Postal code</li> </ul>                                         |
| Vatican City         | VA           | <ul style="list-style-type: none"> <li>Country</li> <li>Municipal</li> <li>Settlement</li> </ul>                                 | <ul style="list-style-type: none"> <li>Country</li> <li>Province</li> <li>City</li> </ul>                                                           |

| Country Name | Country Code | Geography Type                                                                                                                         | Map to Attribute                                                                                                                                                |
|--------------|--------------|----------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
|              |              | <ul style="list-style-type: none"><li>Postal Code</li></ul>                                                                            | <ul style="list-style-type: none"><li>Postal code</li></ul>                                                                                                     |
| Vietnam      | VN           | <ul style="list-style-type: none"><li>Country</li><li>Region</li><li>Tihn</li><li>Quan</li><li>Thank Pho</li><li>Postal Code</li></ul> | <ul style="list-style-type: none"><li>Country</li><li>Additional address attribute 1</li><li>Province</li><li>County</li><li>City</li><li>Postal code</li></ul> |

**Note:** For either the tax or address validation, don't skip any level unless you're certain that the selected geography types can uniquely identify geographies. For example, the United States country structure is: State, County, City, and Postal Code, and you want to select just State and Postal Code for address or tax validation. However, for the combination of California and 94065, the city can be either Redwood Shores or Redwood City. In this case, you should also select at least the City geography type for address or tax validation.

## Address Validation Control

You can select the address validation level for a country. Validation will check if the entered address maps to the geography hierarchy data available for the country, and the address validation control determines whether you can save an address that didn't pass validation during address entry. For example, if the validation level is **Error**, then an address can't be saved if the values don't match the geography hierarchy data.

These are the address validation levels you can choose:

- Error** - only completely valid addresses can be saved, with all mandatory address elements entered.
- No Validation** - all addresses can be saved including incomplete and invalid addresses.

Regardless of the result of validation, the validation process will try to map any address attribute to a geography of the country, and store any mapping it could establish based on the available data. This is called **Geography Name Referencing** and it's executed as part of validation. The result of this referencing is used in several business processes in the application to map an address to a specific geography or zone. Therefore, Geography Name Referencing is the process of validating and mapping address elements of existing location table records against master reference geographies. For example, CA value in the STATE column of the HZ\_LOCATIONS table is mapped to the master reference geography of CA (California).

The Geography Dimension value in territories is derived from sell-to addresses of sales accounts. To use geography dimensions in territories, you must validate the geography elements in the addresses, such as state, city, and postal code. You can validate the address by enabling geography validation for each country using the Manage Geographies task. Perform the following in the Manage Geographies task:

- Enable at least one level in the geography hierarchy for geography validation.
- Enable geography validation for all geography levels that you intend to use for territory definition for each country.
- If needed, enable a list of values containing specific geography elements. This will help users search and select appropriate geography values during addresses entry and eliminate all possibilities of wrong address entry.

You can set geography validation control to Error in the Manage Geography Validation page. This ensures that users can only use valid geography elements in addresses.

**Note:** If you have already created addresses before setting up address validation for a country, you must enable geography validation and then execute the *Validate Geographies of Addresses Against Master Geographies* task for that country. This validates all your geography elements.

#### Related Topics

- [How can I save an address that didn't pass geography validation?](#)
- [Setting Up Geography Validation](#)
- [How do I validate geographies of addresses against master geographies and generate naming references?](#)

## Setting Up Geography Validation

You must set up geography validation to enable geography setup, help users fill in missing address information, and validate address information. For example, if you enter the postal code you can retrieve the rest of the address, such as, city and state.

For example, an organization named Vision Corp., 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.

To define geography validation for Vision Corp.:

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for **Manage Geographies**.
3. Search for a country. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking Search. Search for a country. 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, such as United States, in the Search Results area.
5. Click the **Go to Task** button in the Validation Defined column.

The Manage Geography Validation page appears. The geography types available for the country are shown in the Geography Mapping and Validation region.

6. 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.
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 user interfaces. For example, for Vision Corp, select **Enable List of Values** for State.

This ensures correct values are entered for states, so that territory assignments work.

**Note:** You should only enable a list of values if you have sufficient geography data for that geography type.

8. Select **Geography Validation** for a geography type to include it in geography validation. For example, for Vision Corp, select **Geography Validation** for State.

**Manage Geography Validation: United States**

**Address Style**

Actions ▾ View ▾ Format ▾ + Freeze Wrap

Address Style Format

No Styles Format

**Address Style Format Mapping: No Styles Format**

**Geography Mapping and Validation**

| Geography Type | Map to Attribute | Enable List of Values               | Tax Validation           | Geography Validation                |
|----------------|------------------|-------------------------------------|--------------------------|-------------------------------------|
| State          | State ▾          | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> |
| County         | County ▾         | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| City           | City ▾           | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |
| Postal Code    | Postal code ▾    | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/>            |

**Geography Validation Control**

Geography Validation Level for Country

You must enable geography validation for all geography levels that you intend to use for territory definition. The territory assignments may fail if the geography data used isn't validated. If Vision Corp. decided to set up territories at the postal code level, it would have to set up validation for state, city, county, and postal code.

**Note:** If an address element isn't selected for geography validation usage, then during address entry suggested values will be provided for the address element, but the address element isn't validated.

9. Select the appropriate geography validation control level to determine whether you can save an address that fails validation during address entry. For example, Vision Corp. wants to save all addresses including incomplete and invalid addresses, so select **No validation** in the Geography Validation Level for Country list.

**Note:** If Vision Corp. decided to save only valid addresses, it would have to set the geography validation control level to **Error** in the Geography Validation Level for Country list.

10. Click **Save and Close**.

## Best Practices for Geography Validation

After geography data setup, you must configure geography validations.



Here are some best practices to configure geography validation:

- The configuration of geography validation rules depends upon your application needs. If you want to ensure that only valid addresses must be allowed:
    - a. Navigate to Manage Geographies, search for a country, and click Validation Defined.
    - b. Set Geography Validation based on the application requirements.
- Note:** For either the tax or geography validation, don't skip more than one consecutive level unless you're certain that the selected geography types can uniquely identify geographies. For example, the United States country structure is: State, County, City, and Postal Code, and you want to select just State and Postal Code for geography or tax validation. However, for the combination of California and 94065, the city can be either Redwood Shores or Redwood City. In this case, you should also select at least the City geography type for geography or tax validation.
- c. Set the Geography Validation Level for Country in the Geography Validation Control section to Error.
  - If you require validated addresses for your downstream applications:
    - a. Go to Manage Geographies, search for a country, and click Validation Defined.
    - b. The best practice is Enable List of Values and setup validation for all geography levels and geography types.
    - c. Run the Validate Geographies of Addresses Against Master Geographies scheduled process to review address validation results.
  - To ensure that the addresses are validated and there are no downstream impacts:
    - a. Go to Manage Administrator Profile Values and set the Number of workers for a given Geography Name Referencing request (HZ\_GNR\_NUM\_OF\_WORKERS) profile option to 5.
    - b. Run the Validate Geographies of Addresses Against Master Geographies scheduled process with Parameters: Location Table Name: HZ\_LOCATIONS, Run Type: ALL, Country Code: [Country code for which Geography Name Referencing (GMR) needs to be generated].
    - c. Run the Validate Geographies of Addresses Against Master Geographies scheduled process with Parameters: Location Table Name: PER\_ADDRESSES\_F, Run Type: ALL, Country Code: [Country code for which GMR needs to be generated].
    - d. You can then use the report: to identify if the existing addresses are incorrect. Correct these addresses as a onetime activity.

## How do I manage Geography Structures, Hierarchies, and Validation?

You can add geography structure by first defining the geography types using the Manage Geographies task. You can then create geography hierarchy and geography validations also using the Manage Geographies task.

This example shows how you can configure the geography structure, geography types within the structure, geography hierarchy, and geography validation for a country geography, using the United Kingdom country geography as an illustration.

The following table summarizes the key decisions for this scenario.

| Decisions to Consider                                                       | In This Example                                                                                                                                                                |
|-----------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Copy an existing country structure?                                         | No, create a new country structure.                                                                                                                                            |
| What is the structure of the geography types?                               | Create geography types with the following ranking structure:<br><ol style="list-style-type: none"><li>1. County</li><li>2. Post Town</li></ol>                                 |
| What is the geography hierarchy?                                            | Create the following hierarchy:<br><ol style="list-style-type: none"><li>1. Country of United Kingdom</li><li>2. County of Berkshire</li><li>3. Post Town of Reading</li></ol> |
| Which address style format will you use when mapping geography validations? | The default address style format called the No Styles Format.                                                                                                                  |
| Are you using Oracle Fusion Tax for tax purposes?                           | No, don't select Tax Validation for the geography types.                                                                                                                       |

## Define the Geography Structure

You can add the County and Post Town geography types to the United Kingdom geography structure.

1. On the Manage Geographies page, enter GB in the **Code** field. Click **Search**.
2. On the Manage Geographies page, click **Structure Defined**.
3. On the Manage Geography Structure page, click the **Create** button next to the **Copy Country Structure From** field.
4. In the Geography Structure section, select the County list item in the **Add Geography Type** field.
5. Click **Add**.
6. Select the Post Town list item in the **Create and Add Geography Type** field.
7. Click **Add**.
8. Click **Save and Close**.

**Note:** You can't modify or delete a geography type.

## Define the Geography Hierarchy

You can add the geographies for the County and Post Town geography types using the geography hierarchy user interfaces to create the geography hierarchy for United Kingdom. You can also use Import Management to import geography hierarchies using a CSV or XML file.

1. On the Manage Geographies page, enter GB in the **Code** field. Click **Search**.

2. On the Manage Geographies page, click **Hierarchy Defined**.

**Note:** If there are many child geographies for the selected parent geography, a message asking you to refine the search criteria is displayed. The child geographies are displayed after you refine the search criteria. If there are many search results, you may have to further refine the search criteria. The maximum number of child geographies that can be displayed is controlled by the `ORA_HZ_GEO_HIERARCHY_LIMIT` profile option. You can change the value of this profile option by navigating to the Setup and Maintenance work area, click the Tasks menu, and search for Manage Administrative Profile Values task. Search for the `ORA_HZ_GEO_HIERARCHY_LIMIT` profile option and change the value.

3. In the Geography Hierarchy section, click United Kingdom to highlight the table row, and click **Create**.
4. In the **Create County** page, Primary and Alternate Names section, enter Berkshire in the **Name** field.
5. Click **Save and Close**.
6. In the Geography Hierarchy section, click Berkshire to highlight the table row, and click **Create**.
7. In the **Create Post Town** page, Primary and Alternate Names section, enter Reading in the **Name** field.
8. Click **Save and Close**.

## Define the Geography Validations

You can define the geography mapping and validation for the United Kingdom default address style format to specify the geography validations for the geography types you added to United Kingdom. You can then map the geography types to attributes, enable the geography types for Lists of Values and Geography Validation, and set the geography validation level.

1. On the Manage Geographies page, click **Validation Defined**.
2. In the Address Style section, click **No Styles Format** to highlight the table row.
3. For the County geography type, click the **County** list item in the **Map to Attribute** field.
4. Select the **Enable List of Values** and **Geography Validation** options.
5. For the Post Town geography type, click the **City** list item in the **Map to Attribute** field.
6. Select the **Geography Validation** option.
7. In the Geography Validation Control section, select **Error** in the **Geography Validation Level for Country** list.
8. Click **Save and Close**.

## Considerations While Working With Master Geographies

Considerations for working with master geographies:

- You can update master geographies using the Manage Geographies page, but you can't update master geographies using Import Management.
- Countries are predefined so you can't delete them. You can delete the geography levels of a country in the geography hierarchy, such as state, city, and so on using the Manage Geographies page.
- If you delete the geography levels of a country in the geography hierarchy, such as state, city, and so on, you must manage the impact of these changes in the downstream applications, such as SCM, ERP, HCM, and so on.
- If you delete a geography level, all the children in that geography hierarchy are also deleted. For example, if you define city and postal codes under a state, and you later delete the state, all the cities and postal codes under this state are also deleted.

## Manage Geography Lookups

You can manage geography lookups using the Manage Geography Lookups.

Perform these steps:

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area and go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Geography Lookups
2. On the Manage Geography Lookups page, click any of the following lookups:

| Lookup Type                   | Meaning                                     | Description                                                                                                                                                                                                         |
|-------------------------------|---------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| HZ_GEOGRAPHY_USAGE            | Geography Validation Purpose                | Purpose of geography validation, for example, tax. This lookup type can't be edited.                                                                                                                                |
| HZ_GEO_DISPLAY_ONLY           | Zone Definition                             | Interface elements used to define zones. This lookup type can't be edited.                                                                                                                                          |
| HZ_GEO_GNR_RUN_TYPE           | Geography Name Referencing Program Run Type | You can specify the type of records that must be processed using the geography name referencing (Validate Geographies of Addresses Against Master Geographies) scheduled process. This lookup type can't be edited. |
| HZ_GEO_IDENTIFIER_TYPE        | Geography Identifier Type                   | Identifier type for geography, for example, name or code. This lookup type can't be edited.                                                                                                                         |
| HZ_GEO_POSTAL_CODE_RANGE_FLAG | Postal Code Range Provided                  | Values indicate whether a postal code range was used to define a set of postal codes. This lookup type can't be edited.                                                                                             |
| HZ_GEO_DATA_PROVIDER          | Geography Information Provider              | Names of the source of geography information. You can add new geography providers.                                                                                                                                  |
| HZ_GEO_IDENTIFIER_SUBTYPE     | Geography Identifier Subtype                | Identifier sub type for geography, for example, primary. You can specify the                                                                                                                                        |

| Lookup Type | Meaning | Description                                            |
|-------------|---------|--------------------------------------------------------|
|             |         | primary and secondary names and codes for geographies. |

3. View or edit the values as applicable.
4. Click Save and Close to return to the list of lookups.
5. Click Done to exit the page.

## Geography Profile Options

This topic lists geography profile options, descriptions, default values, and the impact these profile options have on different aspects of geographies.

This topic also lists address profile options that impact geographies.

To view the details of these profile options:

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for **Manage Administrator Profile Values** task and open it.
3. Search using the profile option code.

To change the default values of these profile options:

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for **Manage Administrator Profile Values** task and open it.
3. Search using the profile option code.
4. Change the profile value.

| Profile Option Code        | Profile Option Name             | Default Value | Description                                                                                                                                                                                                                                              | Impact                                                                                                    | Related Topics                                                                                                                                              |
|----------------------------|---------------------------------|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| HZ_POST_IMPORT_GNR_INVOKE  | Address Validation After Import | Y             | Runs the Geography Name Referencing (GNR) process after geography data import. The recommended value for this profile option value is N. This helps improve the import performance. After setting this to N, GNR process isn't invoked for every import. | This profile option is applicable to File-based Import (used in high volume import) and Import Management | See <i>How do I validate geographies of addresses against master geographies and generate naming references?</i>                                            |
| ORA_HZ_GEO_HIERARCHY_LIMIT |                                 | 100000        | Specify the maximum number of nodes that each parent node can handle for any geography element.                                                                                                                                                          | This profile option is applicable to Application UI and Import Management (only for geography object)     | See, <i>What are the best practices for managing Geography mismatches?</i><br><br><i>How do I manage Geography Structures, Hierarchies, and Validation?</i> |

| Profile Option Code         | Profile Option Name                                                     | Default Value                                                  | Description                                                                                                                                                              | Impact                                                                                                             | Related Topics                                                                                                                                                                           |
|-----------------------------|-------------------------------------------------------------------------|----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ORA_HZ_ENABLE_DAAS_LOQATE   | DaaS GBG   Loqate Data Import Enabled                                   | Yes                                                            | Enable the import of DaaS GBG   Loqate geography information.                                                                                                            | This profile option is applicable to Scheduled Process, Application UI, and Import Management                      | see, <a href="#">How to Import Nokia Geography Data</a>                                                                                                                                  |
| ORA_HZ_DAAS_GEO_ENDPOINT    | DaaS Geography Server Endpoint Information                              | <code>https://geo.daas.us-phoenix-1.ocs.oraclecloud.com</code> | Specify the endpoint information, such as the host name and the port number, of the DaaS geography server.                                                               | This profile option is applicable to Application UI and REST                                                       |                                                                                                                                                                                          |
| HZ_SHARE_LOCATIONS          | Location Sharing Mode                                                   | Share among all parties                                        | Select if location can be shared among different persons and organizations.                                                                                              | This profile option is applicable to File-based Import. This profile option isn't applicable in Import Management. |                                                                                                                                                                                          |
| HZ_LANG_FOR_COUNTRY_DISPLAY | Language for Country Display                                            |                                                                | Specify the default language used to translate the country name for international addresses. This is typically the language of the country where an item is mailed from. | This profile option is applicable to Application UI and REST                                                       |                                                                                                                                                                                          |
| HZ_GEOCODING_BATCH_SIZE     | Geocoding Subprocess Batch Size                                         | 1000                                                           | Specify the maximum number of locations that each batch subprocess can handle for geocoding.                                                                             | This profile option is applicable to Scheduled Process                                                             |                                                                                                                                                                                          |
| HZ_GNR_NUM_OF_WORKERS       | Number of workers for a given Geography Name Referencing request        | 1                                                              | Determines the number of sub-processes for Validate Geographies of Addresses Against Master Geographies scheduled process.                                               | This profile option is applicable to Scheduled Process                                                             | See <a href="#">Best Practices for Geography Validation</a><br>See <a href="#">How do I validate geographies of addresses against master geographies and generate naming references?</a> |
| HZ_GNR_COMMIT_SIZE          | Batch Size for committing records in Geography Name Referencing process | N/A                                                            | The Batch Size for committing records in Geography Name Referencing process                                                                                              | This profile option is applicable to Application UI, Scheduled Process, File-based Import, and Import Management.  | See <a href="#">How do I validate geographies of addresses against master geographies and generate naming references?</a>                                                                |

Here are the list of address profile options:

| Profile Option Code              | Profile Option Name                                  | Default Value  | Description                                                                                                                               | Impact                                                       | Related Topics                                                                                    |
|----------------------------------|------------------------------------------------------|----------------|-------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------|
| HZ_UPDATE_STD_ADDRESS            | Update Standardized Addresses Enabled                | No             | Enable to allow the update addresses that are already standardized using postal information.                                              | This profile option is applicable to Application UI and REST |                                                                                                   |
| ORA_HZ_INCLUDE_REGIONAL_COUNTRY  | Regional Country in Address Formats Included         | No             | Enable address format functions to include regional country. You must set the value to yes to include regional country.                   | This profile option is applicable to Application UI          | See, <i>How to have different contact address fields depending on the country selected?</i>       |
| HZ_DEFAULT_ADDR_STYLE            | Address Style Default                                | Postal Address | Specify a default style for address formatting.                                                                                           | This profile option is applicable to Application UI and REST |                                                                                                   |
| HZ_ADDRESS_DISABLE_ALT_NAMES     | Hide Alternate Address Names                         | No             | Hide alternate names in the Address list of values. This option, when enabled, displays only the primary geography names for the address. | This profile option is applicable to Application UI          |                                                                                                   |
| ORA_HZ_IMPORT_MULTI_ADDRESS_TYPE | Import Processing for Multiple Address Types Enabled | Yes            | Enable the processing of multiple address types for Account, Contact, Address, Organization, and Person objects.                          | This profile option is applicable to Import Management       | See <i>Import Your Household Data How do I import account data? How do I import contact data?</i> |

## What are the best practices for managing Geography mismatches?

This topic employs a couple of use cases to illustrate the best practices for setting up Master Reference Geographies for sales customers using the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) for Sales for data enrichment and the Oracle Address, Email, and Phone Verification for address, email, and phone number verification.

When you perform the real-time enrichment of accounts or contacts using the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B), if there's a geography data mismatch between the predefined master geography data and the Dun and Bradstreet (D&B) data, then the Service enriches the accounts and contacts data but you can't edit or save the enriched data unless the master geography data mismatches are resolved. In addition, you can verify the enriched address using the Oracle Address, Email, and Phone Verification, however, in case of mismatches between Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) (Loqate) and predefined master geography data you can't save the verified address.

The second use case describes the setup required to enable address verification and to avoid data conflicts between the Oracle Address, Email, and Phone Verification and master reference geography data.

## Use Case 1

You're a sales customer using master reference geographies for territory assignments or tax calculation and have purchased Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) for data enrichment and Oracle Address, Email, and Phone Verification. In this case, while the Loqate geography reference data is configured as master geography, Tax calculation is being done using Vertex master geography data. Also, address validation is enabled based on the customer's requirement.

**Best Practice:** Review geography mapping for the countries where you do business. If the geography mapping for a specific country isn't mapped according to the country-specific address attributes, update the mapping. Oracle recommends performing enrichment before verifying address.

Suppose that you're doing real time enrichment of account or contact. If there's a geography data mismatch between the predefined master geography and the D&B data, the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) still enriches the accounts and contacts data but can't edit or save the enriched account or contact unless the master geography data mismatches are resolved. However, you can verify the enriched address using the Oracle Address, Email, and Phone Verification.

To save a verified address that has master geography data mismatch, you must add alternative names for the mismatched hierarchy elements in master geography. The following are the steps to add alternative name for the mismatched hierarchy element:

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Customer Data Management
  - o Functional Area: Enterprise Profile
  - o Task: Manage Geographies
2. On the Manage Geographies page, search for the country by the name or country code, for example US.
3. Click the Go to Task button in the Hierarchy Defined column. The Manage Geographies Hierarchy page for the particular country appears.

**Note:** If there are many child geographies for the selected parent geography, a message asking you to refine the search criteria is displayed. The child geographies are displayed after you refine the search criteria. If there are many search results, you may have to further refine the search criteria. The maximum number of child geographies that can be displayed is controlled by the ORA\_HZ\_GEO\_HIERARCHY\_LIMIT profile option. You can change the value of this profile option by navigating to the Setup and Maintenance work area, click the Tasks menu, and search for Manage Administrative Profile Values task. Search for the ORA\_HZ\_GEO\_HIERARCHY\_LIMIT profile option and change the value.

4. Highlight the mismatched hierarchy element, for example California State, and click the Edit icon.
5. Click the Add icon on the Edit page.
6. Add an alternative name CA for the California state geography element.
7. Click Save and Close

Once the alternative name is added for the mismatched hierarchy element in master geography, you can save the enriched address.



## Use Case 2

You're a sales customer who doesn't use geographies for territory assignment or tax calculation and has purchased Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) for data enrichment and the Oracle Address, Email, and Phone Verification for address verification. To enable address verification and to avoid data conflicts between the Oracle Address, Email, and Phone Verification and master reference geography data you must do the following setups:

- Deselect the Geography Validation option in the Geography Mapping and Validation region to avoid Oracle Address, Email, and Phone Verification data conflicts with master reference geography data. By deselecting this option you can avoid any UI level validation against master geographies while adding address.
- Select Geography Validation Level for Country as No validation to verify address data by Oracle Address, Email, and Phone Verification.

Perform the following steps on the Manage Geography Validation page to enable address verification and to avoid data conflicts between the Oracle Address, Email, and Phone Verification and master reference geography data:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Customer Data Management
  - Functional Area: Enterprise Profile
  - Task: Manage Geographies
2. On the Manage Geographies page, search for the country by the name or country code, for example US.
3. Click the Go to Task button in the Validation Defined column. The Manage Geography Validation page appears.
4. Deselect the Geography Validation check boxes for all the geography attributes to avoid any UI level validation against master geographies while entering the addresses. If the Enable List of Values check boxes are selected then, in case of data conflicts, Geography Naming References records aren't created.

**Note:** If any of the Geography Types listed isn't applicable to the selected country's territory structure, then you must deselect the geography validation for that type.

If you're planning to create territories based on a particular Geography Type, such as County, then you must deselect all the Geography Validation levels under that Geography Type (in this case City and Postal Code) based on which you want to create the territory.

**Tip:** Review the Address Style Formats that are selected on the Manage Geography Validation page. The review is required because on the Account or Contact Simplified UI page, address attributes are displayed based on the address formats and verified or enriched addresses are saved in Oracle Applications Cloud based on the selected address formats.

### Related Topics

- 

## Overview of Zone Types and Zones

Geography hierarchy is a data model that creates conceptual parent-child relationships between geographies.

Geography hierarchies can be classified as follows:

- **Master Reference Geography Hierarchy:** This refers to the predefined geography hierarchy and is considered as the source of truth. It is defined by widely recognized administrative or political boundaries such as States, Provinces, Counties, Cities, and so on. This hierarchy can be obtained from a supplier or manually entered. This geography hierarchy is the source when validating addresses or importing data. Examples are the State of California, the Province of Alberta, The Country of India, and so on.
- **User Defined Geography Hierarchy:** This refers to geography hierarchy defined by the user. This geography hierarchy may be created using the Master Reference Geography, obtained from a supplier, or entered manually. A user-defined geography hierarchy can have:
  - Zone Types
  - Zones

## Zone Types

Zone types categorize and group zones together, for example, the zone types of Income Tax and Shipping Regions.

Zone types need to be created before you define a zone for the geographical boundary. You can create a zone type which will contain geographical boundaries from anywhere in the world, or you can create a zone type that will only contain geographies from within a specified country. When you create a zone type that's bounded by a country you can define which geography types or geographies you will be able to choose when you create a zone.

## Zones

Zones are geographical boundaries for a zone type, for example, the San Jose Tax zone. Zones are based on the master reference geography hierarchy data.

Zones are created within a zone type, and you can associate geographies to define the zone. For example, for the Shipping Regions zone type you can create a West Coast zone which has the state of California as one of its geographies. Within a geography you can specify a postal range. So, for the state of California, for example, you can specify that the zone spans from postal code 90001 to 90011.

## Zones Created in Master Geographies

Here is the list of zones created using master geographies in each product offering and the tasks to load them:

| Product Offering      | Task Name                    |
|-----------------------|------------------------------|
| Territory Geographies | Manage Territory Geographies |
| Tax                   | Manage Tax Zone Types        |
| Shipping              | Manage Shipping Zones        |
| Compensation          | Compensation Zones           |

**Note:** There are no bulk loaders for loading these zones.

For more information about creating zone types and zones, see the Related Topics section.

#### *Related Topics*

- [Manage Zone Types and Zones for Shipping and Tax](#)
- [Configure Compensation Zone Types and Zones](#)

## Import Geographies and Zones

### How do I import geographies?

A geography, such as Tokyo or Peru, describes a boundary on the surface of the earth.

You can use the following options when importing geographies:

- Oracle-licensed geography reference data
- Import Management

**Note:** The processing time for importing geography data can vary based on several variables, such as, the volume of data to be loaded and it could take several hours to complete.

### Oracle-Licensed Geography Reference Data

You can import Oracle-licensed data from Loqate, for those countries where the data is available. For more information about the supported countries, see the [List of Available Countries with Loqate Geography Reference Data](#) topic. You can import geography data using the **Manage Geographies** task. Search for the country, and select **Import Geography Data** from the **Actions** menu. If the licensed data isn't available or already set up for a particular country, then the **Import Geography Data** action is disabled.

**Note:**

- If you are licensed to use HCM Cloud Payroll for the United States, you must import your geography data from Vertex. For more information, see the United States Payroll implementation and administering guides.
- If you are licensed to use HCM Cloud Payroll for Canada, you can import your geography data from either Loqate, or your own geography data vendor. Loqate is the Oracle-licensed geography vendor across all Oracle applications, but it isn't mandatory. You may use any other geography vendor, but it must be comparable in structure by using a 2-character province code. For more information, see the Canada Payroll implementation and administering guides.
- By exporting this "Geography" data from the Oracle environment to Your environment, You agree that (a) Oracle is granting You only a restricted right to download the exported data specifically for Your use with the Oracle Fusion services, (b) this data may not be used, transferred, or uploaded for any other purposes; and (c) except for the restricted right granted in (a), all provisions of the Oracle Cloud Services Agreement (CSA) or Schedule C, as applicable to You, remain in full force and effect, including specifically section 3.4 thereof.
- Geography Round-Trip Export Import is currently not supported.

## Import Management

The Import Management process reads the data included in your XML or text file and imports the data into the application.

To access Import Management functionality, go to **Navigator > Tools > Import Management**

For more information, see the Import Your Geography Data topic.

Import Geography Data is disabled for a country if the geography data for that country isn't available from Loqate or if the geography structure or hierarchy is already defined for that country. The existing master geography hierarchy can be from Loqate or non-Loqate. For example, Pakistan isn't supported currently in the supported list of 82 countries. If you try to import geography data for Pakistan after defining geography structure or geography hierarchy for it, Pakistan would be greyed out in the import list.

### *Related Topics*

- [Overview of Implementing Customer Data Management](#)
- [Setup Data Import and Export for Oracle Accounting Hub Cloud](#)
- [Create Legal Jurisdictions, Addresses and Authorities](#)

## List of Available Countries with Loqate Geography Reference Data

Oracle Applications Cloud provides third-party Loqate geography data for import. Here's the list of countries for which the Loqate geography data is available for import.

| Country Name           | Country Code |
|------------------------|--------------|
| Andorra                | AD           |
| Angola                 | AO           |
| Argentina              | AR           |
| Australia              | AU           |
| Austria                | AT           |
| Belgium                | BE           |
| Bolivia                | BO           |
| Bosnia and Herzegovina | BA           |
| Brazil                 | BR           |
| Bulgaria               | BG           |
| Canada                 | CA           |
| Cayman Islands         | KY           |
| Chile                  | CL           |
| China                  | CN           |
| Croatia                | HR           |
| Cuba                   | CU           |
| Cyprus                 | CY           |

| Country Name       | Country Code |
|--------------------|--------------|
| Czech Republic     | CZ           |
| Denmark            | DK           |
| Dominican Republic | DO           |
| Ecuador            | EC           |
| Estonia            | EE           |
| Finland            | FI           |
| France             | FR           |
| Germany            | DE           |
| Great Britain      | GB           |
| Greece             | GR           |
| Guadalupe          | GP           |
| Guam               | GU           |
| Guernsey           | GG           |
| Hungary            | HU           |
| Iceland            | IS           |
| India              | IN           |
| Indonesia          | ID           |
| Ireland            | IE           |
| Isles of Man       | IM           |
| Israel             | IL           |
| Italy              | IT           |

| Country Name  | Country Code |
|---------------|--------------|
| Jamaica       | JM           |
| Japan         | JP           |
| Jordan        | JO           |
| Kenya         | KE           |
| Latvia        | LV           |
| Liechtenstein | LI           |
| Lithuania     | LT           |
| Luxembourg    | LU           |
| Malaysia      | MY           |
| Malta         | MT           |
| Martinique    | MQ           |
| Mexico        | MX           |
| Netherlands   | NL           |
| New Zealand   | NZ           |
| Norway        | NO           |
| Oman          | OM           |
| Peru          | PE           |
| Poland        | PL           |
| Portugal      | PT           |
| Puerto Rico   | PR           |
| Qatar         | QA           |

| Country Name         | Country Code |
|----------------------|--------------|
| Reunion Island       | RE           |
| Romania              | RO           |
| Russia               | RU           |
| San Marino           | SM           |
| Singapore            | SG           |
| Slovakia             | SK           |
| Slovenia             | SI           |
| South Africa         | ZA           |
| South Korea          | KR           |
| Spain                | ES           |
| Sri Lanka            | LK           |
| Swaziland            | SZ           |
| Sweden               | SE           |
| Switzerland          | CH           |
| Taiwan               | TW           |
| Thailand             | TH           |
| Tunisia              | TN           |
| Turkey               | TR           |
| United Arab Emirates | AE           |
| United States        | US           |
| Uruguay              | UY           |



| Country Name | Country Code |
|--------------|--------------|
| Vatican City | VA           |
| Vietnam      | VN           |

## How do I replace the existing master geography data with revised Oracle-Licensed geography data?

You must import and set up reference geography data for the countries where you do business.

Using the Oracle-licensed geography reference data, you no longer have to source geography data from a third party. You can import Oracle-licensed data from Loqate, including the country structure and hierarchy information, either to create a new geography setup or replace your existing geography data.

All customers with the exception of United States HCM Payroll customers, can use the information in this section to replace existing geography data with Loqate geography data. You can follow these steps if you're using Nokia or any other geography data and now want to move to Loqate geography data.

Before you begin, perform the following steps:

- Backup existing geography data including customizations, if any.
- Backup territory geographies.
- Perform impact analysis by contacting the support team to identify the use of geography IDs downstream.

**Note:** Before deleting the geography data, make sure that GEOGRAPHY\_ID isn't referenced in any downstream applications such as TAX, FIN, Legal, and so on. Geography data is used across Oracle Cloud applications such as Human Capital Management, TAX, and Legal. Global Single Instance POD users share the same geography data and before deleting geography data, the geography usage POD analysis is required. The Oracle Support team can help you identify the downstream impact.

### Create an Export File of All Territories

In case you have implemented Customer Data Management along with the sales functionality, you must export all territories before deleting the master geography data because removing the master geography data invalidates the territory definitions that are based on the Geography dimension. You can either export the definitions of all territories to a file or make manual corrections. If there are a large number of territories, export the territories definition to a file for the territories import process. However, if there are very few affected territories, then you can choose to either export the territories definition to a file or make corrections manually.

This procedure is applicable only if there are territories defined using the Geography dimension.

Perform the following steps to create an export file of all territories.

1. From the Territories and Quotas work area, click **View Active Territories** in the Tasks pane.
2. In the View Active Territories page, select the territory at the highest level.
3. Click the **Actions** list, and select **Export**, and then **Export Selected Territory Hierarchy**.
4. In the Warning dialog box, click **OK**.

5. Click the **Actions** list and select **Export**, and then **View Export Status**.
6. Review the status of the export job and verify if it has completed successfully.
7. In the Exported Data File column, click the .zip file against your export job, and click **Save**. All the territories are exported to a compressed file on your system.
8. Click **OK**.
9. Click **Done** in the View Active Territories page.

## Delete the Territory Geography Data

A territory definition has references to the territory geography data and master geography data. Territory geography data is based on the master geography data, in case you have implemented Customer Data Management along with the sales functionality, you must delete the territory geography data prior to deleting the master geography data. When you delete the territory geography data, all territories that are defined using geography dimension become invalid.

This procedure is applicable only if territory geographies are defined.

Perform the following steps to delete the territory geography data.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Territories
  - Task: Manage Territory Geographies
2. On the Manage Territory Geographies page, click **View All Hierarchies**.
3. Select the highest level node for the country for which you want to replace the master geography data and click the **Delete** icon.
4. In the Warning dialog box, click **OK**.
5. In the Confirmation dialog box, click **OK**. The parent node of the territory geography data and its children are deleted.
6. Repeat steps 3 to 5 to delete all the higher nodes in the territory geography data.
7. Click **Save and Close**.

The Territory Management application retains a copy of the dimension members referenced in the territory definitions. This copy is updated when you trigger the **Load and Activate** process from the **Enable Dimensions and Metrics** task. Therefore, although the territory geography data is deleted, the territory definitions may appear to remain valid.

## Delete the Master Geography Data

Delete the existing geography data one country at a time. We recommend that you raise a service request for assistance in deleting the geography data.

### Delete Geography Structure

If you have created a geography structure, it prevents the geography imports from working or working as desired. For example, if the geography structure exists, the Import Geography option may not be enabled for a country in Manage Geographies even if Loqate predefined geography data is available for that country and the geography hierarchy doesn't exist yet.

**Note:** If any geography hierarchy was created manually, it must be deleted first.

If the geography structure was created manually, you can follow these steps to delete it. However, we recommend that you raise a service request for assistance in deleting the geography structure.

1. In the Setup and Maintenance work area, go to the following:

- Offering: Customer Data Management
  - Functional Area: Enterprise Profile
  - Task: Manage Geographies
2. On the Manage Geographies page, enter either the country name or the two-letter ISO code (for example, US), and click Search.
  3. Select the country in the search results and click **Actions > Manage Geography Structure**.
  4. In the Manage Geography Structure page, delete each level of the structure.
  5. Click Save and Close.

You can now proceed to importing geography data.

**Note:** If other setup or transaction data exists that's based on the geography data, replacement procedures for that setup must also be followed.

## Import Oracle-Licensed Geography Reference Data

Use this procedure to import Loqate geography data in Manage Geographies one country at a time. If the country data you want isn't supported by Loqate geography seed data and point the Loqate supported country list here, then the Import Geography Data action is disabled.

The geography data is provided by Loqate and is third-party content. As per Oracle policy, this software and documentation may provide access to or information about content and services from third parties. Oracle and its affiliates aren't responsible for and expressly disclaim all warranties of any kind with respect to third-party content and services. Oracle and its affiliates aren't responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.

Perform the following steps to import Oracle-licensed geography reference data.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Customer Data Management
  - Functional Area: Enterprise Profile
  - Task: Manage Geographies
2. On the Manage Geographies page, enter either the country name or the two-letter ISO code (for example, US), and click **Search**.
3. Select the country in the search results.
4. Click the **Actions** list, and select **Import Geography Data**.

**Note:** Import Geography Data is disabled for a country if the geography data for that country isn't available from Loqate or if the geography structure or hierarchy is already defined for that country. The existing master geography hierarchy can be from Loqate or non-Loqate.

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

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.

**Note:** To access the Scheduled Processes work area, you must be signed in as a user with the Employee abstract role. The initial user doesn't 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.

Next, click the **Validation Defined** icon to define the validations, enable List of Values, and choose address style format for a country as set up before. For more information, see the Geography Validation topic.

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're using Around Me functionality in CX Sales Cloud Mobile.
- Cleansing makes it possible to validate addresses down to the street level.

Add any geography customizations.

## Run the Geography Name Referencing Process

The Geography Name Referencing (GNR) process validates address elements in location tables, such as HZ\_LOCATIONS, against the master geography data.

Run the GNR process in the following situations:

- When you are using geography based address validation (not third party address validation services).
- GNR data is needed for your business processes (such as ERP Tax).

**Note:** Note: You can't update existing data, such as effective start date, in the GNR process tables for the locations.

Perform the following steps to run the GNR process.

1. Navigate to **Tools > Scheduled Processes** work area.
2. On the Overview page, click **Actions > Schedule New Process**.
3. Click the **Name** list and search for **Validate Geographies of Addresses Against Master Geographies**, and then click **OK**.
4. Click **OK** in the Schedule New Process dialog box.
5. In the Process Details dialog box, enter the following details:
  - **Location Table Name:** HZ\_LOCATIONS
  - **Run Type:** ALL
  - **Usage Code:** GEOGRAPHY
6. Enter the country code in the Country Code field.
7. Click **Submit**.
8. In the Confirmation dialog box, click **OK**.
9. Click **Close**.
10. In the Scheduled Processes page, click the **Refresh** icon.
11. Verify if the status of the process has completed successfully.

Find the locations failing in Geography Name References using: <https://cloudcustomerconnect.oracle.com/posts/b1e16b06ae>. Fix Geography Name References failures by updating addresses with the latest geography data.

## Recreate and Load the Territory Geography Data

In case you have implemented Customer Data Management along with the sales functionality, you can recreate the territory geography data, after the master geography data is imported, using either of the following methods:

- **Import process:** If you created the original territory geography data using the import process, then use the same import file to recreate the territory geography structure. For more information about importing the territory geography data using Import Management, see *Import Your Sales Territory Data* in the Oracle CX Understanding Import and Export Management for CX Sales and Fusion Service guide.
- **Manual creation process:** You can manually recreate the territory geography data structures, as they existed before their deletion, using the *Manage Territory Geographies* task. For more information about creating zones and adding geographies to a zone, see *Managing Territory Geographies* in the Related Topics section.

After you have recreated the territory geography data, perform the following steps to load the data.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Territories
  - Task: Enable Dimensions and Metrics
2. On the Enable Dimensions and Metrics page, click the **Actions** list, and select **Load and Activate**. The process loads the territory geography data to make dimension members available for selection when defining territories.
3. In the Confirmation dialog box, click **OK**.
4. Click **Done**.

## Restore the Invalid Territory Definitions

After recreating the territory geography hierarchies and running the Load and Activate option from the **Enable Dimensions and Metrics** task, the geography dimensions are populated with the new geography members. The geography members in the territory appear as invalid because your territories still reference the old copies of the dimension members that were deleted. The new members aren't referenced automatically by the territories. You must re-reference the territory definitions from the old geography dimension members to the new ones.

You can restore the invalid territory definitions by either importing the previously created export file or making manual corrections to the territories.

To restore valid territory definitions using territories import:

1. Open the export file you saved in the Creating an Export File of All Territories step. The compressed file contains four CSV files.
2. Open **TERR\_HEADER.CSV** file.
3. Enter **REPLACE** in the Action column for all territories that are based on geography dimension.
4. Save the file in CSV format and compress it together with three other CSV files.
5. From the Territories and Quotas work area, click **View Active Territories** in the Tasks pane.
6. Click the **Actions** list, and select **Import to Proposal**, and then **Import Territories**.
7. Select the newly created compressed file and click **OK**.
8. Click the **Actions** list and select **Import to Proposal**, and then **View Import Status**.
9. Review the status of the export job and verify if it has completed successfully.
10. Click **OK**.
11. From the Tasks pane, click **Manage Territory Proposals**.

12. In the Manage Territory Proposals page, on the Current Territory Proposals table, search for the proposal with your import file name.
13. Click the import file name to open the territory proposal.
14. Click **Edit Coverage** to verify that the territory definitions are valid.
15. Verify that there are no values listed as invalid in the Selected Dimension Members section.
16. Click **Save and Close**.
17. Click **Activate**. The territory proposal of your import file is activated.

To restore valid territory definitions through manual corrections:

1. From the Territories and Quotas work area, click **Manage Territory Proposals** in the Tasks pane.
2. In the Manage Territory Proposals page, click the **Create** icon.
3. In the Create Territory Proposals dialog box, enter a name and click **Save and View**.
4. In the Territory Proposals page, add all the territories with the Geography dimension value other than the value Any to the proposal.
5. Select a territory and click **Edit Coverage**.
6. In the Edit Coverage page, select **Geography** from the Dimensions list. The invalid dimension members are displayed in the Selected Dimension Members pane.
7. Expand the values in the Available Dimension Members section or search for the member that has the same name as the one marked invalid in the Selected Dimension Members pane.
8. Select one or more new geography dimension members from Available Dimension Members pane and click **Add** icon to the Selected Dimension Members pane.
9. Click the **Remove** icon to remove the invalid members from the Selected Dimension Members pane.
10. Click **Save and Close**.
11. Repeat steps 4 to 10 for all territories that were based on Geography dimension.
12. Click **Activate**. After the activation process is complete, your territory definitions are valid again and are referencing to the new geography data.

Although this method is always applicable, it's most appropriate when you have to restore territory definitions for a smaller number of territories.

To run the batch assignment process for opportunities:

1. From Navigator, click **Scheduled Processes**.
2. In the Schedule Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, search for the **Request Revenue Territory Assignment** process and select it.
4. Click **OK**.
5. In the Process Details dialog box, enter **OpenOpportunitiesByCreationDate** in the View Criteria Name field. This selects all revenue lines belonging to open opportunities that were created in the last 'X' days.
6. Enter **BindOpptyCreationDateFrom=** followed by the date.  
For example, if BindOpptyCreationDateFrom=2014-01-01, then all open opportunities which were created between 1st January 2014 till the current date, are processed.
7. Click **Submit** to schedule the process.
8. In the Confirmation dialog box, make a note of the process identifier for monitoring the process, and click **OK**.
9. Click **Close**.
10. In the Schedule Processes page, click the **Refresh** icon.
11. Review the status of the process job and verify if it has completed successfully.

**Note:** Review a small subset of the open opportunities to confirm that the territory assignment is as expected.

To run the batch assignment process for sales accounts:

1. Ensure that the **ZCA\_SA\_AUTO\_ASSIGN\_ON\_CREATE** and **ZCA\_SA\_AUTO\_ASSIGN\_ON\_UPDATE** profile options are set to Yes in the **Manage Customer Center Profile Options** task.
2. From Navigator, click **Customers**.
3. In the Customers page, click **Create Account**.
4. In the Create Account page, enter a name and address of the sales account, and select the **Address is sell to** check box.
5. Click **Save and Close**.
6. From Navigator, click **Customers**.
7. In the Search pane, search for the name of the sales account you created and select it.
8. In the section Customer Information, select **Sales Account Team**. The details of the sales account and territories associated with the sales account are displayed.

This indicates that the sales account was created successfully and the batch assignment was run automatically to assign the matching territories to the sales account.

To run the batch assignment process manually from the Scheduled Processes page, perform the following steps.

1. From Navigator, click **Scheduled Processes**.
2. In the Schedule Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, search for the **Request Account Assignment** process and select it.
4. Click **OK**.
5. Enter **SalesAccount\_Work\_Object** in the Work Object Code field and **SalesAccountTerritory\_Candidate\_Object** in the Candidate Object Code field.
6. Select **Territory** in the Assignment Mode list.
7. Enter **AllSalesAccountsVC** in the View Criteria Name field. This selects all sales accounts.
8. Click **Submit** to schedule the process.
9. In the Confirmation dialog box, make a note of the process identifier for monitoring the process, and click **OK**.
10. Click **Close**.
11. In the Schedule Processes page, click the **Refresh** icon.
12. Review the status of the process job and verify if it has completed successfully.

**Note:** Review a small subset of the accounts to confirm that the territory assignment is as expected.

Verify that the downstream applications using geography data is working fine.

## Create Countries

This procedure lists the steps to create countries in the application.

The countries are seeded in the application. If you're unable to find a specific country in the Manage Geographies page, then you can add it to the application.

**Note:** The application provides support for Loqate geography data for countries. For countries where Loqate geography data isn't available, you can purchase the geography data from a third-party data provider and load it into the application using Import Management. For more information, see the Import Your Data chapter in the Oracle CX Understanding Import and Export Management for CX Sales and Service guide. If countries aren't available in the application, then use the procedure outlined in this topic to create them.



Perform the following steps to create a new country.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Customer Data Management
  - Functional Area: Application Extensions
  - Task: Manage Territories
2. On the Manage Territories page, click the **New** icon.
3. Enter the following details:
  - Territory Code: Enter a unique code for the territory.
  - Territory Name: Enter a unique name for the territory.
  - Description: Enter a description for the territory.
4. Click **Save and Close**.

**Note:** After you have added a new country in the application, if you want to import the geography data for that country, then you must perform Step 5 to 10.

5. In the Setup and Maintenance work area, go to the following:
  - Offering: Customer Data Management
  - Functional Area: Enterprise Profile
  - Task: Manage Geographies
6. On the Manage Geographies page, click **Actions** > **Create Country**.
7. In the Create Country dialog box, select the name of the country and click **Save**.
8. Click **Done**.

**Note:** You can now import the geography data for the newly created country using Loqate geography data available in the application. In case geography data for your country isn't available from Loqate, you can purchase the geography data from a third-party data provider and import it using Import Management.

#### Related Topics

- [How do I replace the existing master geography data with revised Oracle-Licensed geography data?](#)

## How do I import Non-Oracle Licensed geography data?

You can use Import Management to create Geography data. It's recommended to use import management if you're importing Non-Oracle Licensed geography data or while loading your own geography from other vendors. You can also add alternate name or code to existing geographies with import. For more information see [Example of Importing Geography Data](#).

To import Geography data, perform the following tasks:

1. Map your source data to Oracle Applications Cloud object attributes.
2. Create source Comma Separated Values (CSV) file for import.
3. Create the import activity.



#### 4. Review the import results.

## How You Map Your Source Data to Object Attributes

To import your Geography data into Oracle Applications Cloud, you must populate a .csv file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Create Country Structure before importing Geography data. For information on how to create Country Structure, see [Import Your Country Structure](#) and [Example of Importing Country Structure](#) in Related Topics Section.
- Identify the target object attributes that are required in the CSV file for a successful import as mentioned in the table [Required Attributes and Validations for the Geography Object](#) below.

## Before You Start

You must do some basic checks before starting your import. For example, make sure that:

- You have completed all the prerequisites for importing each attribute in your source data such as creating a country structure.

## Required Attributes and Validations for the Geography Object

To import data successfully into Oracle Applications Cloud, your CSV file must include the required attributes. Ensure that you provide values for the attributes. The following table lists the required attributes for importing new Geography records, prerequisite setup tasks for the attributes, and specific validations, if any, for Geography import:

| Attribute            | Description                                                                                                                                                                                                                                                                                                                                                                      | Prerequisite Setup Task/ Import Validations                                                            | Creating a Geography Record |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------|-----------------------------|
| CountryCode          | The code of the country to which the geography belongs.                                                                                                                                                                                                                                                                                                                          | This is validated against the country structure to check if the structure is defined for this country. | Required                    |
| PrimaryGeographyName | The primary name of the geography.                                                                                                                                                                                                                                                                                                                                               | This is validated against the name of country if geography type is 'Country' or LevelNumber is 1.      | Required                    |
| RecordTypeCode       | The record type code that represents the intent of the import data. The values are: <ul style="list-style-type: none"><li>• 0 - indicates the geography that already exists in the base table.</li><li>• 1 - indicates the intent to create a new geography.</li><li>• 2 - indicates the intent to add an alternate identifying name or code to an existing geography.</li></ul> | No Validation                                                                                          | Required                    |

| Attribute      | Description                                                                                                                                                                                                                                                         | Prerequisite Setup Task/ Import Validations      | Creating a Geography Record |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|-----------------------------|
| LevelNumber    | The level number of the geography in the hierarchy. For example, Country is at Level 1 and State (California) is at Level 2.                                                                                                                                        | The level should exist in the country structure. | Required                    |
| SourceID       | The source ID for the geography, along with the parent source ID is used to identify the geography parent and child relationship within the source file data and the interface table data.                                                                          | None                                             | Required                    |
| ParentSourceID | The parent source ID for the geography, along with the source ID is used to identify the geography's parent and child relationship with records within the source file data. This should be null for the country record, as Country is at the top of the hierarchy. | None                                             | Required                    |

You can view the Geography object and attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on this Manage Import Objects page.

**Note:** Keep a note of the following:

- You can't update geographies via import.
- You can't add alternate names or alternate code of country via import. You can do so only via UI.
- Before adding a new alternate name, make sure that the alternate name does not exist with the same value for any other geography name.
- You can enable high-volume import for the Geography import object in the Manage Import Objects page.
- PrimaryGeographyCodeType and PrimaryGeographyCode can't be added after PrimaryGeographyName is created via import. You must create them together. Alternatively, you can add primaryGeographyCodeType and PrimaryGeographyCode from the UI after the import is complete.

## Create the Source CSV File

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator > Tools > Import Management > Import Objects**.
2. Select the **Geography** object in the table and click **Download**.

You can now edit the downloaded file and provide valid values for the required attributes.

**Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

## Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Geography from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.

## Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity.

**Note:** Geography names aren't translatable and are always displayed in the same language in which they were loaded irrespective of the language of the signed in user. If you need different options of display, you can use the alternative names option.

### Related Topics

- [Import Your Country Structure Data](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [Example of Importing Country Structure Data](#)
- [How do I import data?](#)
- [Example of Importing Geography Data](#)

## Example of Importing Geography Data

This example demonstrates how to import data using Import Management.

In this example, you have a source file containing geography data that you want to import into the application to make the geography data available for real time address validation and tax purposes. A geography is any region with a boundary around it, regardless of its size. It might be a state, a country, a city, a county, or a ward.

## Summary of the Tasks

You perform the following steps to create an import activity and activate the import:

1. Determine what information is in the source file.
2. Create and schedule the import activity.

## Before You Start

1. You use the country structure of a country to define which geography types are part of the country. For more information about an example of importing a country structure, see the topic "Example of Importing Country Structure Data".
2. Ensure that Source ID values are unique for each row of data within a single import.
3. Ensure that all the parents of a child geography are included in your data file so that the child geography can be added. For example, if you originally imported US, CA, and San Francisco, and now you want to import the city of San Jose in CA, then your data file must include US, CA, and San Jose.
4. Check that your source data file has the correct values for the geography data that you have already loaded. For example, if your initial import included the value US for country and CA as state, and in a subsequent import you have California as a state, then your geography import creates two state records (CA and California) in the application data, with the US as the country parent.

## Determine the Information in the Source File

The source geography data files must include a unique Source ID value for each row of data and Parent Source ID value for the parent of that row of data. You include the data that you want to import into CX Sales and Fusion Service in a source CSV file. A sample input CSV file for country as US is shown in this table.

| RecordTypeCode | PrimaryGeography | CountryCode | LevelNumber | Sourceld | ParentSourceld | LanguageCode |
|----------------|------------------|-------------|-------------|----------|----------------|--------------|
| 0              | United States    | US          | 1           | 1        | <blank>        | US           |
| 1              | California       | US          | 2           | 11       | 1              | US           |
| 1              | San Mateo        | US          | 3           | 111      | 11             | US           |
| 1              | Redwood City     | US          | 4           | 1111     | 111            | US           |
| 1              | 94065            | US          | 5           | 11111    | 1111           | US           |

Here is a sample CSV file to import geographies with alternate name and code for country India:

| RecordType | PrimaryGeogr | CountryCode | LevelNumber | Sourceld | ParentSourcel | IdentifierType | IdentifierSubT | IdentifierValue |
|------------|--------------|-------------|-------------|----------|---------------|----------------|----------------|-----------------|
| 0          | India        | IN          | 1           | 1        |               |                |                |                 |
| 1          | Karnataka    | IN          | 2           | 2        | 1             |                |                |                 |
| 1          | Bengaluru    | IN          | 3           | 3        | 2             |                |                |                 |

| RecordType | PrimaryGeogr | CountryCode | LevelNumber | Sourceld | ParentSourcel | IdentifierType | IdentifierSubT           | IdentifierValue |
|------------|--------------|-------------|-------------|----------|---------------|----------------|--------------------------|-----------------|
| 2          | Bengaluru    | IN          | 3           | 3        | 2             | NAME           | Standard_<br>Name        | Bangalore       |
| 1          | Whitefield   | IN          | 4           | 4        | 3             |                |                          |                 |
| 1          | 560066       | IN          | 5           | 5        | 4             |                |                          |                 |
| 2          | 560066       | IN          | 5           | 5        | 4             | CODE           | ISO_<br>COUNTRY_<br>CODE | 91              |

**Note:** Keep a note of the following:

- The hierarchy is modeled in the CSV file using the Sourceld and ParentSourcel. The ParentSourcel for the Country Record (level Number 1) is always null.
  - If defining an alternate name (**RecordTypeCode** = 2) for any level below the country (**LevelNumber** >1), ensure that the Sourceld and ParentSourcel columns match the values for the original record respectively.
  - You can't update geographies via import.
  - You can't add alternate names or alternate code of country via import. You can do so only via UI.
  - Before adding a new alternate name, make sure that the alternate name doesn't exist with the same value for any other geography name. You can check the existing values for alternate names in the Manage Geographies task page under Hierarchy Defined.
  - You can find the list of IdentifierSubTypes in Manage Geography Lookups page in the UI.
  - PrimaryGeographyCodeType and PrimaryGeographyCode can't be added after PrimaryGeographyName is created via import. (CSV) file to create them together. Alternatively, you can add PrimaryGeographyCodeType and PrimaryGeographyCode from the UI after the import is complete.
- You must create via import (CSV) file to create them together and alternatively you can add PrimaryGeographyCodeType and PrimaryGeographyCode from the UI after the import is complete.

| Attribute Name | Value | Description                                                                                                                                                                                                                                                                                                                                                                                 |
|----------------|-------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| RecordTypeCode | 1     | <p>The record type code that represents the intent of the import data. The values are:</p> <ul style="list-style-type: none"> <li>• 0 - indicates the geography that already exists in the base table.</li> <li>• 1 - indicates the intent to create a new geography.</li> <li>• 2 - indicates the intent to add an alternate identifying name or code to an existing geography.</li> </ul> |

| Attribute Name       | Value                          | Description                                                                                                                                                                                                                                                         |
|----------------------|--------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| PrimaryGeographyName | India                          | This is the primary geography name. This will be marked as the primary name for the Geography and also displayed in the Manage Geographies Page.                                                                                                                    |
| CountryCode          | IN                             | This indicates the Country Code for the country for which you're importing data.                                                                                                                                                                                    |
| LevelNumber          | 2                              | The level number of the geography in the hierarchy. For example, Country is at Level 1 and State (California) is at Level 2.                                                                                                                                        |
| SourceId             | 2                              | The source ID for the geography, along with the parent source ID is used to identify the geography parent and child relationship within the source file data and the interface table data.                                                                          |
| ParentSourceId       | 1                              | The parent source ID for the geography, along with the source ID is used to identify the geography's parent and child relationship with records within the source file data. This should be null for the country record, as Country is at the top of the hierarchy. |
| IdentifierType       | Name                           | The type of the identifier. It can be either Name or Code.                                                                                                                                                                                                          |
| IdentifierSubtype    | Standard_Name or Standard_Code | <p>The IdentifierSubtype can be Standard_Name or Secondary_Name. The default value is Standard_Name.</p> <p>The valid Sub Types for Type "CODE" are FIPS_CODE, GEO_CODE, ISO_COUNTRY_CODE, PRIMARY_CITY, or UNKNOWN</p>                                             |
| IdentifierValue      | Bangalore                      | The value of the identifier.                                                                                                                                                                                                                                        |

You can create an import activity, enter the import details, and schedule the import.

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Geography** from the Object drop-down list.

**Note:** In the **Advanced Options** section, the option **Enable High-Volume Import** is selected by default. This mode is designed to import millions of records at once.

4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.

7. Review the import details on the **Review and Submit** page, and click **Submit**.

## Import Your Country Structure Data

You can use Import Management to create Country Structure records. It is recommended you use Import Management only if you're importing high-volume third-party data.

If you're importing licensed data from one of our vendors, then you can create the country structure by navigating to **Setup and Maintenance > Manage Geographies Task** page.

To import Country Structure records, perform the following tasks:

1. Map your source data to Oracle Applications Cloud object attributes.
2. Create source Comma Separated Values (CSV) file for import.
3. Create the import activity.
4. Review the import results.

### How You Map Your Source Data to Target Object Attributes

To import your Country Structure data into Oracle Applications Cloud, you need to populate a CSV file with your source data and map that source data to target object attributes in Oracle Applications Cloud.

You need to do the following before creating the CSV file for data import:

- Identify how your source data attributes map to the target object attributes in Oracle Applications Cloud.
- Identify the target object attributes that are required in the CSV file for a successful import.

### Required Attributes and Validations for Country Structure Object

To import data successfully into Oracle Applications Cloud, your CSV file must include values for the required attributes. This table lists the required attributes for importing new Country Structure records, prerequisite setup tasks for the attributes, and specific validations, if any, for Country Structure import:

| Attribute     | Description                                                                                                                                                                                                                                                                                                                        | Prerequisite Setup Task/ Import Validations                                                                                                                   | Creating a Country Structure Record |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|
| CountryCode   | The code for the country for which the country structure is applicable.                                                                                                                                                                                                                                                            | The GeographyType has to be "Country" and the LevelNumber has to be "1" for a country.<br><br>You can't pass different country codes when importing a record. | Yes                                 |
| GeographyType | Geopolitical divisions such as Country, State, City, and so on. For example, for US the different geography types would be State, County, City, and Postal Code. For India, the different geography types would be State, District, City, and Postal Code. For Mexico, it would be State, Municipality, Locality, and Postal Code. | The country has to be present.                                                                                                                                | Yes                                 |

| Attribute   | Description                                                                                                                         | Prerequisite Setup Task/ Import Validations                 | Creating a Country Structure Record |
|-------------|-------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|-------------------------------------|
| LevelNumber | You need these to create parent-child relationships between geography types for your country. The values can be 1, 2, 3, and so on. | To define a country, you must specify the LevelNumber as 1. | Yes                                 |

You can view the Country Structure object and its attributes in the Manage Import Objects page of the Import Management flow. You can find attribute information like type, length, description, and so on, on the Manage Import Objects page. You can view the list of valid values for country codes in the UI by navigating to the Manage Geographies task and searching with % as the Country Code value. For more information on Geographies, see Overview of Geographies, Geographic Entities, and Locations in the Related Topics section.

**Note:** Note the following:

- The import job will fail if you try to load any already existing country structure. Delete the existing country structure in the UI in Manage Geographies Tasks and import again.
- You can't load additional lower geography structure levels for an existing country structure while importing geography country structure. You can add additional geography levels in the UI for an existing country structure in the Manage Geographies task page.

## Create the Source CSV File

You include the data that you want to import into Oracle Applications Cloud in a source CSV file.

You can use the templates available in the Import Objects UI page to create the source CSV file. To download a template:

1. Go to **Navigator > Tools > Import Management > Import Objects**.
2. Select the **Country Structure** object in the table and click **Download**.

You can now edit the downloaded file and provide values for the required attributes.

**Note:** For help in populating the CSV file and to avoid any issues in entering values, see the topic Potential Issues When Opening CSV Files With Excel in Related Topics section.

## Create the Import Activity

After you have the CSV file ready, create an import activity to import the information. To create an import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select Country Structure from the **Object** drop-down list.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. You would see that the source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Click **Validate Data** to check the file for unmapped columns or data format issues. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit** when you're ready.



## Review the Import Results

Check if your import succeeded on the **Manage Imports** page. This page shows the status of all active, completed, and unsuccessful imports. To check the status of the import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click All Imports and search for the import activity that you created earlier.
3. Check the **Status** column for the import activity. The import is successful if the status displays as **Completed**. You can drill down on the import activity to go to the **Import Status** page which provides the status details of the import activity. Here, you can download and review the successfully imported user data records, the mapping details used for import activity, and the data file that you provided in CSV format.

### Related Topics

- [Overview of Geographies, Geographic Entities, and Locations](#)
- [How do I manage geography validation?](#)
- [Potential Issues When Opening CSV Files in Excel](#)
- [How do I import data?](#)

## Example of Importing Country Structure Data

You use the country structure of a country to define which geography types are part of the country and how the geography types are hierarchically related within the country.

For example, you can create geography types called State, City, and Postal Code. Then you can rank the State geography type as the highest level within the country, the City as the second level, and the Postal Code as the lowest level within the country structure.

To add a country structure using import management, your source file must contain information about the country to which the country structure belongs. You can view the list of valid values for country codes in the UI by navigating to the Manage Geographies task and searching with % as the Country Code value. You also need to specify the level at which the geography types need to be placed. By default, all countries are at Level 1. You create the country structure by increasing the level number as you go down the country structure. You place the geography types such as states, provinces, and so on at Level 2, districts or counties at Level 3, and so on. To add a country structure, your source file must include the values that let the import process identify the existing records.

### Sample Input CSV File

You include the data that you want to import into CX Sales and Fusion Service in a source CSV file. Here is a sample input CSV file for country as US.

| CountryCode | LevelNumber | GeographyType |
|-------------|-------------|---------------|
| US          | 1           | COUNTRY       |
| US          | 2           | STATE         |
| US          | 3           | COUNTY        |

| CountryCode | LevelNumber | GeographyType |
|-------------|-------------|---------------|
| US          | 4           | CITY          |
| US          | 5           | POSTAL CODE   |

Here is another input CSV file for importing the country structure for India.

| CountryCode | LevelNumber | GeographyType |
|-------------|-------------|---------------|
| IN          | 1           | COUNTRY       |
| IN          | 2           | STATE         |
| IN          | 3           | DISTRICT      |
| IN          | 4           | CITY          |
| IN          | 5           | POSTAL CODE   |

In case you want to import the country structure for Mexico, your input CSV file would look like this:

| CountryCode | LevelNumber | GeographyType |
|-------------|-------------|---------------|
| MX          | 1           | COUNTRY       |
| MX          | 2           | STATE         |
| MX          | 3           | MUNICIPALITY  |
| MX          | 4           | LOCALITY      |
| MX          | 5           | POSTAL CODE   |

In this example, we are importing the Country Structure for US. You must create a source file (CSV) file with the attributes as shown in this table and import it using Import Management.

| Attribute Name | Value | Description                                                             |
|----------------|-------|-------------------------------------------------------------------------|
| CountryCode    | US    | The code for the country for which the country structure is applicable. |

| Attribute Name | Value   | Description                                                                                                                                                                                                                                                                                                                        |
|----------------|---------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| LevelNumber    | 1       | The level number of the geography in the hierarchy. For example, Country is at Level 1 (Top level) and State (California) is at Level 2. You need these to create parent-child relationships between geography types for your country.                                                                                             |
| GeographyType  | COUNTRY | Geopolitical divisions such as Country, State, City, and so on. For example, for US the different geography types would be State, County, City, and Postal Code. For India, the different geography types would be State, District, City, and Postal Code. For Mexico, it would be State, Municipality, Locality, and Postal Code. |

Create an import activity to import the information. To create an import activity:

1. Go to **Navigator > Tools > Import Management > Import Queue**.
2. Click **Create Import Activity** in the **Manage Imports** page.
3. In the **Enter Import Options** page, provide a name for the import activity, and select **Country Structure** from the Object drop-down list.  
**Note:** In the **Advanced Options** section, the option **Enable High-Volume Import** is selected by default. This mode is designed to import millions of records at once.
4. Select the CSV file in the **File Name** field, and click **Next**.
5. The source and target attributes are automatically mapped in the **Map Fields** page. Review and edit the mappings if required.
6. Check the file for unmapped columns or data format issues by clicking **Validate Data**. Click **Next**.
7. Review the import details on the **Review and Submit** page, and click **Submit**.

## How You Import and Export Territory Geography Zones

Territory geography zones are geographical boundaries that you can set up to replicate your organization's regions, such as a Pacific Northwest sales region.

You can set up territory geography zones in one application instance, and then after the territory geography zones are defined you can export the territory zones and import them into another application instance.

To define your territory geography zones and then import your territory zones into another application instance, you must complete the following steps:

1. Import the master reference geography data into the application.
2. Define your territory geography zones using the Manage Territory Geographies task.
3. Export the territory geography zones.
4. Import the territory geography zones into another application instance.

### Import the Master Reference Geography Data

Firstly, you must import the master reference geography data. Master reference geography data includes geography elements, such as country, state, and city, and is required for any geographical information that you store in the

application, such as address information used in customer and sales records. For more information, see the topic Geography Hierarchy. Master reference geography data can be imported into the application using the Import Management.

## Define Your Territory Geography Zones

After the master reference geography data has been imported, you can then create your territory geography zones in the application using the Manage Territory Geographies task in Setup and Maintenance. For more information, see the Manage Territory Geographies topic in the Related Topics section.

## Export the Territory Geography Zones

After you have completed importing the master reference geography data and defining your territory geography zone tasks, you can create a configuration package to export the territory zone data. For more information, refer to the Exporting Setup Data demo listed in the related topics section.

## Import the Territory Geography Zones

After you have downloaded your configuration package for your territory geography zone setup, you can import the territory zones into another application instance.

**Note:** Ensure that you import your master reference geography data into the new application instance before you import the configuration package.

### Related Topics

- [Geography Hierarchy](#)
- [Import Your Territory Geographies Data](#)
- [Example of Importing Territory Geography Data](#)

# Set Up Geocoding

## Geocoding

This topic explains geocoding and how to enable this option in the application.

Geocoding is the process of finding latitude and longitude coordinates from geographic data such as street addresses or postal codes. Once these coordinates are available, you can use the spatial services feature to identify points of interest, such as customer and contact addresses, in the vicinity. The application integrates the Geocoding feature with eLocation ([http://elocation.oracle.com/maps\\_oracle\\_dot\\_com\\_main.html](http://elocation.oracle.com/maps_oracle_dot_com_main.html)), which is a Geocoding service provided by Oracle.

**Note:** Geocoding for Hong Kong isn't supported.

By default, the Geocoding option is turned off in the application. You can enable the Geocoding option by going to the Setup and Maintenance work area and performing the following:

- Offering: Customer Data Management
- Functional Area: Enterprise Profile
- Task: Manage Geographies

If the Geocoding feature is enabled, the feature can be scheduled to run at regular time intervals. This ensures that newly created or updated locations are picked up and geocoded whenever you create or update an address using the user interface, web services, bulk import, or using import management.

#### *Related Topics*

- [What are Spatial Services?](#)
- [Set Up Geocoding](#)

## Set Up Geocoding

This procedure lists the steps to set up geocoding in Oracle Cloud applications.

Geocoding is a process that determines the latitude and longitude coordinates for a location. By default, geocoding is turned off in the application. You can use geocoding to display customers in the vicinity of a mobile address.

### Enable Geocoding for a Country

To enable geocoding for a country, complete these steps:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Customer Data Management
  - Functional Area: Enterprise Profile
  - Task: Manage Geographies
2. On the Manage Geographies page, search for the country for which you want to enable geocoding. You can either search by the country name or country code.
3. Click **Search**. The search results for the matching country names are displayed.
4. Select the country for which you want to enable the geocoding option.
5. Select **Geocoding Defined** for the country.

### Populate Location Latitude and Longitude Information

Once geocoding is enabled, you can schedule this feature to run at regular time intervals so that newly created or updated locations are picked up and geocoded. To schedule the geocoding feature to run at regular intervals, complete these steps:

1. Navigate to **Tools > Scheduled Processes** work area.
2. On the Overview page, click **Actions > Schedule New Process**.
3. Click the Name list and search for Populate Location Latitude and Longitude Information, and then click **OK**.
4. Enter the parameters such as Start Date and End Date, and click **Submit**.

*Related Topics*

- [Geocoding](#)
- [Populate Location Latitude and Longitude Information](#)

## Use Web Services to Populate Location Attributes for the Around Me Feature

Use this procedure to populate location attributes using Web services for the Around Me feature in countries that aren't supported by the eLocation service. The Around Me feature enables you to quickly locate information about your surroundings.

This feature uses your current location to run a proximity search on objects with location information, such as contacts, opportunities, and customers.

### Create an Address with the Location Attributes Using the LocationService Web Service

Perform the following steps to create an address with location attributes, such as latitude and longitude, using the createLocation operation.

1. Extract the Web Services URL
  - a. Sign in to the **Oracle Enterprise Manager Applications Control** using the WebLogic Server credentials.
  - b. Select **Oracle Fusion Customer Relationship Management** from the navigation tree, and then select **Fusion Applications**.
  - c. From the tree, select **CrmCommonApp**, and then select **CrmCommonApp (CRMCommonServer\_1)**.
  - d. In the Web Services pane, click **Test** for the LocationServiceSoapHttpPort port.
  - e. In the Test Web Service pane, copy the URL of a WSDL that appears in the WSDL field until "?wsdl", and then paste to a notepad.
2. Derive the Payload
  - a. Launch the WSDL URL in a Web browser to open the LocationService endpoint page.
  - b. In the LocationServiceSoapHttpPort pane, select **createLocation** from the Operation list.
  - c. In the Location pane, complete the fields, as shown in the following table.

| Field       | Value             |
|-------------|-------------------|
| Country     | CN                |
| Address1    | Chaoyang District |
| City        | Shanghai          |
| Postal Code | 200233            |

| Field           | Value     |
|-----------------|-----------|
|                 |           |
| State           | China     |
| CreatedByModule | AMS       |
| Latitude        | 20.36789  |
| Longitude       | -39.34444 |

**Note:** Deselect all the other parameters in this Location pane. Also, deselect LocationProfile, OriginalSystemReference, and LocationInformation options.

- d. Click the **XML Source** option.

**Note:** This option appears next to the Operation list.

- e. Copy the XML source and paste to a notepad.

### 3. Call the Web Service

- a. Open the **Oracle Fusion Service Tester** page.
- b. In the WebService URL field, paste the WSDL URL that you derived from Step 5 of the Extracting the Web Services URL section.
- c. Enter the user name and password credentials.
- d. In the **Payload** pane, paste the XML source that you derived from Step 5 of the Deriving the Payload section.
- e. Click **Invoke**. The Output Payload pane displays the output payload.

### 4. Test the Web Service

- a. Sign in to the **Oracle Fusion Applications Home** Page.
- b. Navigate to the Customer Center work area.
- c. Search the address that you added.
- d. Click the **Addresses** section.
- e. From the **Actions** list, select the **View Geography Information** option.
- f. Verify the latitude and longitude details.

## Update the Location Attributes of an Address Using the LocationService Web Service

Perform the following steps to update the location attributes of an address, such as latitude and longitude, using the updateLocation operation.

### 1. Extract the Web Services URL

- a. Sign in to the **Oracle Enterprise Manager Applications Control** using the WebLogic Server credentials.
- b. Select **Oracle Fusion Customer Relationship Management** from the navigation tree, and then select **Oracle Fusion Applications**.

- c. From the tree, select **CrmCommonApp**, and then select `crmCommonApp` (`CRMCommonServer_1`)
- d. In the Web Services pane, click **Test** for the LocationServiceSoapHttpPort port.
- e. In the Test Web Service pane, copy the URL of a WSDL that appears in the WSDL field until "?wsdl", and then paste to a notepad.

## 2. Derive the Payload

- a. Launch the WSDL URL in a Web browser to open the LocationService endpoint page.
- b. In the LocationServiceSoapHttpPort pane, select **updateLocation** from the Operation list.
- c. In the Location pane, complete the fields, as shown in the following table.

| Field      | Value                                                                                                                         |
|------------|-------------------------------------------------------------------------------------------------------------------------------|
| LocationId | 300100078489616<br><br><b>Note:</b><br>Enter the location ID that was generated in Step 1 of the Testing the Results section. |
| Latitude   | 30.36789                                                                                                                      |
| Longitude  | -40.34444                                                                                                                     |

**Note:** Deselect all the other parameters in this Location pane. Also, deselect LocationProfile, OriginalSystemReference, and LocationInformation options.

- d. Click the **XML Source** option.

**Note:** This option appears next to the Operation list.

- e. Copy the XML source and paste to a notepad.

## 3. Call the Web Service

- a. Open the **Oracle Fusion Service Tester** page.
- b. In the WebService URL field, paste the WSDL URL that you derived from Step 5 of the Extracting the Web Services URL section.
- c. Enter the user name and password credentials.
- d. In the **Payload** pane, paste the XML source that you derived from Step 5 of the Deriving the Payload section.
- e. Click **Invoke**. The Output Payload pane displays the output payload.



#### 4. Test the Web Service

- a. Sign in to the **Oracle Fusion Applications Home** Page.
- b. Navigate to the Customer Center work area.
- c. Search the address that you updated.
- d. Click the **Addresses** section.
- e. From the **Actions** list, select the **View Geography Information** option.
- f. Verify the latitude and longitude details.

## How You Set up Address Cleansing

Address cleansing validates, corrects, and standardizes address information that you enter in the application. Address cleansing, unlike geography validation, validates both the geography attributes and the address line attributes.

To use the address cleansing functionality, you need to have license for the customer data quality application, because the feature is delivered using data quality integration.

You can specify the real-time address cleansing level for each country by choosing either of these options:

- **None:** Specifies no real time address cleansing.
- **Optional:** Provides option to cleanse addresses.

Once you have enabled address cleansing for a country, a **Verify Address** icon appears at address entry points in the application. Click the icon to perform address cleansing and receive a corrected, standardized address. If the application doesn't find a matching address, then an alert message is displayed.

## FAQs for Loqate Support

### How to Import Nokia Geography Data

We recommend that you use Loqate geography data. However, if you need to use Nokia data for one or more countries for business reasons you can do so.

By default, Import Geography Data task invokes Loqate geography data.

**Note:** Oracle doesn't support any Nokia geography data fixes.

Perform these steps to import Nokia geography data:

1. Set the profile value of the ORA\_HZ\_ENABLE\_DAAS\_LOQATE profile option to No in the Setup and Maintenance work area by going to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation

- Task: Manage Administrator Profile Values

2. Import the Nokia geography data for a country as follows:

- Navigate to the Manage Geographies task in the Setup and Maintenance work area by going to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Geographies
- On the Actions menu, Click Import Geography Data for a country.

**Note:** The Import Geography Data action is disabled for a country if the geography data for that country isn't available from Loqate or if the country data is already imported using either Loqate, Nokia, or any third party geography data.

After the geography data is loaded, the data provider name (Loqate or Nokia) is displayed in the Hierarchy Defined section in Manage Geographies.

## How many countries does Loqate support? How do I get support for any additional country?

Loqate supports 82 countries. Any additional country support beyond the 82 must be logged as an enhancement request.

To log the enhancement request, go to [Idea Lab](#).

### Related Topics

- [How to submit an enhancement request on Idea Lab](#)

## Will I be charged for Loqate data?

There's no charge or licensing requirement for Loqate geography data.

## I am an existing customer, how will I be impacted? Can I import both Loqate and Nokia geography data?

No. You can import either Loqate or Nokia geography data, but you can't import from both providers for a single country. We recommend that you use Loqate geography data because Loqate supports 82 countries including existing 62 Nokia supported countries.

If you're already using Nokia geography data, you can select one of these two options:

- Option 1: You need not do anything and continue to use Nokia geography data. Oracle doesn't support any Nokia geography data fixes.
- Option 2: You can replace Nokia geography data with Loqate geography data. This is a manual process today. You must follow manual steps and work closely with the support team to import new Loqate geography data. For more information about this process, see [Replace Existing Master Geography Data with Revised Oracle-Licensed Geography Data](#) section in this chapter.

## How frequent are updates to Oracle licensed geography reference data available?

The geography reference data is updated on a quarterly basis but the update of the latest geography reference data refresh isn't automated. You will be informed about the geography reference data refresh using release readiness documents.

## How is geography data updated? Are updates available for all countries at the same time?

When you import the geography data for a country for the first time you would get the latest Loqate geography data. But if your Loqate geography data is more than three months old, you have to uptake the latest Loqate geography data by following the steps in the [Replace Existing Master Geography Data with Revised Oracle-Licensed Geography Data](#) topic.

### *Related Topics*

- [How do I replace the existing master geography data with revised Oracle-Licensed geography data?](#)

## Can I import Vertex or other third-party geography data in Manage Geographies?

Yes, you can continue to import geography data of your choice. Oracle provides support for Loqate geography data out of the box.

## Can I import geography data for multiple countries in one import job?

No. You can submit only one import job for a country. After submitting the import job, you can search for a different country and submit another import job for that country. Currently, you can only search and import Loqate data for one country at a time using the Manage Geographies task in Setup and Maintenance menu.

## FAQs for Define Geographies

### How You Search Geographies in the Language You Prefer

You can search geographical data using the language that you prefer.

For example, when you load geography data for Canada in English and French. When you search this data using say Postal Code H4A 0A1, the following is the search result:

When you search this data using say Postal Code H4A 0A1, the following is the search result:

- H4A 0A1, Montreal, QC
- H4A 0A1, Montreal, Quebec
- H4A 0A1, Montréal, QC
- H4A 0A1, Montréal, Quebec

You may want the search results to be displayed in the language you prefer. So, if you set the language as English, the following must be displayed:

- H4A 0A1, Montreal, QC
- H4A 0A1, Montreal, Quebec

And if you set the language as French, the following must be displayed:

- H4A 0A1, Montréal, QC
- H4A 0A1, Montréal, Quebec

This can be done after setting up the profile option Filter Geographies Using User Language (HZ\_GEO\_FILTER\_BY\_USER\_LANG). You must first define the profile option HZ\_GEO\_FILTER\_BY\_USER\_LANG and specify the language you want to use.

1. Create the profile option as follows:
  - a. Click **Navigator > My Enterprise > Setup and Maintenance > Search** and search for Manage Profile Options.
  - b. Click Create new profile option icon and enter the following:
    - Profile Option Code: HZ\_GEO\_FILTER\_BY\_USER\_LANG
    - Profile Display Name: Filter Geographies Using User Language
    - Application: Trading Community Model
    - Module: Trading Community Model
    - Description: provide the description
    - Start Date: specify a date
  - c. Click Save and close.
  - d. In Profile Option Levels table, select **Enabled** and **Updateable** for the site level.

- e. Click Save and Close.
- 2. Set the default value for the profile option as follows:
  - a. Click **Navigator > My Enterprise > Setup and Maintenance > Search** and search for Manage Administrator Profile Values.
  - b. Search HZ\_GEO\_FILTER\_BY\_USER\_LANG as the profile option code.
  - c. Add new Site level profile value.
  - d. Specify the new profile in the following format:

```
<COUNTRY_CODE1>:<GEOGRAPHY_LEVEL1>,  
<GEOGRAPHY_LEVEL2>;<COUNTRY_CODE2>:<GEOGRAPHY_LEVEL1>
```

Where Geography Level values start with value 1 for country and increment for each level that's defined in the country's geography structure setup.

For example, the following are the geography levels for Canada:

Country - 1, State - 2, Province - 3, City - 4, Postal Code - 5

Similarly, the following are the geography levels for United States:

Country - 1, State - 2, County - 3, City - 4, Postal Code - 5

Example 1: If you want to filter data for Canadian Cities, then the profile value is CA:3 where CA is the country code for Canada and 3 is geography level value for City.

Example 2: If you want to filter data for both State and Cities for United States, then value should be US:2,4

Example 3: If you want to filter data for multiple countries as given in both example 1 and example 2, then use semi colon as delimiter, like CA:3;US:2,4

- e. Click Save and Close.

## Why is Import Geography Data Disabled in Manage Geographies?

Import Geography Data is disabled for a country if the geography data for that country isn't available from Loqate or if the geography structure or hierarchy is already defined for that country. The existing master geography hierarchy can be from Loqate or non-Loqate geography data providers. For example, Pakistan isn't supported currently in the supported list of 82 countries. If you try to import geography data for Pakistan after defining geography structure or geography hierarchy for it, Pakistan would be greyed out in the import list.

**Note:** If the hierarchy is defined, delete the geography hierarchy data first and then the geography structure.

## When do I define address cleansing?

When address data entered into the application must conform to a particular format, to achieve consistency in the representation of addresses. For example, making sure that the incoming data is stored following the correct postal address format.

## Why can't I update a geography structure by copying an existing country structure?

You can only update a geography structure by adding existing geography types, or by creating new geography types and then adding them to the geography structure.

You can only copy an existing country structure when you're defining a new country structure.

## How many levels in a geography structure can I define?

We recommend that you add up to six levels, starting with country at level 1, while defining geography structures. If you add more than six levels containing list of values or validations, then the sixth level and above may not work as expected in the Address UI of accounts, contacts, suppliers, persons, and so on.

## Why can't I delete a level of the country geography structure?

If a geography exists for a country geography structure level then you can't delete the level.

For example, if a state geography has been created for the United States country geography structure, then the State level can't be deleted in the country geography structure.

## What happens if I add or update the details of a country?

Any change in the country details is reflected in pages associated with geographies such as Manage Territories, addresses list of values in the Account and Contact UI, and so on. However, the list of countries in the Manage Geographies isn't updated.

## How can I add a geography that's at a lower level to any geography in a geography hierarchy?

Select the geography that you want to create a geography at lower level, and then click the **Create** icon. This lets you create a geography for a geography type that's one level lower to the geography type you selected. The structure of the country's geography types are defined in the Manage Geography Structure page.

## How can I verify whether the third-party geography structure and hierarchy I imported are available in the application?

You can track the progress of the geography structure and hierarchy import process by navigating to the Scheduled Processes page and viewing the status of the third-party geography data import process.

Once the process completes, the status changes to Succeeded. You can then verify the newly imported geography structure and hierarchy in the Setup and Maintenance work area by navigating to the following: offering: Customer Data Management; functional area: Enterprise Profile; task: Manage Geographies, where you first loaded the third-party geography data.

**Note:** Before you load geography data for a country from a third party provider, ensure that no geography structure or hierarchy is saved for that country. If geography structure or hierarchy data is already available, the load process fails.

## How can I enable geocoding?

You can enable geocoding for a country by turning the Geocoding option for that country in the Setup and Maintenance work area.

Navigate to the following:

- offering: Customer Data Management
- functional area: Enterprise Profile
- task: Manage Geographies

Search for the country for which you want to enable geocoding and click the **Geocoding Defined** icon. If geocoding is enabled for a country, the Geocoding Defined icon displays a check mark.

Once you have enabled geocoding for a country, you must run the Run Geocode Generation scheduled process on the Run Geocode Generation task. Before you run the job, however, ensure that you have specified the country code of the country for which you want to generate the geocodes.

## Where can I view the geocode values of a location?

You can search for and view the geocode values of a party's location in the Party Center and the Customer Center pages.

Navigate to the Addresses section of the party's profile and click either **View, Columns, Latitude** and **View, Columns, Longitude**, or **View, Columns, Manage Columns, Latitude** and **Longitude**. This displays the latitude and longitude, or geocode values, associated with the location of the party.

**Note:** Geocode information display is available only when geocoding is enabled for the country to which the address belongs.

### *Related Topics*

- [Geocoding](#)

## What are Spatial Services?

Spatial services allow users to find points of interest such as customers, contacts, and so on using the latitude and longitude coordinates of an address.

The Oracle Fusion Mobile Sales application provides these services for sales representatives to discover accounts and contacts around their location.

## Where can I update and view the geography name reference information for parties?

To view the geography name reference information associated with parties, you need to ensure that you have created an address for the party. You can create or update party addresses in the Organizations, Persons, and Groups work areas.

Once you have updated an address, you must either wait for the Run Geocode Generation scheduled process to run automatically as scheduled or start geocode generation manually from the Setup and Maintenance work area by navigating as follows:

- offering: Customer Data Management
- functional area: Enterprise Profile
- task: Run Geocode Generation

Once the Run Geocode Generation job has updated the geography information for the country associated with the party you updated, you can search for and view the geography name reference information associated with the party in the Organizations, Persons, and Groups work areas. Navigate to the person, organization, or group whose address



you want to verify and click **Actions, View Geography Information**. This displays a dialog box that displays the updated geography information, complete with address values enhanced using geography name reference.

**Note:** Geography name reference enriched geography information display is available only when geography validation is enabled for the country to which the address belongs.

## How can I save an address that didn't pass geography validation?

Search and select for the country name in the Manage Geographies page, and then click the **Validation Defined** option. In the Manage Geography Validation page, select **No Validation** in the Geography Validation Level for Country drop-down list. This option saves addresses that don't pass the geography validation, including incomplete and invalid addresses.



# 7 Common Components

## Overview of Setting Up Common Components

Several common components provide core functionality for the applications. Common components provide functionality that spans multiple applications, such as the accounting calendar or application messages. This chapter describes many of the common components.

Where appropriate, other common components have their own individual chapters or are described in other guides or help topics.

## Actionable Infolets

### Overview of Actionable Infolets

Actionable infolets are transactional infolets that can co-exist on the same page as business intelligence (BI) infolets. Actionable infolets give salespeople a quick overview of pending tasks in a single place.

Salespeople can quickly act from the infolets themselves, without having to navigate to different detail views. The following actionable infolets are available by default:

- My Tasks
- My Appointments
- My Accounts
- My Leads
- My Opportunities

You can also view a graphical representation of the actionable infolets. The summary charts display data based on the selected filters.

The predefined, actionable infolets let salespeople quickly navigate to relevant areas to perform quick actions on individual records. The infolets can improve sales performance by prioritizing tasks and filtering data. Filtering reduces the number of searches required to view any outstanding items that might require attention.

Salespeople can personalize actionable infolets, refresh data, and create and edit data as required. Built in configuration features help salespeople effectively plan their day, thus saving valuable time. For example, they can choose to select or hide predefined filters that they want to make available on the actionable infolets so that they see only the data they need to see at any given time.

## About the Sales Infolets Page

The Sales Infolets page displays key sales information in containers called infolets. Some infolets provide you with an overview, but others make it possible for you to take direct action.

These actionable infolets summarize key sales data and let you take immediate action on the tasks presented. The Sales Infolets page is enabled by default. Ensure that you have access to the job roles for which you're enabling the page.

To understand how to configure the springboard and home page to fit your unique business needs, see these guides on Oracle Help Center:

- [Oracle Applications Cloud Configuring Applications Using Application Composer](#)
- [Configuring and Extending Applications](#)

**Note:** Actionable infolets are secured through the "View Sales Homepage pagination dot one" and the "View Sales Representative Dashboard" privileges. Ensure users have these two privilege. For more information, see the [Securing Sales and Fusion Service and Security Reference for Sales and Fusion Service](#) guides on Oracle Help Center.

#### *Related Topics*

- [Personalize Your Key Infolets](#)
- [Overview of Sandboxes](#)
- [How do I view the privileges or policies for a job role?](#)

## Set the Actionable Infolet Personalization Enabled Profile Option

Sometimes salespeople want to modify the default settings and personalize their actionable infolets so that they can set up their own filters and modify how they want to display the details of the records.

Here's how to enable users to personalize actionable infolets:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option code name `ZBS_ENABLE_ACTIONABLE_INFOLET_PERSONALIZATION` in the **Profile Option Code** field.
3. Click **Search**.
4. In the list that's returned, click on the profile option code link.
5. Set the profile option value to Yes.
6. Click **Save and Close**.

#### *Related Topics*

- [Modify Actionable Infolets](#)
- [Personalize Your Key Infolets](#)

## Modify Actionable Infolets

As an administrator, you can choose to modify or remove existing predefined fields (attributes) or select additional user-defined attributes to display on actionable infolets for salespeople. You can apply different setting for salespeople by role or at the site level.

If you want to modify the My Tasks and My Appointments actionable infolets, then the Date, Time, and Subject attributes must be noneditable. This means that the drill-down option isn't available on these fields.

Salespeople can improve their sales performance tasks by prioritizing tasks and using filters. Record-count filters selected by salespeople take precedence over the record count setting that you specify. For example, if you set 10 as the record count for the My Tasks actionable infolet, and if the salesperson selects the Overdue Tasks filter, then 10 records, if applicable, are displayed.

Salespeople can also view a graphical representation of the actionable infolets. The summary charts display data based on the selected filters.

### Before You Modify the Infolets

Before modifying the predefined actionable infolets, do the following:

- Understand the typical workflows for working with runtime application changes.
- Ensure that you can modify the infolet by checking if the Edit Pages menu item is available in the Settings and Actions menu available from the global header region. Click your user image or name in the global header to open the Settings and Actions menu. If the menu item isn't available, then you can't modify the page.

**Note:** Actionable infolets are secured through the "View Sales Homepage pagination dot one" and the "View Sales Representative Dashboard" privileges. Ensure users have these two privilege. For more information, see the Securing Sales and Fusion Service and Security Reference for Sales and Fusion Service guides on Oracle Help Center.

- Confirm that your privilege is sufficient for modifying the page.
- Create or activate an existing sandbox.

When configuring actionable infolets, make sure the sandbox has only the Page Composer tool selected. If you want to make changes in a context layer other than the default Site layer, you must create a separate sandbox and use only Page Composer in it. You can then change the context layer from Site to other layers. For example, to create or edit infolets for a user with a specific job role, you must select the Job Role context layer.

**CAUTION:** If you delete an infolet, you can't easily retrieve it. Contact your help desk if you accidentally delete one.

### Edit Actionable Infolet Visibility

Actionable infolets are available to predefined roles. However, you can set the availability of actionable infolets so that they become visible to other user-defined roles by editing the visibility settings for the infolet:

1. Navigate to the actionable infolets page.
2. Click your user image or name in the global header region to open the **Settings and Actions** menu, and select **Edit Pages**.

3. Click the infolet repository (gears) icon and select the check box next to the actionable infolet you want to make available.
4. Click the **Actions** icon on the top right corner of the infolet, and select **Edit Visibility**.
5. Select one of the following:
  - o **Yes:** The actionable infolet is available for selection in the infolet repository.
  - o **No:** The actionable infolet isn't available for selection in the infolet repository.
  - o **EL expression:** The evaluation of the EL expression decides whether the actionable infolet is available from the infolet repository. The predefined expression is  
`#{{securityContext.userInRole['ORA_ZBS_SALES_REPRESENTATIVE_JOB,ORA_ZBS_SALES_MANAGER_JOB,ORA_ZBS_SALES_VP_`
6. Edit the EL expression to suit your requirements.
7. Click **Save and Close** when you have finished making the changes.
8. Verify your changes and publish the sandbox.

## Modify Actionable Infolet Attributes

You can select and replace any of the predefined attributes that are displayed on the actionable infolets with alternate available attributes of your choice.

**Note:** If you want to hide one of the predefined attributes, enter a blank value, in which case nothing is displayed in the corresponding drop-down list position you select.

This table shows the attributes that you can modify and represents the order as they appear on the UI.

| Actionable Infolet | Attributes                                                                                                 |
|--------------------|------------------------------------------------------------------------------------------------------------|
| My Tasks           | <ul style="list-style-type: none"><li>Subject</li><li>Activity Type</li><li>Due Date</li></ul>             |
| My Appointments    | <ul style="list-style-type: none"><li>Activity Time</li><li>Subject</li><li>Primary Address</li></ul>      |
| My Accounts        | <ul style="list-style-type: none"><li>Name</li><li>Primary Contact</li><li>Primary Address</li></ul>       |
| My Opportunities   | <ul style="list-style-type: none"><li>Sales Stage</li><li>Name</li><li>Close Date</li><li>Amount</li></ul> |
| My Leads           | <ul style="list-style-type: none"><li>Rank</li><li>Lead Name</li></ul>                                     |

Here's how to modify the attributes of an actionable infolet:

1. Ensure that you're working in an active sandbox.
2. Navigate to the actionable infolet that you want to modify.
3. Click your user image or name in the global header region to open the **Settings and Actions** menu, and select **Edit Pages**.  
The Edit Pages window appears.
4. Select one of the following:
  - **Site** to make your changes available to everyone.
  - **Job Role** to target a specific job role you select from the list.
5. From the actionable infolet that you want to modify, for example, My Opportunities, select **Configure** from the **Actions** menu.  
The My Opportunities actionable infolet screen is displayed with the predefined fields selected.
6. From the **Layout** tab, select the attributes that you want to edit from the respective drop-down lists.
7. Set and adjust the two-column table widths in percentage terms by sliding your mouse along the Column Width ruler.
8. Make the changes that you want to the attribute and select another attribute to edit, if required.
9. In the **Drill Down Field**, select the item that you want to use for drilling down to the detail page of the opportunity object.  
**Tip:** If dynamic choice list fields are added to actionable infolets, then the drill-down capability is automatically enabled.

This table shows the field names and associated attribute names that you can select for drill-down for each of the actionable infolets:

| Actionable Infolet | Drill Down Field | Attribute               |
|--------------------|------------------|-------------------------|
| My Opportunities   | Name             | Amount                  |
|                    |                  | Close Date              |
|                    |                  | Sales Stage             |
| My Leads           | Lead Name        | Rank                    |
| My Accounts        | Name             | Primary Contact         |
|                    |                  | Primary Address         |
| My Appointments    | Subject          | Primary Contact Address |
| My Tasks           | Subject          | Type                    |
|                    | Primary Contact  | Due Date                |

| Actionable Infolet | Drill Down Field | Attribute |
|--------------------|------------------|-----------|
|                    |                  |           |

10. Click **Save and Close** when you have finished making the changes.
11. Verify your changes and publish the sandbox.

## Modify Record Counts

You can also change the predefined number of records to display on the infolet. By default, 10 records display. You can change the default to 10, 20, 25, or 30, as required.

Here's how to modify record counts for an actionable infolet:

1. Ensure that you're working in an active sandbox.
2. From the actionable infolet that you want to modify, for example, My Opportunities, select **Configure** from the **Actions** menu.  
The My Opportunities actionable infolet screen is displayed.
3. From the **Record Count** tab, select the number of records that you want to display on the infolet from the drop-down list.
4. Click **Save and Close**.
5. Verify your changes and publish the sandbox.

## Modify Filters

Filtering reduces the number of searches required to view any outstanding items that might require attention. For example, you can choose to select or hide predefined filters that you want to make available on the actionable infolets.

You can show or hide filters, rearrange filters, and add custom filters. You can multiselect and double-click filters in the Available list to move them to the Selected list. You must select at least one filter for the actionable infolet filter list.

You can include saved searches created in Workspace as filters to quickly access relevant records by selecting the **Include Workspace Saved Searches** check box. It's deselected by default but when selected, all the Workspace saved searches associated with the specified object appear as filters for your actionable infolet. For more information, see the related topic Switch Actionable Infolets to Use Workspace Saved Searches as Filters available from the Getting Started with Your Sales Implementation on Oracle Help Center.

To access a different set of data, create a new saved search in Workspace and then expose the relevant saved search in the Actionable Infolets UI. Selecting available Workspace saved-search filters allows for a more dynamic, effective, and targeted view of the records that salespeople want to update and take immediate action on.

**Note:** Predefined saved searches are available for selection. However, any custom saved searches that you create must include **Record Set** values selected for either any records that you own or for records where you're on the team. In addition, when saving your saved search, you must select the **Run Automatically** check box to run the search automatically when your saved search is loaded. Otherwise, the custom saved search won't display in the available filters list in the Configure UI for your actionable infolet.

This table shows the filters that you can modify.

| Actionable Infolet | Filter                                                          | Filter Description                                                                         |
|--------------------|-----------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| My Tasks           | <ul style="list-style-type: none"><li>• Today's Tasks</li></ul> | <ul style="list-style-type: none"><li>• Display all my tasks scheduled for today</li></ul> |



| Actionable Infolet | Filter                                                                                                                                                                                                                                             | Filter Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                    | <ul style="list-style-type: none"> <li>Tomorrow's Tasks</li> <li>Overdue Tasks</li> <li>Beyond Tomorrow's Tasks</li> <li>All Tasks</li> <li>Open Tasks</li> <li>High Priority Open Tasks</li> </ul>                                                | <ul style="list-style-type: none"> <li>Display all my tasks scheduled for tomorrow</li> <li>Display all my tasks that are now overdue</li> <li>Display all my tasks that are scheduled for the day after next and beyond</li> <li>Display all my assigned tasks</li> <li>Display all my assigned tasks that are currently open</li> <li>Display all my high priority tasks that are currently open</li> </ul>                                                                                        |
| My Appointments    | <ul style="list-style-type: none"> <li>Today's Appointments</li> <li>Tomorrow's Appointments</li> </ul>                                                                                                                                            | <ul style="list-style-type: none"> <li>Display all my appointments scheduled for today</li> <li>Display all my appointments scheduled for tomorrow</li> </ul>                                                                                                                                                                                                                                                                                                                                        |
| My Accounts        | <ul style="list-style-type: none"> <li>My Accounts</li> <li>My Favorite Accounts</li> <li>My Team Accounts</li> </ul>                                                                                                                              | <ul style="list-style-type: none"> <li>Display only the accounts that I own</li> <li>Display my accounts that I've marked as favorites</li> <li>Display all the accounts that I can view</li> </ul>                                                                                                                                                                                                                                                                                                  |
| My Opportunities   | <ul style="list-style-type: none"> <li>Closing in Next 7 Days</li> <li>Closing This Month</li> <li>Closing This Quarter</li> <li>Closing Next Quarter</li> <li>Open opportunities where I am on the team</li> <li>My Open Opportunities</li> </ul> | <ul style="list-style-type: none"> <li>Display my open opportunities that are due to close in the next 7 days</li> <li>Display my open opportunities that are due to close this month</li> <li>Display my open opportunities that are due to close within the current quarter</li> <li>Display my open opportunities that are due to close within the next quarter</li> <li>Display my open opportunities where I'm on the team</li> <li>Display only those open opportunities that I own</li> </ul> |
| My Leads           | <ul style="list-style-type: none"> <li>Unaccepted Leads</li> <li>My Open Leads</li> <li>Recent Open Leads</li> <li>Open Leads where I am on the team</li> </ul>                                                                                    | <ul style="list-style-type: none"> <li>Display a list of all unaccepted leads that are assigned to me</li> <li>Display only those open leads that I own</li> <li>Display a list of my leads that have recently been opened</li> <li>Display a list of open leads where I'm on the team</li> </ul>                                                                                                                                                                                                    |

Here's how to modify the filters of an actionable infolet:

1. Ensure that you're working in an active sandbox.
2. Navigate to the actionable infolet that you want to modify.

3. From the actionable infolet that you want to modify, for example, My Opportunities, select **Configure** from the **Actions** menu.

The My Opportunities actionable infolet screen is displayed with the predefined fields selected.

4. From the **Filters** tab, select the filters that you want to modify.
5. Click **Save and Close** when you have finished making the changes.
6. Verify your changes and publish the sandbox.

## Modify Quick Actions

You can navigate to the relevant areas in your sales process where you can perform quick actions at the record level. For example, you can easily complete or defer tasks without having to drill down to view the record, or you can accept or reject new leads at the click of a button.

You can show or hide actions, rearrange actions, and add custom quick actions. You can multiselect and double-click any quick actions in the Available list to move them to the Selected list. However, you must select at least one action for the actionable infolet quick actions list.

This table shows the quick actions that you can modify and represents the order as they appear on the UI.

| Actionable Infolet | Quick Actions                                                                                                                                                                                                                                          |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| My Tasks           | <ul style="list-style-type: none"><li>• Mark as Complete</li><li>• Defer by 1 Day</li><li>• Defer by 2 Days</li><li>• Defer by 1 Week</li><li>• Create Note</li></ul>                                                                                  |
| My Appointments    | <ul style="list-style-type: none"><li>• Create Note</li><li>• Create Call Report</li></ul>                                                                                                                                                             |
| My Accounts        | <ul style="list-style-type: none"><li>• Create Lead</li><li>• Create Opportunity</li><li>• Create Appointment</li><li>• Create Task</li><li>• Create Note</li><li>• Create Call Report</li><li>• Log a Call</li><li>• Create Service Request</li></ul> |
| My Opportunities   | <ul style="list-style-type: none"><li>• Create Task</li><li>• Create Appointment</li><li>• Create Note</li></ul>                                                                                                                                       |
| My Leads           | <ul style="list-style-type: none"><li>• Accept</li><li>• Reject</li></ul>                                                                                                                                                                              |

Here's how to modify the quick actions of an actionable infolet:

1. Ensure that you're working in an active sandbox.
2. Navigate to the actionable infolet that you want to modify and make sure that the infolet displays in expanded view.
3. From the actionable infolet that you want to modify, for example, My Opportunities, select **Configure** from the **Actions** menu.

The My Opportunities actionable infolet screen is displayed with the predefined fields selected.

4. From the **Quick Actions** tab, select the quick actions that you want to modify.
5. Click **Save and Close** when you have finished making the changes.
6. Verify your changes and publish the sandbox.

#### *Related Topics*

- [Personalize Your Key Infolets](#)
- [Quick Way to Get Key Sales Information and Take Action](#)

## Example of Creating Actionable Infolet Custom Actions

You can create custom smart action for actionable infolets to update sales information but the actions can't open pages or navigate to them.

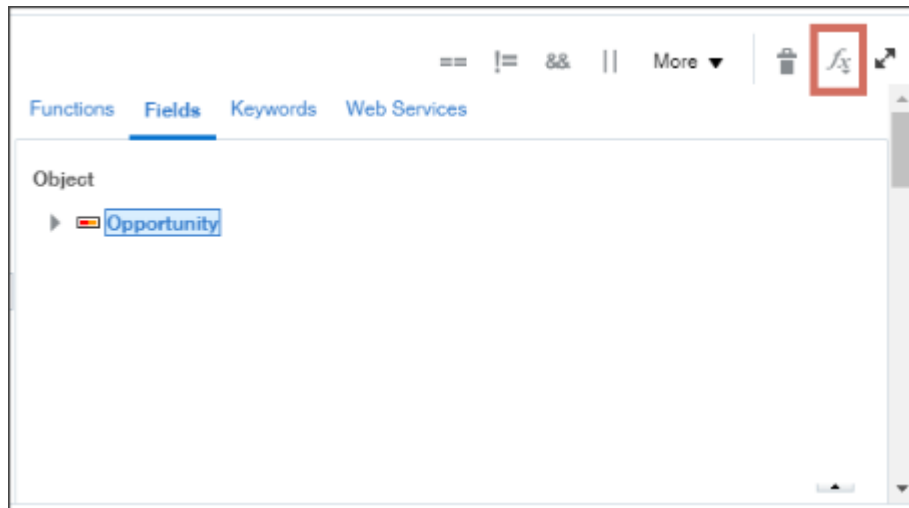
For example, you can create a smart action to update the stage of an opportunity or postpone the opportunity close date by one day, but you can't have the action open the edit opportunity page.

Here's how to create a custom smart action to postpone an opportunity close date by one day for My Opportunities actionable infolet.

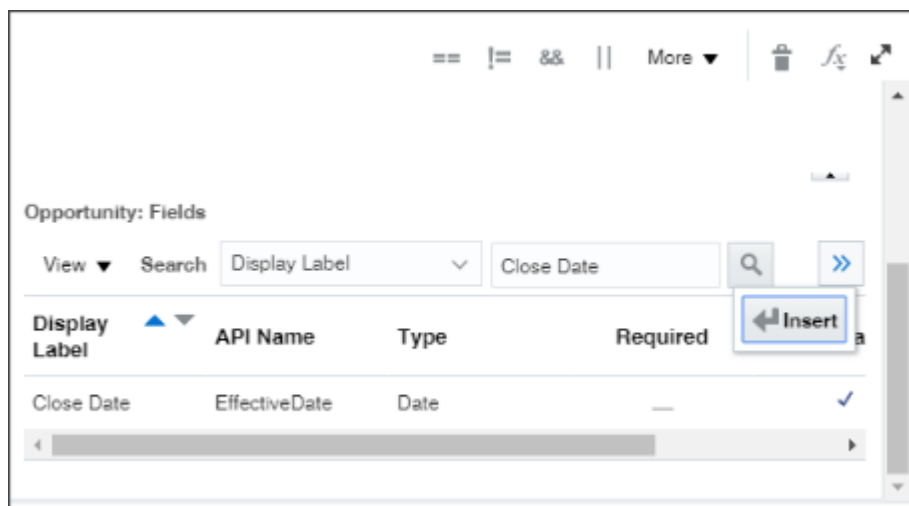
**Note:** While you can create the action directly, this example has you create a server script first. That's because the server script includes the Expression Palette to help you write and validate your EL Expression script.

1. Create and enter a sandbox with Application Composer and Page Composer as your tools.

2. Create the Groovy script as an object function server script in Application Composer:
  - a. In Application Composer, open the object node in the left portion of the page, **Standard Objects** > **Opportunity** in this example.
  - b. Click **Server Scripts**.
  - c. In the Server Scripts page, click **Object Functions**.
  - d. Enter a function name, no spaces permitted. For example: `Defer_1_Day`.
  - e. Enter the EL Expression script in the Edit Script box. You can use the Expression Palette to find the technical names of fields and insert elements of your script. Here's how to find the technical name for the opportunity **Close Date** field:
    - i. Click **Show/Hide Expression Palette** (the function icon highlighted in the screenshot).



- ii. Click **Fields**.
- iii. Select the object, **Opportunity** in this example, and scroll down.



- iv. In Opportunity: Fields section, search for the technical field name by the display label: Close Date. The technical name displays in the API Name column.
- v. You can insert the technical name into your script by clicking **Edit Script** > **Insert**.

To learn more about how to best use the features available in the expression builder when writing scripts, see "Groovy Tips and Techniques" in the Groovy Scripting Reference guide.

3. When your script is complete, click **Validate**.

Here's an example of the script to postpone the due date by one day:

```
setAttribute("EffectiveDate",EffectiveDate + 1);
```

4. When your script validates without errors, click **Save and Close**.
5. In the object list in the left side of the Application Composer page, click **Actions and Links**.
6. In the **Opportunity: Actions and Links** page, click **Create**.
7. In the Create Action or Link page, **Display Label** field, enter the action name that users see in the infolet actions list.
8. Select the **After the Script: Save the record and return to the previous page** option.
9. In the Script section, click **Method Name** and select the script name from the list.
10. Click **Save**.
11. While still in the sandbox, click **Home** to get back to the Welcome page.
12. From the sandbox **Tools** menu, select **Page Composer**. The Page Composer toolbar displays underneath the sandbox toolbar.
13. Scroll down to the My Opportunities infolet.
14. Make sure you're in the Expanded View. This is the view of the infolet showing the different filters.
15. Click **Actions** (the triangular icon at the top right corner of the infolet) and select **Configure**.
16. Move the action you created, **Defer 1 Day**, to the **Selected** column.
17. Click **Save and Close**.
18. In the Page Composer toolbar, click **Close** to save your work.

The Page Composer toolbar disappears.

19. To see the new action you created, the infolet must display at least one opportunity. A setup user generally can't access opportunities, so you must publish the sandbox without testing. From the sandbox **Action** menu, select **Publish**.
20. After publishing is complete, sign out and sign in again as a salesperson or another user who owns an opportunity.
21. With at least one opportunity displayed in the My Opportunities infolet, you can view the new action in the list.

## Why are some fields missing when I include saved searches as my filter?

You must enable any missing fields in the saved searches to use those fields as filters in your actionable infolets.

Occasionally, some fields are exposed on an actionable infolet but if you select the **Include Workspace Saved Searches** as your filter, the same fields may not be available in the applicable Workspace saved searches. For example, you can edit the Workspace **My Appointments** filter to enable fields that are exposed in the **Layout** tab of the actionable infolet. See the topic, [Make a Field Searchable in the UI](#), in this guide, for more information.

# Application Toolkit

## Overview of Oracle Application Toolkit

Oracle Application Toolkit is a foundation application that provides some features, including including the Oracle Business Intelligence Reports and Analytics pane and the Watchlist in the global header.

In the Setup and Maintenance work area, you access the Define Application Toolkit Configuration task list to set up these components.

### *Related Topics*

- [Overview of Common Implementation](#)

# Attachments

## Attachments

You can use attachments to provide supplementary information to specific business objects. Attachments can be URLs, desktop files, text, or repository folders.

For a business object you may view, create, delete, or edit attachments, depending on your role and granted privileges.

## Repository

Attachments are stored in a content management repository provided by Oracle WebCenter Content Server. Users managing attachments can't interact with the repository unless the repository mode is enabled. When enabled, users can share attachments among objects, update attachments, and perform other tasks. Access to the attachment files is controlled by a digital signing mechanism.

All attachments are scanned for viruses before they're stored on the content management repository. If a virus is detected at the time of upload, the attachment request fails and the user is notified about it.

## Security

Data security applicable to a specific business object also applies to its attachments. For example, if a user has no access to a specific expense report, then that user can't access its attachments. You can also use attachment categories to control access and actions on attachments, based on roles associated with that category.

### *Related Topics*

- [Attachment Entities](#)
- [What's an attachment category?](#)

## What's the size limit for attachment files in the sales application?

Users can attach files, such as PDFs and Word docs, to both standard and custom objects. By default, the file size limit for an individual, attached file is 2 G. You can decrease this limit, but you can't increase it.

There are no limits placed on the number of files. The size of the files is controlled centrally by the File Upload Maximum Size (FND\_FILE\_UPLOAD\_MAX\_SIZE) profile option.

Also note:

- The only limit on the total file size that can be uploaded is the amount of available space that you have purchased for the content server.
- There are no restrictions on the types of files you can attach.

## Attachments Troubleshooting

Attachments UIs are very user-friendly and easy to work with. You may encounter issues in certain cases such as you modify the attachments, for example create additional attachment categories, or implement data security on them.

### Issue: Can't View, Add, Update, or Delete Attachments

You may encounter the following issues when trying to view attachments or perform actions such as adding attachments.

- You can no longer see specific attachments that were earlier visible.
- You can no longer update or delete attachments.
- You get an error stating that you don't have permission to add attachments.

### Resolution

Use the Manage Attachment Entities page to ensure that attachment categories are associated to the relevant attachment entity. You might need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or what categories to assign.

If data security is implemented on the categories for the attachment entity, verify that the Enable Security check box is selected in the Manage Attachment Entities page for that entity. Also, make sure that users have a role that has the necessary privileges. The following table lists the privileges required to view, add, update, or delete attachments with a specific attachment category.

| Action        | Privilege                                                              |
|---------------|------------------------------------------------------------------------|
| View          | Read Application Attachment (FND_READ_APPLICATION_ATTACHMENT_DATA)     |
| Add or Update | Update Application Attachment (FND_UPDATE_APPLICATION_ATTACHMENT_DATA) |
| Delete        | Delete Application Attachment (FND_DELETE_APPLICATION_ATTACHMENT_DATA) |

For example, if users have the Read Application Attachment privilege for all categories associated with the expense report attachment entity, except the Receipts attachment category, then they can view all expense report attachments except those created with the Receipts category. Likewise, if users don't have the Update Application Attachment privilege for any attachment categories tied to the expense report attachment entity, then they can't create any attachments for the expense reports.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

## Issue: Missing Attachment Category

You can view existing attachments but the attachments no longer have an attachment category associated with them.

## Resolution

When the attachment was added, at least one category existed for the corresponding attachment entity. Since then, the entity was edited so that it no longer has any assigned categories, so the user can't see the category associated with that attachment.

Use the Manage Attachment Entities page to reassign attachment categories to the relevant attachment entity. For example, if users can no longer see the Receipts attachment category for an attachment to an expense report, then search for the expense report attachment entity and assign to it the Receipts category. You may need to check with your system administrator or help desk to determine the exact entity used on the page with the expenses attachments or any additional categories to assign.

Certain attachments UI have predefined restrictions for users on categories. Your developers can also introduce additional filters to determine which document categories are available for a specific page. Check with your developers or help desk.

### *Related Topics*

- [Attachment Entities](#)
- [How Attachment Entities and Attachment Categories Work Together](#)
- [What's an attachment category?](#)

# Calendar

## Create the Accounting Calendar

You usually create a single accounting calendar as part of your implementation. The accounting calendar defines the time periods used in the applications. When you create the calendar, you specify the exact dates for each period.

These defined periods, often called enterprise periods, are used for many purposes in the applications. 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

**Note:** If you used the Sales Assistant topics in the *Implementing Sales* guide to create your accounting calendar, then you don't need to do the steps listed here. For more information, see *What Setup Assistant Completes for You*.

Here are the high-level steps:

1. Plan your calendar periods and start year. See the Implementation Considerations section in this topic for more information.
2. Create the first-year calendar periods and generate the periods for each additional year. See the Create the Calendar section in this topic for more information.
3. Set the accounting calendar profile option. See the Set the Calendar Profile Option section in this topic for more information.
4. Run a scheduled process. See the Run the Time Dimension Process section in this topic for more information.

**CAUTION:** After your calendar is being used in transaction, you can't change the calendar options. For example, after you have generated forecasts, you can't change the calendar options.

## Implementation Considerations

Since you can't change the calendar after it's in use, ahead of time, you need to:

- Plan which periods your calendar will use.
- Decide which year you want the calendar to start. consider setting the date to the first date that your company was created. Then you can upload historical data later, if necessary.

Period frequency is an important decision for your calendar, because the period frequency set in your fiscal calendar is the shortest period you can use. Here are some examples:

- Let's say 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.
- Say you want to set the period frequency to weekly. In this case, then you can perform activities and reports by week, quarter, and year, but not by month because the number of weeks per month varies.

## Create the Calendar

When you create the accounting calendar, you're establishing the exact start and end dates for each period, for each year. Here's a procedure that uses the fictitious Vision Corporation to guide you through the steps:

1. In Setup and Maintenance, go to the following:
  - Offering: Sales
  - Functional Area: Company Profile
  - Task: Manage Accounting Calendars
2. On the Manage Accounting Calendars page, click **Create**.
3. In the Create Accounting Calendar: Calendar Options page:
  - a. Name your calendar, for example, **Sales Calendar**.
  - b. Leave the **Adjusting Period Frequency** set to None.

- c. For **Start Date**, Vision Corporation uses 1/1/10.
  - d. For **Period Frequency**, select the shortest time period you want to use for reports and activities. Vision Corporation is using **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.
  - e. Vision Corporation selects **None** for the **Separator**.
  - f. Select the **Format** to use for period names.
4. Click **Next**. The Create Accounting Calendar: Period Details page appears, showing the generated periods. The image shows multiple columns, including:
- o Period name, which is month name, one for each month of the year
  - o Year, which is 2010
  - o Period number, one for each month
  - o Quarter number for each period, assuming four quarters in the year
  - o Start and end dates for the periods
  - o A check box used to indicate whether a period is an adjusting period

Here's an example of the Create Accounting Calendar: Period Details page:

**Create Accounting Calendar : Period Details**

Back Save Save and Close Cancel

Name: Forecasts

Adjusting Period Frequency: None

Description:

Start Date: 1/1/10

Period Frequency: Monthly

**Period Details**

| Period Name | Year | Period Number | Quarter Number | Start Date | End Date | Adjusting Period         |
|-------------|------|---------------|----------------|------------|----------|--------------------------|
| Jan 10      | 2010 | 1             | 1              | 1/1/10     | 1/31/10  | <input type="checkbox"/> |
| Feb 10      | 2010 | 2             | 1              | 2/1/10     | 2/28/10  | <input type="checkbox"/> |
| Mar 10      | 2010 | 3             | 1              | 3/1/10     | 3/31/10  | <input type="checkbox"/> |
| Apr 10      | 2010 | 4             | 2              | 4/1/10     | 4/30/10  | <input type="checkbox"/> |
| May 10      | 2010 | 5             | 2              | 5/1/10     | 5/31/10  | <input type="checkbox"/> |
| Jun 10      | 2010 | 6             | 2              | 6/1/10     | 6/30/10  | <input type="checkbox"/> |
| Jul 10      | 2010 | 7             | 3              | 7/1/10     | 7/31/10  | <input type="checkbox"/> |
| Aug 10      | 2010 | 8             | 3              | 8/1/10     | 8/31/10  | <input type="checkbox"/> |
| Sep 10      | 2010 | 9             | 3              | 9/1/10     | 9/30/10  | <input type="checkbox"/> |
| Oct 10      | 2010 | 10            | 4              | 10/1/10    | 10/31/10 | <input type="checkbox"/> |
| Nov 10      | 2010 | 11            | 4              | 11/1/10    | 11/30/10 | <input type="checkbox"/> |
| Dec 10      | 2010 | 12            | 4              | 12/1/10    | 12/31/10 | <input type="checkbox"/> |

5. If you need to, manually change the details for each period.
6. Click **Save and Close**.
7. Now you need to generate the periods for each additional year, including the current, or coming year. Open the calendar.
8. Click **Add Year**.
9. Click **Save and Close**.
10. Repeat the last three steps for each year you want to add.
11. Click **Done**.

**Note:** You can't change your calendar options after you start using the calendar, such as by generating forecasts.

## Set the Calendar Profile Option

After you finish creating your calendar, set the accounting calendar profile option. This profile option setting tells the applications which calendar to use. Use these steps:

1. In Setup and Maintenance, go to the following:
  - o Offering: Sales
  - o Functional Area: Company Profile
  - o Task: Manage Calendar Profile Option
  - o Option: Manage Calendar Profile Option
2. Select the **Accounting Calendar Default** profile option.
3. In the Profile Values table, click **New**.
4. For **Profile Value**, select **Site**.
5. Click the **Profile Value** list, and select the name of the calendar you created.
6. Click **Save and Close**.

## Run the Time Dimension Process

You need to run the Refresh Denormalized Time Dimension Table for BI process to make calendar time periods available for analytics and reports. Use these steps:

1. Click **Navigator > Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog box, click the menu next to the **Name** field and click **Search**.
4. In the Search dialog box, enter **%Refresh%**, and click **Search**.
5. Select the **Refresh Denormalized Time Dimension Table for BI** process in the results that are returned and click **OK**.
6. Click **Ok** again, if needed.
7. In the Process Details window, click **Submit**.

### Related Topics

- [Accounting Calendar Options](#)

## Click to Edit

### About Click to Edit

The click-to-edit feature lets salespeople edit records directly from landing pages of work areas. By simplifying data entry, the click-to-edit feature improves usability and efficiency when working with business transactions.

Salespeople can change attributes for records directly in the landing pages without navigating to the edit pages. This feature is enabled through the Click-to-Edit on Landing Page Enabled (ZBS\_ENABLE\_CLICK\_TO\_EDIT) profile option.

This profile option isn't enabled by default. Administrators must set the profile option to enable the click-to-edit feature on the landing pages for the following sales objects:

- Accounts
- Contacts
- Opportunities
- Leads
- Activities
- Assets
- Territories

The click-to-edit feature is also available for company-defined objects.

#### *Related Topics*

- [Enable Click to Edit](#)

## Enable Click to Edit

Administrators enable the click-to-edit feature by setting the Click-to-Edit on Landing Page Enabled (ZBS\_ENABLE\_CLICK\_TO\_EDIT) profile option. This profile option isn't enabled by default.

The click-to-edit feature is available from the Accounts, Contacts, Opportunities, Leads, Activities, and Assets landing pages. The feature is also supported for custom objects.

Use the following procedure to enable click-to-edit functionality on the landing pages of supported sales objects:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option code name ZBS\_ENABLE\_CLICK\_TO\_EDIT in the **Profile Option Code** field.
3. Click **Search**.
4. In the list that's returned, click on the profile option code link.
5. Set the profile option value as needed.
6. Click **Save and Close**.

#### *Related Topics*

- [About Click to Edit](#)

## Favorites

### How Users Mark Favorite Records

Salespeople can mark records as favorites so that they can find them more easily. To mark a favorite record, salespeople:

- Click the favorite icon in the edit page of a record.
- In Workspace, click the favorite icon for the record in the list page of an object.

**Note:** You must enable the favorites functionality in Workspace. See the related topic, [Enable the Favorite Field for Quick Access to Records](#).

To view a list of all their favorites, salespeople can click the Favorites and Recent Items icon in the global header.

Currently, salespeople can mark favorites for:

- Accounts and contacts
- Assets
- Activities
- Campaigns
- Deal registrations
- Leads
- Opportunities
- Partners and partner contacts
- Territories
- Custom objects

Favorites are also available in CX Sales Mobile and in Sales for Microsoft 365.

#### *Related Topics*

- [Enable the Favorite Field for Quick Access to Records](#)
- [Mark Favorite Records](#)

## Languages

### Language Packs on Your Application

A language pack contains artifacts that are translated to a specific language. Translated artifacts include UI text, predefined data, messages, BI catalog data, and so on.

Here are the supported languages other than American English:

- Arabic
- Chinese (Simplified)
- Chinese (Traditional)
- Croatian
- Czech
- Danish
- Dutch
- Finnish
- French (Canadian)
- French (European)
- German
- Greek
- Hebrew
- Hungarian
- Italian
- Japanese
- Korean
- Norwegian
- Portuguese (Brazilian)
- Polish
- Romanian
- Russian
- Slovak
- Spanish
- Swedish
- Thai
- Turkish
- Ukrainian
- Vietnamese

## How to Install Language Packs

To install language packs on all your environments, contact your help desk. For more information about language packs, see Oracle Applications Cloud Service Definition - Language Packs (2073202.1) on My Oracle Support at <https://support.oracle.com>. There's no limit to the number of language packs you can ask for in one service request. But you must only install the language packs you need to conduct your day-to-day business because of these reasons:

- Once you request a language pack, the installation will be scheduled for all your environments, including production, staging, and test environments, so that they're all in sync.

- It takes time and resources to install language packs. So you might get extended outages during updates, especially if you have four or more language packs installed in your environments.
- Once you install any language, you can't uninstall it later.

You can view all available languages, whether they're already installed or available for installation and translation. In the Setup and Maintenance work area, use the **Manage Languages** task in the Application Extensions functional area. Each dialect is treated as a separate language. Generally, you don't need to edit any of the fields on the Manage Languages page, unless absolutely necessary.

#### Related Topics

- [How do I update existing setup data?](#)

## How to Set the Preferred Language

Here's how to set the preferred language in the sales applications:

1. Navigate to the Manage Administrator Profile Values task in Setup and Maintenance.
2. Search for the Profile Option Code `FND_LANGUAGE`.
3. Modify the profile value at the site or user level to the preferred language.
4. Save your changes.

**Note:** Keep in mind that user preferences set in the Preferences screens (located under the user name in the global header) override any site-level setting.

## Lightbox Content Library

### Considerations When Setting Up Sales Lightbox

Sales Lightbox is a content library that you can use to store, access, and share files, such as slide decks, web-based content, images, and .pdfs. Lightbox lets users store, access, and share content with individuals, accounts, and opportunities.

You can find more information about Lightbox end user tasks and capabilities in the [Using Sales](#) guide.

### Supported File Types

Sales Lightbox supports the following file types:

- Microsoft Powerpoint (.pptx): If you install the Microsoft Office Compatibility Pack, and save a presentation in the Open XML format (.pptx 2007), then those presentations are fully compatible with Sales Lightbox.
- Portable Document Format (.pdf): Standard .pdf files are supported.
- HTML: HTML in the form of microsites: See the topic, Use Microsites in the Lightbox Content Library, for more information.
- .jpg and .png: Image files in the .jpg and .png formats are supported.

For information about the actions that can be performed on different content types, see the topic, [Available Actions for Different Content Types](#).

## Upload File Size

The maximum file size for a presentation to be uploaded is 100 MB.

## Salespeople Access

Salespeople can access Sales Lightbox without any setups required. All of the default sales user roles (for example, Sales Representative, Sales Manager, and Sales VP) can access the feature using the **Sales > Lightbox** menu. In addition, the Sales Administrator user has all of the same permissions that sales users do. For additional details on sales user tasks for Sales Lightbox, see the [Using Sales](#) guide.

## Lightbox Administrator Access

In addition to the sales user permissions, the supplied Application Implementation Consultant (a type of setup user) and Customer Relationship Management Application Administrator job roles have additional privileges to:

- Access the **All Content** view: This view lets the administrator see all content in the application, not just his own. Sales users can't see this view.
- Delete content: Only the administrator can delete content not owned by him.

### Related Topics

- [Overview of Sales Lightbox](#)
- [Use Microsites in the Lightbox Content Library](#)
- [Available Actions for Different Content Types](#)

## Add Lightbox Presentation Feedback Subtab

The Lightbox presentation feedback resource is used to view, create, update, and delete the ratings and comments from the attendees at a Lightbox presentation session.

The feedback can apply to an individual, Lightbox document page, or to an overall Lightbox document presented during a presentation session.

Here's how to add a feedback subtab.

1. Ensure you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.
3. In the Objects navigation tree, expand **Standard Objects** then expand **Lightbox Presentation Feedback**.
4. Click the Pages node.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts section, select **Default Layout** and click the **Edit** icon.
7. In the Subtabs Region, click the **Hide Show** icon.  
The Configure Subtabs shuttle window opens.
8. Move **Feedback** from the Available Fields window to the Selected Fields window.
9. Click **OK**, then click **Done** to exit the layout editor.
10. Verify the changes by viewing the subtab when drilling into a document.



11. Publish the sandbox according to your company's business practices.

## Mass Update of Records

### How do I enable mass update of records?

Salespeople can use the mass update feature to bulk update fields on multiple records. They can update multiple fields on several object records at once, without opening each individual record.

For example, a salesperson can update the sales stage on multiple opportunities at the same time with just a few clicks. Or, a salesperson can update rank and deal size on several leads at once.

Here's the setup flow:

1. Add the Update action to the landing pages of the work areas where you want to enable the feature. Landing pages are the only pages that support the mass update feature.
2. Optionally, configure which fields salespeople can update. You can use the default fields already set if you want. Or you can configure the list yourself.
3. Optionally, set profile options to specify how many records salespeople can update at once. You can use the default value of 25 records if you want.

### Supported Objects for Mass Update

These are the predefined, standard business objects that support mass update:

- Activities
- Accounts
- Assets
- Contacts
- Sales Leads
- Opportunities

Custom objects also support mass update.

### Add the Update Action

Salespeople access the mass update feature using the Update action that you enable in the work area landing pages of classic Sales. The action appears as **Actions > Update** on the landing page toolbar.

Remember, make all Application Composer changes in a sandbox and publish the sandbox according to your company's processes.

These steps use the Opportunity object's landing page as an example. The basic steps are the same for all objects, but the navigation can be different for different objects. See the Landing Page Names in Application Composer section in this topic for the page names and navigation.

1. Navigate to **Configuration > Application Composer**.
2. Expand the **Standard Objects** tree and then expand the object you want to modify. For example, expand the **Opportunity** object.

3. Within the object you're modifying, click the **Pages** node.
4. Ensure that the **Application Pages** tab is selected.
5. In the **Landing Page Layouts** region (use the **Activities** region for the Activities object), select the **Standard layout**, and then click the **duplicate layout** icon to duplicate and edit the resulting copy. Alternatively, you can edit an existing, custom layout.
6. Now, edit the new layout. For example, to edit the Opportunities landing page, click the **edit** (pencil) icon on the Fuse Opportunity Overview Table.
7. In edit mode for the landing page, navigate to the Configure Detail Form: Buttons and Actions region.
8. In the Available Actions window, double-click the **Update** action to move it to the Selected Actions window.
9. Click **Save and Close**, then **Done**.
10. Test the changes using the steps in the Test the Changes section later in this topic.

## Set the Updatable Fields

Now that you have enabled the Update action, configure the fields salespeople can update using mass update. Each object already has several fields enabled for the mass update feature. If you want, configure this list to include other standard fields, or even custom fields. Keep in mind that if you're setting up the mass update feature for custom objects, then you must configure the list of fields that can be updated by users -- it's not optional like with standard objects.

You configure the list of mass update fields using the same custom landing page layout where you manually displayed the Update action:

1. In Application Composer, navigate to the Pages node for the object you're configuring.
2. Edit the same landing page layout where you manually displayed the Update action in the above procedure.
3. Navigate to the **Configure Mass Update Fields** region.
4. In the Available Fields box, double-click the fields that you want to make available for the mass update feature at runtime. Or, use the arrows to move the items that you want to make available. See the Rules for Certain Field Types below for some details on field types and limitations or behavior.
5. After you're done making changes, click **Save and Close**, then **Done**.

### Rules for Certain Field Types

Consider these rules for certain field types as you set up the feature:

- You can use both standard and custom fields. However, read-only fields, such as formula fields, and fields that can be conditionally updated, aren't included in the list.
- Some fixed-choice list fields are related in a parent-child relationship. This simply means that the values displayed in the child field are dependent on whatever is selected in the parent field. If you want to make a child fixed choice list field available for the mass update feature, then you must also include its parent field.

## Configure the Number of Updatable Records

You can configure the maximum number of records that users can update at once by setting profile options.

Here's the behavior:

- The default value of the profile options is 25, meaning the maximum number of records that salespeople can update at once for those objects is 25.
- The maximum number of records that can be updated at once is 500.
- If a profile option value has a null value, the application sets the number of records that can be updated at once to 10.
- For custom objects, the threshold value is set at 25 and can't be changed using a profile option.

Here are the mass update threshold profile options. The profile option codes are listed in parentheses.

| Object         | Profile Option                                                   |
|----------------|------------------------------------------------------------------|
| Activity       | Activity Mass Update Threshold Value (ZMM_MASS_UPDATE_THRESHOLD) |
| Account        | Mass Update Threshold Value (ZBS_MASS_UPDATE_THRESHOLD)          |
| Asset          |                                                                  |
| Contact        |                                                                  |
| Sales Lead     |                                                                  |
| Opportunity    |                                                                  |
| Custom objects |                                                                  |

### Set the Profile Options

1. In Setup and Maintenance, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option name in the **Profile Display Name** field. Or, enter the code in the **Profile Option Code** field.
3. Click **Search**.
4. In the list that's returned, click the profile option name link.
5. Set the profile option value as needed.
6. Save your changes.

### Test the Changes

It's a good idea to test the changes. For example:

1. Sign in as a user who has access to the object you just modified, such as a sales representative or sales manager.
2. Go to the landing page and click the Actions menu to verify that the **Update** action is available.
3. Go through the mass update flow with some records to be sure it's working as you expect. See the Related Topics for the procedures.

### Landing Page Names in Application Composer

As you modify the landing pages, it's helpful to know their names in Application Composer. Here are the pages, along with the navigation steps to get to them:

| Object in Application Composer | Navigation to Landing Page Layout                                               | Name of the Landing Page You Need to Edit |
|--------------------------------|---------------------------------------------------------------------------------|-------------------------------------------|
| Activity                       | Activity > Pages > Application Pages > Landing Page Layouts > Activities region | My Activity Overview Table                |

| Object in Application Composer | Navigation to Landing Page Layout                              | Name of the Landing Page You Need to Edit |
|--------------------------------|----------------------------------------------------------------|-------------------------------------------|
| Account                        | Account > Pages > Application Pages > Landing Page Layouts     | FUSE Account View List Table              |
| Asset                          | Asset > Pages > Application Pages > Landing Page Layouts       | Asset Overview Table                      |
| Contact                        | Contact > Pages > Application Pages > Landing Page Layouts     | Fuse Contact List Table                   |
| Sales Lead                     | Sales Lead > Pages > Application Pages > Landing Page Layouts  | Fuse Lead Overview Table                  |
| Opportunity                    | Opportunity > Pages > Application Pages > Landing Page Layouts | Fuse Opportunity Overview Table           |

#### Related Topics

- [How do I apply mass update to accounts and contacts?](#)
- [How can I enable the Mass Update feature in Workspace?](#)

## Configure Mass Update for Different User Roles

You can show a different set of mass update fields to different users in the same work area, in cases where you want users with different roles to be able update different fields.

You accomplish this by using separate custom page layouts for different user roles. If you want users with different job roles to see a different set of fields in mass update, then create different custom landing page layouts for them. For each landing page layout, you:

1. Manually display the Update action.
2. Configure a different set of mass update fields in each landing page layout that's intended for each role.
3. Assign a different role to each layout.

Here are the high-level steps add a role to a custom layout:

1. Follow the steps in the Enable Mass Update of Records topic to create the custom landing page layouts you need.
2. Navigate to the landing page layouts table for the object in Application Composer.
3. Select your custom layout.
4. Click the **Role Name** arrow in the row.
5. In the Select: Roles window, select **CRM - Job Roles** in the Role Category Filter.
6. Click the **Specific role** radio button in the Role field.
7. Click the **Show available predefined roles** check box.
8. Move the applicable role from the Available Roles shuttle region to the Selected Roles shuttle region.
9. Click **OK**.
10. Repeat for the other custom layouts you're using.

#### Example Use Case

Let's say that you don't want salespeople to be able to mass update the Sales Channel fields during mass update on a partner opportunity. But you still want channel managers to be able to mass update those fields. So you remove the Sales Channel field from the mass update list on your custom Sales Representative landing page layout. Then, add the Sales Channel field to the mass update list on your custom Channel Manager landing page layout.

## Messages

### Messages

Messages provide users with information about business or application errors or warnings.

Typically, messages inform the users about the following:

- Missing or incorrect data
- Status of an application, page, or a business object
- Status of an ongoing process
- Result of a user action

Besides notifying users about the problem, messages provide guidance to users on taking corrective action. Messages also warn users about the consequences of a certain action.

Oracle provides a set of predefined messages that are stored in a message dictionary. You can create additional messages or modify the existing ones using the Manage Messages task in the Setup and Maintenance work area.

**Note:** Don't delete predefined messages unless you're sure that they aren't used anywhere.

### Message Dictionary

The message dictionary stores messages that the application requires at run time. Messages are predefined for specific applications and modules, but a few are common messages that can be used in any application or module.

When you create messages, use the message text and the following components to cover additional details addressing users and help desk personnel:

- User Details: A detailed explanation of the message short text meant for users.
- Administrator Details: Details of the identified problem meant for the help desk personnel. The end users don't see this text.
- Cause: An end-user version of the cause of error.
- User Action: Instructions to users for addressing the identified problem. Where there is no guidance for end users, they must approach the help desk.
- Administrator Action: Corrective action that help desk personnel must take to correct the problem. This information isn't available to the end users.

#### *Related Topics*

- [Message Types](#)
- [Create and Edit Messages](#)

## Common Messages

Message names that begin with FND\_CMN are common messages. Each common message can appear in multiple places in any product family across Oracle Applications Cloud.

For example, the FND\_CMN\_NEW\_SRCH message can be used for any search to indicate that no results were found. Common messages of type error or warning are part of the message dictionary.

### Creating and Editing Common Messages

You can create common messages for use in multiple places. However, ensure that you follow the predefined naming convention and numbering series associated with the application or module.

**Note:** Don't use FND\_CMN as the prefix for the messages you create because all the predefined common messages begin with it.

Common messages can be used in any application. Therefore, consider the ramifications if you edit any aspect of the message, including incident and logging settings. Changes would be reflected in all instances where the message is used. For example, if you change the message text, ensure that the text is generic and applies to the entire site of Oracle Applications Cloud implementation.

## Notes

### Define Notes

A note is a record attached to a business object, such as an opportunity or lead. Notes capture nonstandard information received as you do business. Consider the following points when you set up notes for your application:

- Which new note types you want to add.
- How you want to map these new note types to business objects in your area.

### Note Types

Note types are assigned to notes when they're created, to categorize them for future reference. During setup you can add new note types, and use a process called note type mapping to restrict them by business object type. When deciding which new note types you want to add, keep in mind how you want your users to search for, filter, and report on these notes.

### Note Type Mappings

If you add new note types, you must map them to the business objects you use in your product area. Here are some points to consider when mapping note types:

- When you select a business object other than Default Note Types, you only see the note types that apply to that object.

- If no other note types appear, then note type mapping doesn't exist for that object and the default note types are used. Select **Default Note Types** to see which default note types exist in the application.
- If you modify a default note type, it affects all the business objects that don't have a note type mapping.

Suppose you decide to add a new note type of Analysis for your product area of Sales-Opportunity Management. You use note type mapping to map Analysis to the Opportunity business object. Now, every time you create or edit a note for an opportunity, you see Analysis as an available note type option.

When deciding which note types to map to business objects, you should keep the same considerations in mind that you did when you decided which note types to include.

## Notes Character Limit

If you're using the source code editing mode, the limit for notes is 100,000 characters. If you're using the Rich Text editing mode, HTML tags can cause the actual maximum character count to vary, as the HTML tags are also counted in the character total.

### *Related Topics*

- [About Application Composer](#)

# Orchestration

## What's Orchestration and how do I enable it?

Orchestration is a feature that guides salespeople through best sales practices for different sales situations. It also helps eliminate the need for training on various non-standard procedures unique to specific businesses. For example, through sales orchestration, salespeople receive a sequence of actionable communication steps designed to get the attention of their unresponsive prospects.

Let's say you want to provide different recommended steps for your sales organization to follow when qualifying sales leads from different lead sources, or when progressing opportunities based on product, or opportunity type, and so on. For each orchestration stage, you can specify step sequences with logical branches to perform tasks such as set up appointments, trigger automations, or take actions best suited for a sales situation.

Orchestration helps salespeople by providing sales content in the context of performed actions. For example, to help salespeople qualify leads, you can model qualification flows to qualify and convert leads. You can model cadence flows to engage unresponsive prospects and retire them if multiple attempts to contact them has proved unsuccessful. Similarly, you can use orchestration to recommend the best actions to progress opportunities through the sales cycle, handle adverse sales-situations, and leverage automation to collect key data without manual data entry.

Orchestration provides automated steps that take actions behind the scenes and follow up when things don't go as planned. For example, you can automatically send a follow-up email if a customer doesn't respond when a salesperson contacts them. Orchestration steps that require salespeople to take action appear on the Guidance panel in opportunity and lead overview pages. The panel gets displayed only if there's an active orchestration running on that specific record. In addition, orchestration can create tasks and appointments to support manual steps.

For more information, see [Enable the Orchestration Feature](#) in the How do I get started with Orchestration? solution playbook on the [Oracle Help Center Sales > Playbooks](#) page.

## Preferences

### Set Value Formats for Regional Preferences for All Users

Use profile options to set the default formats of values for regional preferences, such as date, time, number, currency, and time zone for all users.

You can set the values of specific profile options at the site layer using the Manage Administrator Profile Values page. The formats you set here are displayed for all users in the fields for regional settings on the General Preferences: Regional page. Your users can still set the value formats for themselves using the settings in the General Preferences: Regional page. Once you set the value formats for all users, if specific users don't change their value formats, the choices you have set for all users will apply to them.

To set value formats for profile options, do these steps:

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task in the Application Extensions functional area.



### 3. Set the value formats for the profile options, as required:

**Note:** Check if the profile option already has a value set for the Site profile level. If so, just edit that value. Otherwise, create a new row and select a value for the Site profile level so that your settings apply to all users.

- To set the date format:
  - i. Search for the **Default Date Format (FND\_DATE\_FORMAT)** profile option.
  - ii. In the FND\_DATE\_FORMAT: Profile Values section, click the **New** icon.
  - iii. From the **Profile Level** list, select **Site**.
  - iv. From the **Profile Value** list, select the required date format. For example, **31-1-1999**.
- To set the time format:
  - i. Search for the **Default Time Format (FND\_TIME\_FORMAT)** profile option.
  - ii. In the FND\_TIME\_FORMAT: Profile Values section, click the **New** icon.
  - iii. From the **Profile Level** list, select **Site**.
  - iv. From the **Profile Value** list, select the required time format. For example, **1:30 PM**.
- To set the number format:
  - i. Search for the **Default Number Format (FND\_NUMBER\_FORMAT)** profile option.
  - ii. In the FND\_NUMBER\_FORMAT: Profile Values section, click the **New** icon.
  - iii. From the **Profile Level** list, select **Site**.
  - iv. From the **Profile Value** list, select the required time format. For example, **-1,234.567**.
- To set the default currency:
  - i. Search for the **Default Currency (FND\_CURRENCY)** profile option.
  - ii. In the FND\_CURRENCY: Profile Values section, click the **New** icon.
  - iii. From the **Profile Level** list, select **Site**.
  - iv. From the **Profile Value** list, select the required currency. For example, **US Dollar**.
- To set the default time zone:
  - i. Search for the **Default User Time Zone (FND\_TIMEZONE)** profile option.
  - ii. In the FND\_TIMEZONE: Profile Values section, click the **New** icon.
  - iii. From the **Profile Level** list, select **Site**.
  - iv. From the **Profile Value** list, select the required time zone. For example, **US Pacific Time**.

### 4. Click **Save and Close**.

#### Related Topics

- [Set General Preferences for All Users](#)
- [How do I update existing setup data?](#)

## Set General Preferences for All Users

Use the Global Admin Preferences page to set general preferences, such as language, currency, and time zone for all users.

Use the **Set User General Preferences** task only if you want to update preferences for all users. Your users can still set preferences for themselves using the settings in the General Preferences section on the Preferences page. Once you

set the general preferences for all users, if specific users don't change their preferences, the choices you have set for all users will apply to them. You can also set the default value formats for date, time, and number in regional preferences for all users.

To set general preferences, do these steps:

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to the **Set User General Preferences** task in the Application Extensions functional area.
3. Set the required general preferences for your users.

**Note:** You can also set the value formats for regional preferences, such as date, time, and number for your users using profile options.

4. If you only want to set the preferences for new users whose preferences haven't been set by them yet, select the **Reset preferences for new users only** check box. Selecting this option excludes all users whose preferences were set at some point in time.
5. Click **Save**.

#### *Related Topics*

- [Set Value Formats for Regional Preferences for All Users](#)
- [Set Your General Preferences](#)

## Privacy Statement

### Set Privacy Statement URL

A privacy statement is legal content that tells you how a company collects and manages user data. You can add a link to your company's statement in the About This Application dialog box.

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area.
2. Search for the Privacy Statement URL (PRIVACY\_PAGE) profile option.
3. In the Profile Values section, update the **Profile Value** field with the full URL of the web page that has the privacy content. By default, this profile value is **N**.

**CAUTION:** Don't enter any other value, such as **Y**, because that causes a broken link.

4. Click **Save and Close**.

And that's it! Your users can now view the **Privacy Statement** link by clicking their user image or name in the global header and selecting **About This Application**.

# Public Unique IDs

## Overview of Public Unique IDs

When users create records in the database, the applications use document sequencing as they generate unique IDs for each business object record. These IDs are known as public unique IDs, or PUIDs. Understandably, these numbers aren't easy to read or use because of their length and complexity. To overcome the issue of long IDs, you can make these IDs more user-friendly and readable during setup.

These PUID are used in:

- The data model
- Unique sequence generation when you use advanced setup
- Global search by PUID attributes

When you integrate your sales application and other, external applications, the sales application can "call" the PUIDs from those other applications. Which application is calling depends on whether an application in the external application is calling the sales application, or whether a person is using their PUIDs.

You specify PUIDs when you create objects. For example, Party\_Number is the PUID for accounts and contacts. When a new account is created, the PUID value can be automatically created by a central routine or supplied by the end user.

In this documentation, we talk about "advanced setup" for PUIDs. This means you set up the unique sequence generation of PUIDs that's a specific prefix and radix configuration. You set these for each business object. In addition, keep in mind that PUID specifications mandate that users can search for all supported business objects by PUID and Party Number.

Many of the business objects support PUIDs, as shown in this table:

| Top-Level Object Name | Model Support (PUID Attribute Name) | Object PUID Generation | Global Search By PUID | PUID Exposed in List Management |
|-----------------------|-------------------------------------|------------------------|-----------------------|---------------------------------|
| Account               | PartyNumber (RegistryID)            | Supported              | Supported             | Supported                       |
| Action                | ActionNumber                        | Supported              | NA                    | NA                              |
| Action Plan           | ActionPlanNumber                    | Supported              | NA                    | NA                              |
| Activity              | Activity_Number                     | Supported              | Supported             | Supported                       |
| Asset                 | AssetNumber                         | Supported              | Supported             | Supported                       |
| Business Plans        | BusinessPlanNumber                  | Supported              | Supported             | Supported                       |
| Campaign              | CampaignNumber                      | Supported              | Supported             | Supported                       |

| Top-Level Object Name                                        | Model Support (PUID Attribute Name)                                                                                                                     | Object PUID Generation | Global Search By PUID | PUID Exposed in List Management |
|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|-----------------------|---------------------------------|
| Competitor (called Sales Competitor in Application Composer) | PartyNumber                                                                                                                                             | Supported              | Supported             | Supported                       |
| Contact                                                      | PartyNumber (RegistryID)                                                                                                                                | Supported              | Supported             | Supported                       |
| Custom Objects                                               | Custom Attribute                                                                                                                                        | Supported              | Supported             | Supported                       |
| Deal Registration                                            | Deal Number                                                                                                                                             | Supported              | Supported             | Supported                       |
| Interaction                                                  | InteractionNumber                                                                                                                                       | Supported              | Supported             | Supported                       |
| Lead (called Sales Lead in Application Composer)             | Lead_Number                                                                                                                                             | Supported              | Supported             | Supported                       |
| MDF Budget, MDF Claim, MDF Claim Settlement, MDF Request     | MDF Claim: Code (ClaimCode)<br>MDF Request: Code (FundRequestCode)<br>MDF Budget: Code (BudgetCode)<br>MDF Claim Settlement: Code (ClaimSettlementCode) | Supported              | Supported             | Supported                       |
| Objective                                                    | ObjectiveNumber                                                                                                                                         | Supported              | NA                    | NA                              |
| Opportunity                                                  | Opty_Number                                                                                                                                             | Supported              | Supported             | Supported                       |
| Partner                                                      | Company_Number                                                                                                                                          | Supported              | Supported             | Supported                       |
| Quote (called Sales Orders in Application Composer)          | OrderHeaderNumber                                                                                                                                       | Supported              | Supported             | Supported                       |
| Price Book                                                   | PriceBook_Code                                                                                                                                          | Supported              | Supported             | Supported                       |
| Product                                                      | ItemNumber                                                                                                                                              | Supported              | Supported             | Supported                       |
| Product Group                                                | Reference_Number                                                                                                                                        | Supported              | Supported             | NA                              |
| Program Enrollment                                           | Enrollment Number                                                                                                                                       | Supported              | NA                    | Supported                       |
| Promotion                                                    | Sales Promotion Code                                                                                                                                    | Supported              | NA                    | Supported                       |

| Top-Level Object Name                                                        | Model Support (PUID Attribute Name) | Object PUID Generation | Global Search By PUID | PUID Exposed in List Management |
|------------------------------------------------------------------------------|-------------------------------------|------------------------|-----------------------|---------------------------------|
|                                                                              |                                     |                        |                       |                                 |
| Resource                                                                     | Party Number                        | Supported              | Supported             | Supported                       |
| Service Request                                                              | SRNumber                            | Supported              | Supported             | Supported                       |
| Template Action Plan                                                         | TemplateNumber                      | Supported              | NA                    | NA                              |
| Territory (called Sales Territory in Application Composer)                   | Supported (Unique Territory Number) | Supported              | NA                    | Supported                       |
| Territory Proposal (called Sales Territory Proposal in Application Composer) | Supported (Proposal Number)         | Supported              | NA                    | Supported                       |
| Work Order                                                                   | WO_NUMBER                           | Supported              | Supported             | Supported                       |

## Your Setup Options

You have these options for setup:

- Use the default setup, where no implementation steps are required.
- Use the basic setup, which is configurable to a certain degree. If you use this setup, the default setup isn't used.
- Use an advanced setup which is more complex and configurable. The default and basic setups apply to all objects. Advanced setup is on a per-object basis.

Here's a list of setup options and where to find more information about the setup.

| Setup Option   | Description                                                                                                                                                                                                                                              | Where to Find More Information                                |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------|
| Default Setup  | In this setup, no implementation steps are required. The application automatically generates a unique 15-digit numeric ID for each record. The document sequencing begins with a 1.                                                                      | No additional documentation, other than this introduction     |
| Basic Setup    | In this setup, you set two profile options where you configure the radix (or base numbers and characters) and prefix to use. The application generates an alphanumeric public unique ID instead of the default numeric public unique ID for each record. | See the Public Unique ID Basic Setup section in this topic    |
| Advanced Setup | In this setup, you define a radix and prefix for each object. It isn't required for the radix and prefix to be different for each object.                                                                                                                | See the Public Unique ID Advanced Setup section in this topic |

## Public Unique ID Basic Setup

In the basic setup, you define a single prefix that's shared across all business objects in the implementation. In addition, you have several different radix values that can be used. Together these values form the PUIDs.

To perform the basic setup, you set these profile options:

- CRM Public Unique ID String Encoding profile option: Controls the characters used in the encoding of the public unique ID based on a radix, or base number.
- CRM Public Unique ID Prefix profile option (ZCA\_PUID\_PREFIX): Defines the optional prefix value for the public unique ID. If you use this profile option, define the prefix for the public unique ID at the site level. After you set this profile option to the prefix you want, the application inserts the prefix before the public unique ID base encoded document sequence value. For example, you may want the records for the pharmaceutical divisions of your company to be denoted with public unique IDs and the prefix Pharma or Pharma1, Pharma2, and so on. By default, the prefix has no value.
- CRM Public Unique ID String Encoding profile option (ZCA\_PUID\_RADIX): This profile option determines the set of numbers and letters used in creating the public unique ID. The default value is null. After you set the radix, the application converts the public unique ID into user-friendly IDs, using alphanumeric characters instead of numeric digits.

These base values are available when constructing the PUIDs:

- Numbers 0-9, letters A-F
- Letters A-Z, upper case
- Numbers 2-9, letters BCDFGHJKLMNPQRSTVWXYZ
- Numbers 0-9, letters ABCDEFGHJKLMNPQRTUWXY
- Numbers 0-9, letters A-Z, upper case
- Numbers 0-9, letters A-Z, letters a-z
- No alphanumeric conversion

The values for the radix are stored in the lookup type, ZCA\_PUID\_ENCODING. This lookup type is accessible using the Manage Standard Lookups task in Setup and Maintenance.

Keep these points in mind:

- If you enter a prefix value, then you must set a radix value. The length of a prefix value is 5. You can't use the prefix setting by itself.
- If you require a delimiter, then include it as part of the prefix.
- The concatenated public unique ID and prefix must not exceed the defined field length, which is usually 30 characters.

Here's how to set the profile options.

1. Sign in as a setup user.
2. In Setup and Maintenance, go to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Public Unique Identifier Profile Options
3. On the Manage Public Unique Identifier Profile Options page, click the ZCA\_PUID\_RADIX option.

4. In the ZCA\_PUID\_RADIX: Profile Values section of the page, click the **Profile Option Values** list of values and select the base numbering value.
5. Click **Save and Close**.
6. Optionally, click the ZCA\_PUID\_PREFIX option.
7. In the ZCA\_PUID\_PREFIX: Profile Values section of the page, in the **Profile Value** box, enter the prefix and the delimiter you want, if any. For example, enter `CDRM_`.
8. Click **Save and Close**.

## Public Unique ID Advanced Setup

In the advanced setup, you can define a different prefix and numbering radix for each business object, for example, Accounts, Contacts, and Opportunities. Oracle recommends that you do this to avoid PUID clashes when populating object records via import while also creating records in the UI or via REST.

Keep these points in mind:

- If you enter a prefix value, you must set a radix value. You can't use the prefix setting by itself. The length of a prefix value is 5.
- If you require a delimiter, then include it as part of the prefix.
- The concatenated public unique ID and prefix must not exceed the defined field length, which is usually 30 characters.

Use these steps to configure the radix and optionally, the prefix in the advanced setup.

1. Sign in as a setup user.
2. In Setup and Maintenance, go to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Public Unique Identifier Sequence Generation
3. On the Manage Public Unique Identifier Sequence Generation page, if you're configuring these values for the first time, add a row to the table.
4. In the Object list of values, select the object for which you're configuring the public unique ID.
5. In the Radix list of values, select the base numbering to use. This list of possible radix values is the same list of values that are provided in the ZCA\_PUID\_RADIX profile option.
6. In the Prefix box, enter the prefix you want to use for the object and unique ID.
  - Enter a maximum of five characters.
  - The allowed characters are: 0-9, A-Z, a-z, and these special characters: period, hyphen, comma, and underscore.
7. Repeat for other objects.
8. Click **Save and Close**.

This table lists options for RADIX in the Manage Public Unique Identifier Sequence Generation task. For example, the sequence looks as follows if a Lead Number is in the format of "LeadNumber":

- "CDRM\_2452" if the advanced setup for the Lead object isn't set up.
- If the advanced setup for the Lead object is set up, then the LeadNumber is created in the form of "LeadNumber" = "LEAD\_106065",
- PREFIX is LEAD\_ and RADIX is "106065", which is in the format of "No Alphanumeric Conversion".
- RADIX is in the format of "Letters A-Z, Upper Case". "LeadNumber": "LEAD\_GAXM".

| Prefix | Radix                                      |
|--------|--------------------------------------------|
| NULL   | NULL                                       |
| NULL   | Numbers 0-9, letters A-F                   |
| NULL   | Numbers 0-9, letters A-F                   |
| A-     | Numbers 0-9, letters A-F                   |
| A-     | Numbers 0-9, letters A-F                   |
| Null   | No alphanumeric conversion                 |
| A-     | Numbers 0-9, letters A-Z, letters a-z      |
| A-     | Numbers 0-9, letters A-Z upper case        |
| A-     | Numbers 0-9, letters ABCDEFGHJKLMNPQRTUWXY |
| A-     | Numbers 2-9, letters BCDFGHJKLMNPQRSTVWXYZ |
| A-     | Letters A-Z, Upper Case                    |
| A-     | Numbers 0-9, letters A-F                   |

#### Related Topics

- [Document Sequences](#)
- [Guidelines for Managing Document Sequences](#)
- [Custom Object Public Unique IDs](#)

## Migrate Public Unique ID Data

You can migrate PUIDs from a test to production instance, or the other way around.

The migration is essentially exporting the data in one instance using the ready-to-use bulk export process in the sales application and then importing the data into another instance using the import process.



## Select a Migration Approach

Consider the following points before selecting a migration approach:

- If your organization frequently uses the bulk data load (migration) functionality, then use the document sequence approach. For more information, see the related topics.
- If your organization doesn't use the bulk data load frequently, then use Oracle's standard import process to import the data from one instance to another. When PUIDs are rejected in the process, manually define new PUIDs for the rejected PUID values and repeat the import process until all the data is imported. For more information on how to import, see the *Implementing Sales* guide.

**Note:** You can't migrate transactional data.

## Manually Override PUID Values

You can manually override the PUID value during the import process. After a PUID is rejected in the import process, a new PUID value should be defined. For example, let's say SMTTXT-002 is rejected because the record already exists in the test instance. So, a new PUID value of SMTTXT-003 is defined and used in the import process.

## Set Up Document Sequencing

Every object team defines a document sequence number for objects as part of PUID implementation. When a new PUID is created in the database, the PUID functionality uptakes the value from the document sequence process. For example, if the document sequence initial value is 0, when a PUID is created in the production instance, then the sequence generation creates the PUID starting from 0. If the document sequence has a different initial value between the test and production instances, then the possibility of PUID clashes between the test and production instance is removed completely.

Organizations know how many objects are typically created in a test instance versus a production instance. Therefore, defining an appropriate initial value for document sequence in the test and production instances should resolve the PUID clashes. For more information about setting up document sequences, see Set Up Document Sequences in the Oracle Fusion Applications Developer's guide.

## Maintain Different Prefixes

You define the prefix information for specific objects in the Manage Public Unique Identifier Sequence Generation task in Setup and Maintenance. You can enter a uniquely identifiable prefix in the test instance to signify that the PUID values belong to the test instance. Similarly, while the same objects are defined in the same task flow in the production instance, enter a prefix to signify the PUID values belong to a production instance. Therefore, the PUID value as a whole never clashes when the migration occurs from the test to production instance or the other way around.

### Related Topics

- [Document Sequences](#)
- [Guidelines for Managing Document Sequences](#)

## Quoting

### Overview of the Oracle Sales and Oracle CPQ Integration

The integration between Oracle Sales and Oracle CPQ supports standard B2B selling processes, which feature highly configurable products, variable or dynamic pricing models, discount negotiations requiring executive approval, and large, branded sales documents.

Oracle CPQ ensures that sales forecasts are reliable and based on real-world quotes. It ensures that sales orders are valid and contain the correct billing and shipping details to eliminate costly change orders. Additionally, quote data feeds back into Sales, so that businesses can analyze and improve the overall efficiency of their sales teams.

The integration steps help you configure a solution that combines the power of these applications, while reducing the cost of ownership and the time needed to deploy the application. However, the integration remains configurable and extensible, so it can support a wide range of use cases serving any industry. For more information, see [Overview of Planning Your Implementation](#).

## Recent Items

### About Recent Items

As they work in an application, salespeople see their most recent items in the Find search boxes, in the Recent Items list (accessible from the favorites icon in the global header), and in other lists.

A salesperson's recently accessed or updated records is supplied by the Recent Items API.

### Scenarios for When Recent Item Relationships Occur

The application captures recent items any time a sales user interacts with a record, whether that be creating, updating, or simply viewing the record. That record then shows up in the Find box for that object. Note that recent items don't appear in other objects' Find lists. Say, for example, a salesperson creates an opportunity, that record's creation won't show up in the Activities Find list. But, they can show up in lists of values within a record, such as an account recent item showing up in the list of accounts in an opportunity.

**Note:** By default, the application keeps recent items in the database for 30 days. You can configure this time frame, however. See the Specify How Long to Keep Recent Items topic for more information.

These simple scenarios illustrate events that cause the Recent Item API to establish a recent items relationship with a record or with the application itself:

- A user creates a record, such as a lead, an opportunity, or an activity like a task or appointment.
- A user drills into the edit page of a record that's not among the recent items, for example, the user opens a task.
- A user signs out of the application.

This scenario is a little more complex and illustrates how recent items can appear in other objects:

- An appointment has Opportunity 1 associated with it.
- The user edits Opportunity 2 and saves the opportunity.
- The user goes into the same appointment and removes Opportunity 1 and clicks on the drop-down list for opportunities, to associate a different opportunity with the appointment.
- In the appointment's drop-down list for opportunities, the application shows the last opportunity (Opportunity 2) first in the list.

If a record is created, the `CREATION_DATE` and `CREATED_BY` attributes are captured accordingly. If a record is updated, then the `LAST_UPDATE_DATE` and `LAST_UPDATED_BY` attributes are modified accordingly.

But, remember that users don't have to update a record for it to be recorded as a recent item. Whether the record is updated or not, the application always records even the viewing of a record as a recent item.

## Specify How Long to Keep Recent Items

You can configure how long to keep recent items in the database. The default is 30 days, and you can change that time by setting the profile option, Days to Keep Recent Items (`ORA_ZCA_RECENT_ITEMS_PRESERVE_DAYS`).

Use the Manage Administrator Profile Values task in Setup and Maintenance to access the profile option.

The process Purge Application Metrics runs weekly to automatically purge and optimize the list of recent items. You can also schedule the process manually in the Scheduled Processes UI.

**Note:** If recent items aren't deleted periodically, the application stores the data, and storing large amounts of recent items data can impact performance.

## Service Request Management

### Overview of Service Request Management

Service request management functionality lets you manage and deliver a streamlined service in response to service requests. Delivering consistent answers to customer questions helps ensure that service requests are resolved efficiently and effectively.

Service request management lets you:

- Create service requests
- Enter summary information into service requests
- Add products and product groups to service requests
- Organize service requests into queues
- Compose and send messages from service requests
- Add contacts to service requests

- Add team members to service requests
- Automatically or manually assign service requests to other users
- Create activities for service requests
- Share service request information
- Associate and view items in the knowledge base
- Integrate with the partners application to capture and resolve issues reported by your partner accounts

See the [Using Fusion Service](#) guide for more information about sales user tasks for service requests.

## Summary of Setup Tasks

Here's a summary of the setup tasks:

- Enable the Service offering
- Understand the predefined service request job and duty roles
- Define service request assignment rules
- Enable the sales catalog for service requests
- Enable outbound email messages for service requests
- Configure service request categories
- Configure knowledge base settings for service requests
- Modify service request lookups

See the [Implementing Fusion Service](#) guide for more information about service requests setup tasks.

## Time Zone

### Specify Customer Time Zones

You can use the Time Zone lookup type, `ORA_HZ_TIMEZONE_CODES`, to modify the list of time zones for account and lead contacts.

After you enable the Time Zone field using Application Composer, the attribute is exposed in REST APIs and in the UI. Salespeople can edit the attribute to adjust the time zone value from the initial value that was derived from the primary address.

Time zone codes can be viewed and managed in Setup and Maintenance under Manage Standard Lookups by searching for `ORA_HZ_TIMEZONE_CODES`.

The Time Zone lookup type supports 38 standard time zone values.

#### *Related Topics*

- [Add the Time Zone Field to Contacts Pages](#)

# Watchlist

## Overview of the Watchlist

The Watchlist is a portlet that displays a list of a user's transaction-related items, such as expenses. It's available using the Watchlist icon in the global header.

For all users across the site, you can disable or enable predefined Watchlist categories and items, edit their names, and determine how often item counts refresh.

For more information, see the related topics.

### *Related Topics*

- [Disable or Enable Watchlist Categories and Items](#)
- [Refresh Intervals for Watchlist Items](#)
- [Create Watchlist Items](#)
- [Set Watchlist Preferences](#)



# 8 Multiple Business Units

## About Business Units

As part of your enterprise structure in the applications, the business unit (BU) primarily serves as a container or construct that can be used to separate or share setup and reference data.

A business unit typically performs one or many business functions and has a specific place in the organization hierarchy. Usually, each business unit has a manager, strategic objectives, a level of autonomy, and responsibility for its profit and loss.

A business unit can:

- Process transactions on behalf of many legal entities and post transactions to its own primary ledger.
- Segment transactional data from other business units. For example, if you run your Sales business separately from your Marketing business, you segment the Sales business data to prevent access by the Marketing employees.
- Report on transactions.
- Share sets of reference data across applications. Business units process transactions using reference data sets that reflect your business rules and policies across the company. You can share reference data, such as payment terms and transaction types, across business units, or you can choose to have each business unit manage its own set, depending on the level at which you want to enforce common policies.

## Business Unit Terminology

Be aware of the following terminology as you implement and work with multiple business units:

- Master data: Data that's managed globally and isn't specific to any BU. Examples include:
  - Accounts: Customer accounts can't be segmented by BU.
  - Users: Users can be associated to BUs through their resource organization membership, but in general are managed globally.
  - Products: While different BUs might sell different products, the definition of a product is global.

**Note:** Access to master data, such as accounts and contacts, must be driven through territory-based assignment. Master data can't be segregated by business unit.

- Reference data: This is data that's used by transactional objects like leads and opportunities. Reference data can be different across BUs or common across BUs. Reference data is organized into reference data sets, also called sets, each with a unique Set ID. Examples include:
  - Lookup types, such as those that provide lists of values for several fields in opportunities and leads
  - Opportunity sales methods, available for modification in the sales methods setup pages
- Transactional data: This is the sales user data, such as that associated with leads, opportunities, and contracts that are created during a typical sales process.

# Overview of Multiple Business Units in Sales

Setting up your enterprise structure with multiple business units (BUs) lets you have separate units that can perform different business functions and that can be rolled up into the management hierarchy.

In the sales applications, these business objects support the use of multiple BUs:

- Contracts
- Leads
- Opportunities
- Resource Organizations
- Territories

## Benefits of Using Multiple BUs

Before implementing a multiple-BU model, think about how your organization would benefit from implementing multiple BUs. This evaluation is, of course, specific to each organization, but some of the considerations include:

- Access customer data across BUs: Realize a complete, single view of your customers and their interactions across all BUs.
- Global reporting and forecasting: Get company-wide analytics for key stakeholders and executives. Forecasting and pipeline management can be done globally.
- Standardize business processes: Use best practices and standardize sales processes across the enterprise.
- Improve collaboration: Sales teams across BUs can collaborate on deals with the same customer, avoiding conflicts for similar products and improving cross-sell and upsell opportunities.
- Reduce integration costs and data duplication: Fewer integrations are needed between sales and ERP systems, with improved data quality in the sales system.
- Reduce duplicate development: Lower ownership costs for implementation and consulting resources. Avoid duplication of setups and company-defined development artifacts.
- Reduce subscription costs: Users supporting different BUs don't need to sign on to multiple systems that require separate licenses.

## Benefits of Multiple BUs

In the sales applications, depending upon your business needs, structuring your enterprise with multiple BUs can be beneficial within the sales business objects that support multiple BUs.

This table lists some of the ways your implementation can benefit from using multiple BUs:

| Business Object | Usage or Benefit                                                                                                                                                                                                     | More Information                                                                                                           |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| Contracts       | <ul style="list-style-type: none"><li>• You can associate contracts with a BU, allowing them to be restricted by BU.</li><li>• You can specify some Contract Terms Library components at the BU level. For</li></ul> | See the topics on setting up business units for the contract terms library in the Implementing Enterprise Contracts guide. |



| Business Object        | Usage or Benefit                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | More Information                                                                                                                                                                                                                                                                               |
|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                        | example, you can enable clause and template adoption at the BU level.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                                                                                |
| Leads                  | <ul style="list-style-type: none"> <li>You can associate leads with a BU, allowing transactional data to be restricted by BU.</li> <li>You can select which assignment rules and assessment templates to use for your leads.</li> <li>You can use set-ID-enabled lookups to segregate lookup values by BU. This type of configuration lets you present different lookup values to users in different BUs.</li> </ul>                                                                                                                                                                                                        | <p>See these topics in this chapter:</p> <ul style="list-style-type: none"> <li>Overview of Multiple Business Units in Leads</li> <li>Set Leads Business Unit Properties</li> <li>Add the Business Unit Field to Leads</li> <li>Map the Lead Business Unit for Territory Assignment</li> </ul> |
| Opportunities          | <ul style="list-style-type: none"> <li>You can associate opportunities with a BU, allowing transactional data to be restricted by BU.</li> <li>You can use set-ID-enabled lookups to segregate lookup values by BU. This type of configuration lets you present different lookup values to users in different BUs.</li> <li>You can set profile options at the BU level, including the close opportunity required fields, default sales method, and territory assignment method.</li> <li>You can associate several opportunity attributes with a set ID, allowing them to be shared across reference data sets.</li> </ul> | <p>See these topics in this chapter:</p> <ul style="list-style-type: none"> <li>Overview of Multiple Business Units in Opportunities</li> <li>Set Opportunity Business Unit Properties</li> <li>Add the Business Unit Field to Opportunities</li> </ul>                                        |
| Resource Organizations | You can associate sales resources and resource organizations with a BU, thereby limiting the sets of data that the sales resources have access to.                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | <p>See these topics in this chapter:</p> <ul style="list-style-type: none"> <li>Overview of Sales Resources and Multiple Business Units</li> <li>Associate Business Units with Resource Organizations</li> </ul>                                                                               |
| Territories            | You can define the coverage of a sales territory by selecting a BU. Leads and opportunities identified with your defined BU are assigned to the territory.                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | <p>See:</p> <ul style="list-style-type: none"> <li>Territories Defined with Business Units topic in this chapter</li> <li>Territories chapter section on dimensions</li> </ul>                                                                                                                 |

Here's an illustration of the different data types associated with multiple business units. The diagram shows master data, such as customer data, products, and users, independent of BU-stripped data. The BU-stripped data includes reference data, transactional data, and resource organization and resource user data.



In the use case, Vision Enterprises is a global high-technology company with two divisions: Vision Corp., focused on software, and Vision Systems, selling high-end servers and engineered systems that combine hardware and software in a single stack. Both divisions operate globally across North America, Europe, and Asia Pacific regions, so they create BUs for each of these areas.

```
graph TD; VE[Vision Enterprises] --> VC[Vision Corp  
(Software Division)]; VE --> VS[Vision Systems  
(Servers Division)]; VC --> NABU1[North America BU]; VC --> EBU1[Europe BU]; VC --> ASBU1[Asia BU]; VS --> NABU2[North America BU]; VS --> EBU2[Europe BU]; VS --> ASBU2[Asia BU];
```

## Sales Administrator and Multiple BUs

## Related Topics

- Multiple Business Units High-Level Setup Steps

# Setup Tasks

## Multiple Business Units High-Level Setup Steps

Before you begin implementing multiple business units (BUs) in your sales application, you need to consider all of the steps and options available.

Here are the high-level steps to set up multiple-BU functionality in sales, along with where to find more information about each step. All of these steps may or may not be necessary, depending upon which product or business object you're enabling for multiple BU support.

**Note:** For the purposes the multiple-BU setup in sales, Oracle assumes that your company's basic enterprise structure, including a legal entity, legal division, and organizations, is already set up. See the Getting Started with Your Sales Implementation guide for more details.

| Step                                                            | Description                                                                                                                                                                                      | Where to Find More Information                                                                                                                                                                      |
|-----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Set sales profile options to enable multiple BUs functionality  | Set two profile options to enable the multiple-BU functionality.                                                                                                                                 | See the topic, Set Sales Business Unit Profile Options                                                                                                                                              |
| Create additional BUs                                           | Define additional business units in the Setup and Maintenance work area. If you have already done this as part of your enterprise setup, then you can skip this step.                            | <ul style="list-style-type: none"><li>• See the topic, Define Business Units</li><li>• The guide, Oracle Applications Cloud Understanding Enterprise Structures</li></ul>                           |
| Set business unit functions                                     | A business function describes how a business unit is used. You must set business unit functions. If you have already done this as part of your business unit setup, then you can skip this step. | See the topic, Set Business Unit Functions                                                                                                                                                          |
| Create set-enabled reference data                               | If you're going to partition reference data by BU, you must create additional reference data sets for set-enabled attributes of objects.                                                         | See these topics: <ul style="list-style-type: none"><li>• Overview of Managing Reference Data</li><li>• Create Reference Data Sets</li></ul>                                                        |
| Assign a default reference data set to business units           | For each BU for which you want to partition data, assign it a default reference data set.                                                                                                        | See the topic, Specify Business Unit Set Assignments                                                                                                                                                |
| Associate sales resources with BUs using resource organizations | While most sales resources are associated with a single BU, overlay teams might need to work with multiple BUs. You can associate sales team members with one or more BUs.                       | See these topics: <ul style="list-style-type: none"><li>• Overview of Sales Resources and Multiple Business Units</li><li>• Associate Resource Organizations With Multiple Business Units</li></ul> |

| Step                                                                     | Description                                                                                                                                                     | Where to Find More Information                                                                                                                                                                                               |
|--------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                          |                                                                                                                                                                 | <ul style="list-style-type: none"><li>Multiple Business Units and Data Access, in the Securing Sales and Fusion Service guide</li></ul>                                                                                      |
| Associate BUs with territories                                           | If you want to assign sales team members within territories by BU, you can assign the Business Unit dimension to territories.                                   | See these topics: <ul style="list-style-type: none"><li>Territories Defined with Business Units</li><li>How You Model Your Sales Organization</li><li>How to Set Up Territory Dimensions</li></ul>                           |
| Enable leads and partners to use multiple BUs                            | You can specify lead attributes and some partner attributes at the BU level.<br><br>Use Application Composer to enable the Business Unit field in the leads UI. | See these topics: <ul style="list-style-type: none"><li>Overview of Multiple Business Units in Leads</li><li>Set Leads Business Unit Properties</li><li>Add the Business Unit Field to Leads</li></ul>                       |
| Enable opportunities to use multiple BUs                                 | Specify opportunity attributes at the BU level.<br><br>Use Application Composer to enable the Business Unit field in the opportunities UI.                      | See these topics: <ul style="list-style-type: none"><li>Overview of Multiple Business Units in Opportunities</li><li>Set Opportunity Business Unit Properties</li><li>Add the Business Unit Field in Opportunities</li></ul> |
| Move opportunities or leads to another BU                                | Run the Migrate Lead and Opportunity Business Unit Data scheduled process.                                                                                      | See the Migrate Lead and Opportunity BU Data topic in this chapter                                                                                                                                                           |
| Implement company-defined, BU-specific business processes and UI layouts | Use Oracle Application Composer to define and manage UI layouts, workflows, validations, and triggers for different BUs.                                        | See the Configuring Applications Using Application Composer guide and the chapters on extending business objects in this guide                                                                                               |

#### Related Topics

- [Associate Resource Organizations with Multiple Business Units](#)
- [Multiple Business Units and Data Access for Sales Objects](#)

## Set Sales Business Unit Profile Options

To enable multiple business units (BUs) for sales, you must set two profile options.

- Multiple Business Units Enabled (HZ\_ENABLE\_MULTIPLE\_BU\_CRM): Set this profile option to Yes. The default value is No.
- Customer Relationship Management Business Unit Default (HZ\_DEFAULT\_BU\_CRM): Set this to the default sales business unit.

**Note:** If you exported values for business unit profile options and then imported them into another environment, keep in mind that the values aren't retained, and you need to set them each time after export/import.

To set the profile options:

1. In Setup and Maintenance, go to:
  - o Offering: Sales
  - o Functional Area: Company Profile
  - o Task: Manage Common CRM Business Unit Profile Options
2. In the Manage Common CRM Business Unit Profile Options page, select the HZ\_ENABLE\_MULTIPLE\_BU\_CRM profile option and set it to Yes.
3. Click **Save and Close**.
4. Select the HZ\_DEFAULT\_BU\_CRM profile option and set it to the default sales business unit.
5. Click **Save and Close**.

#### Related Topics

- [About Business Units](#)
- [Overview of Multiple Business Units in Sales](#)
- [Associate Resource Organizations with Multiple Business Units](#)
- [Multiple Business Units High-Level Setup Steps](#)

## Overview of Enterprise Setups

A single business unit (BU) is created for you when you first set up the sales applications. You can define additional BUs in as needed. If you have already done this as part of your enterprise setup, then you can skip this step.

The setup of business units is part of the enterprise structure setup. This table shows what you need to do to set up enterprise structures. For the purposes of the sales multiple-BU setup, we assume that your company's basic enterprise structure, including a legal entity, legal division, and organizations, is already set up.

| Step                                       | Description                                                                                                                                                                                                                                  |
|--------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Define Enterprise                          | Define the enterprise to get the name of the deploying enterprise and the location of the headquarters. This step is completed for you as part of your initial setup. See the <a href="#">Implementing Sales</a> guide for more information. |
| Define Enterprise Structures               | Define enterprise structures to represent an organization with one or more legal entities under common control. Define organizations to represent each area of business within the enterprise.                                               |
| Define Legal Jurisdictions and Authorities | Define information for governing bodies that operate within a jurisdiction.                                                                                                                                                                  |
| Define Legal Entities                      | Define legal entities and legal reporting units for business activities handled by the Oracle cloud applications.                                                                                                                            |
| Define Business Units                      | Define business units of an enterprise to perform one or many business functions that can be rolled up in a management hierarchy.                                                                                                            |

| Step                                  | Description                                                                                                                                                                                                                                       |
|---------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                       |                                                                                                                                                                                                                                                   |
| Define Financial Reporting Structures | Define financial reporting structures, including organization structures, charts of accounts, organizational hierarchies, calendars, currencies and rates, ledgers, and document sequences used in organizing the financial data of a company.    |
| Define Chart of Accounts              | Define chart of accounts including hierarchies and values to enable tracking of financial transactions and reporting at legal entity, cost center, account, and other segment levels.                                                             |
| Define Ledgers                        | Define the primary accounting ledger and any secondary ledgers that provide an alternative accounting representation of the financial data. Some sales implementations don't need to record accounting transactions and thus don't need a ledger. |
| Define Accounting Configurations      | Define the accounting configuration that's the framework for how financial records are maintained for an organization.                                                                                                                            |
| Define Facilities                     | Define your manufacturing and storage facilities as inventory organizations if your company tracks inventory balances there and item organizations if your company only tracks the items used in the facility but not the balances.               |
| Define Reference Data Sharing         | Define how reference data in the applications is partitioned and shared.                                                                                                                                                                          |

For detailed concepts about implementing the enterprise structure, read the guide, *Oracle Fusion Cloud Applications: Understanding Enterprise Structures*, available on *Oracle Help Center*. The use case in the topic, *Multiple Business Units in Sales: Overview*, can help you with a sample structure.

For a procedure on how to create additional business units, see the topic, *Define Business Units*.

#### Related Topics

- [Enterprise Structures Business Process Model](#)
- [Guidelines for Configuring Global Enterprises](#)

## Define Business Units

You define business units in the Setup and Maintenance work area. You can skip this step if you have already created business units when you set up your enterprise structure.

**Note:** Remember, a single business unit is created for you when you initially set up your applications. The profile option, HZ\_ENABLE\_MULTIPLE\_BU\_CRM enables multiple-BU functionality for the sales applications, and it must be set to yes in order to be able to create additional BUs.

Here's how to create additional business units:

1. In Setup and Maintenance, go to:
  - o Offering: Sales
  - o Functional Area: Company Profile
  - o Task: Manage Business Unit
2. In the Manage Business Units page, select the create icon, or select **Create** from the Actions menu.
3. In the Create Business Unit page, in the **Name** field, enter a name for the BU.
4. Optionally, enter the **Manager** and a **Location**.
5. Ensure that the **Active** check box is selected.
6. Pick a **Default Set** for the BU. This is the reference data set that the BU will use.  
For more information on reference data sets, see the topics on reference data sets.
7. Click **Save and Close**.

#### Related Topics

- [Reference Data Sets](#)
- [Overview of Multiple Business Units in Sales](#)

## Set Business Unit Functions

A business unit can perform many business functions. A business function represents a business process, or an activity, that can be done by people working within a business unit. It describes how a business unit is used.

You must set up business unit functions in the Setup and Maintenance work area. If you have already done this as part of your business unit setup, then you can skip this step.

To set business unit functions:

1. Sign in as a setup user or as the sales administrator.
2. In Setup and Maintenance, go to:
  - o Offering: Sales
  - o Functional Area: Company Profile
  - o Task: Assign Business Unit Business Function
3. If, after selecting the Assign Business Unit Business Function task, a Select Scope dialog window appears showing two radio buttons, select the Assign Business Unit Business Function option.
  - a. Select the arrow in the Business Unit field.
  - b. Click the **Select and Add** option.
  - c. Click **Apply and Go to Task**.
  - d. In the Select and Add: Business Unit page, search for and select the BU that you're assigning a function to.
  - e. Click **Select and Add** in the dialog window.
4. After you select a BU, the Assign Business Functions page appears. In the Business Unit Functions list, select the functions that apply to the business unit.

For more information about business unit functions, see the topic, Business Functions.

5. Click **Save and Close**.

*Related Topics*

- [Overview of Multiple Business Units in Sales](#)
- [Business Functions](#)

## Overview of Managing Reference Data

Reference data is data that's associated with transactional objects, such as leads and opportunities. Reference data is organized into reference data sets.

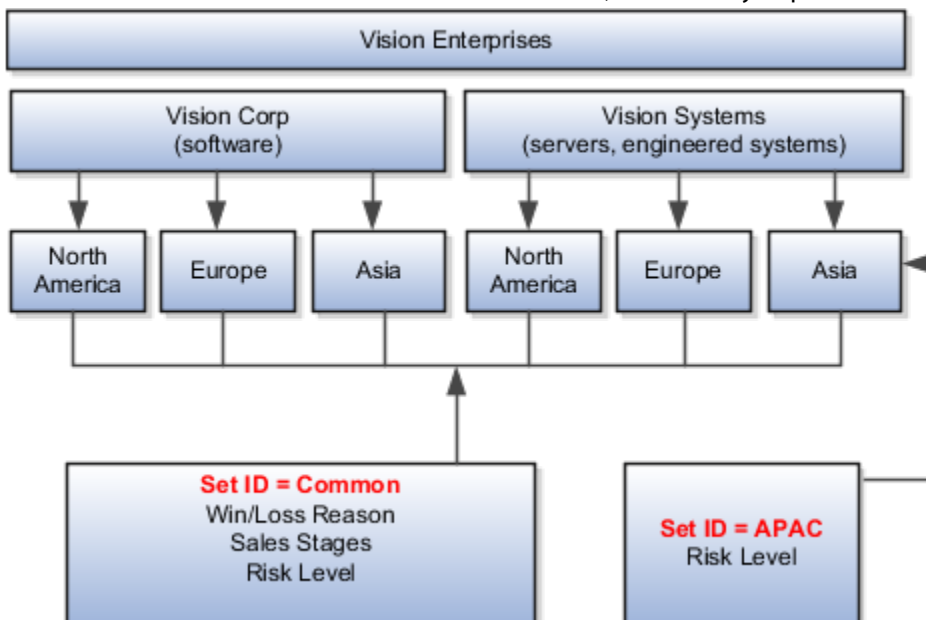
The reference data model lets companies separate transactional data so that it can be used across business units (BUs) or only for specific BUs. A data set called the Common set is predefined with the application. You can use the Common set for reference data that you want to share across business units. You can also create and maintain company-defined sets and assign them to specific BUs.

Examples of reference data include lists of values, such as the Win/Loss Reason list of values in opportunities, opportunity sales methods lists, opportunity sales stages lists, and price lists.

All reference data is tagged with a configuration ID called Set ID. For example, every value in a list of values in an opportunity is tagged with a Set ID.

You can create separate sets and subsets for each business unit. Alternatively, you can create additional common sets or subsets to enable sharing reference data across several business units, without duplicating the reference data.

This illustration shows an example of reference data in the Common set and different reference data in a set called APAC. Users associated with the BUs assigned to the Common set can access the data associated with it, but they can't access the data associated with the APAC BU, unless they're part of the BUs assigned to that reference data.



You assign reference data sets to set-enabled attributes in the Manage Business Unit Set Assignment page in Setup and Maintenance. For a procedure on assigning data sets to set-enabled data, see the topic, [Specify Business Unit Set Assignments](#).



## Create Reference Data Sets

Reference data is organized into reference data sets. You create reference data sets in the Manage Reference Data Sets page in Setup and Maintenance.

Use the following procedure to create reference data sets. In a later step, you assign them to business units. If you have already created reference data sets, you can skip this step.

1. Sign in as a setup user or as the sales administrator.
2. In Setup and Maintenance, go to the Sales offering and search for the Manage Reference Data Sets task.
3. Click the new icon, or select **New** from the actions menu.
4. On the Manage Reference Data Sets page, enter the appropriate data in the following fields:
  - Set Code: Enter a unique code.
  - Set Name: Enter the name of the set.
  - Description: Enter a description of the set.
5. Click **Save and Close**.

### Related Topics

- [Overview of Managing Reference Data](#)
- [Specify Business Unit Set Assignments](#)

## Specify Business Unit Set Assignments

If you're partitioning reference data so that different business units (BUs) can use different sets of data, you must assign a default set to each business unit.

You may have already done this when setting up BUs. If that's the case, then you can skip this step. If you do specify set assignments as described here, these settings override the setting in the business units edit page.

Use the following procedure to assign reference data sets to business units.

1. In Setup and Maintenance, go to the following:
  - Offering: Sales
  - Functional Area: Company Profile
  - Task: Manage Business Unit Set Assignment
2. In the Manage Business Unit Set Assignment page, for each reference data object, select the set that you want to assign to the business unit.
3. Click **Save and Close**.

### Related Topics

- [Overview of Multiple Business Units in Sales](#)

# Sales Resources and Multiple Business Units

## Overview of Sales Resources and Multiple Business Units

You can map multiple business units (BUs) to your resource organizations in order to regulate sales users' visibility into transactional data. Transactional data is the data found in business objects such as opportunities, leads, and contracts.

**Note:** Before coming to this content, we assume you have already created a resource organization hierarchy according to the instructions in the *Implementing Sales* guide.

### Sales User Access to Transactional Data

Sales users' access to transactional data for an object is the same in multiple BU environments and single BU environments. That is, sales users can access object data across BU boundaries provided that they have valid access to the object by means of territory or team membership, through the resource hierarchy, or by being granted full access to the object. For example, a sales representative can have access to data as determined by team and territory membership, irrespective of the BUs she's associated with.

Business unit assignment can, however, indirectly affect a user's access to object transactional data. In a multiple BU environment, BUs are available as territory dimensions and can be included as part of the territory coverage definition for the assignment of transactions. A sales user gains access to object data through territory membership. If BU is specified as a territory dimension, then the user's access to data is limited to objects which, when they were created, were assigned to the same BU that's assigned to the user's territory team. For more information about data access and users, see the topic, *Multiple Business Units and Data Access*, in the *Securing CX Sales and Fusion Service* guide.

### Sales Administrator Access to Business Units

Sales administrators, who are created as resources in the organization, have access to all of the data available in the BUs to which they're associated.

### Use Case With Resources Across Business Units

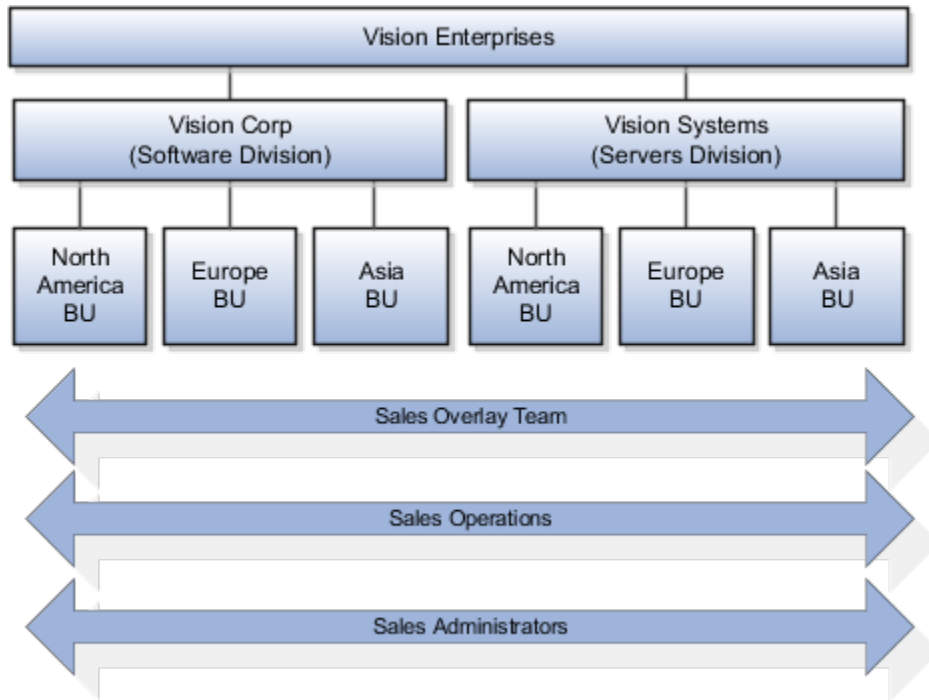
In some cases, you may want to have certain types of users have visibility into data across BUs. For example, you may want your overlay sales representatives to have access to all BUs. Here are some examples:

- Associate overlay sales representatives with all business units and differentiate them using territory dimensions, such as geographic region of responsibility.
- Associate sales operations and sales administrators to one, many, or all business units.

In the use case, Vision Enterprises is a global high-technology company with two divisions: Vision Corp., focused on software, and Vision Systems, selling high-end servers and engineered systems that combine hardware and software in a single stack. Both divisions operate globally across North America, Europe, and Asia Pacific regions, so they create BUs for each of these areas.

The following figure shows the use case. The diagram shows Vision Enterprises as encompassing its two divisions, Vision Corp. and Vision Systems. The diagram shows the two divisions, Vision Corp. and Vision Systems, as each encompassing three BUs: North America, Europe, and Asia Pacific. The diagram shows the following types of

users having access to all BUs under both divisions: sales overlay team, sales operations, and sales administrators.



#### Related Topics

- [Overview of Multiple Business Units in Sales](#)
- [Overview of Data Sharing Mechanisms and Visibility](#)
- [Multiple Business Units and Data Access for Sales Objects](#)

## Multiple Business Units in Territories

### Territories Defined with Business Units

You can use the Business Unit dimension in your territory setup to define territory coverage. A territory's jurisdiction can include one, multiple, or all business units (BUs).

In opportunity and lead assignment, when the BU associated with the opportunity or lead matches the BU mapped to the territory, the sales team members within that territory get assigned to the lead or opportunity product.

When you implement territories, enable the Business Unit dimension. When you build your territory hierarchy, you can use the business unit dimension in the territory coverage. You always have just one territory hierarchy, with one top-level territory. In a typical multiple business unit implementation, you define first-level territories by business unit.

The Business Unit dimension also helps facilitate the loading of territory metrics, partitioned by BUs.

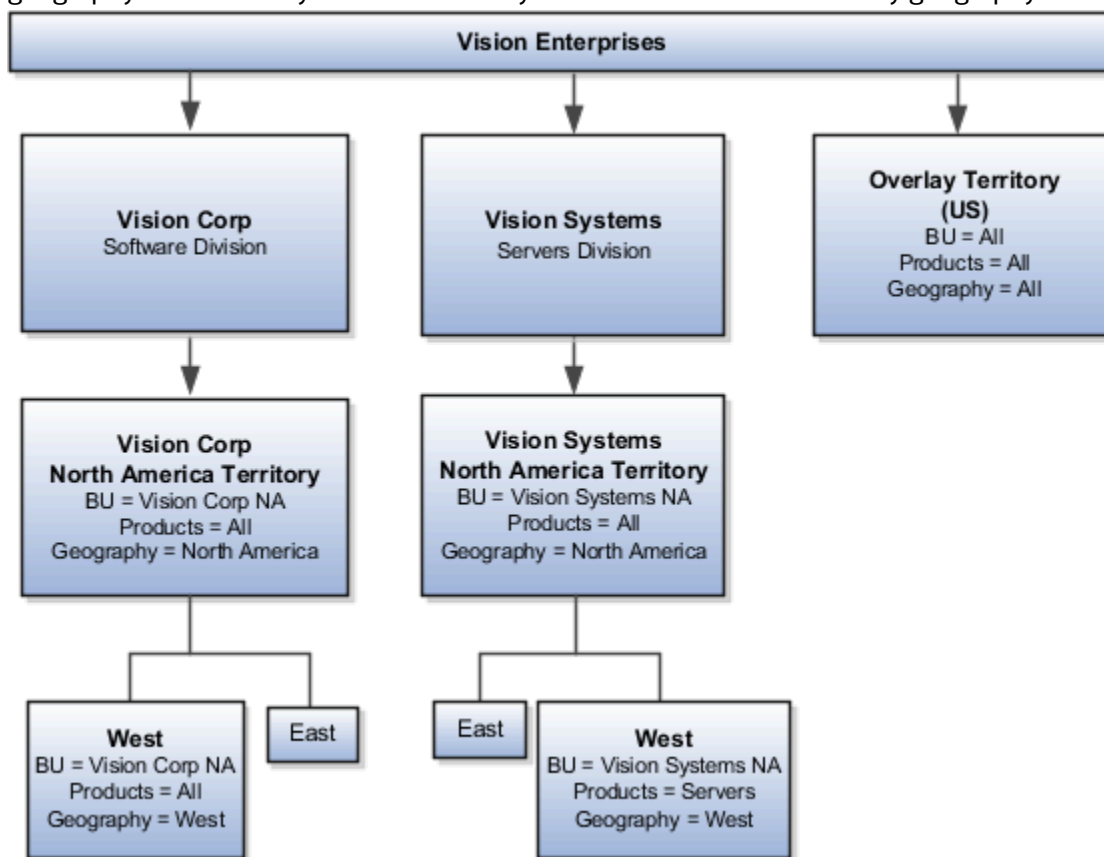
**Tip:** Assignment of sales accounts ignores the Business Unit dimension.

## Use Case

In this use case you have one territory hierarchy with one top-level territory. The Vision Enterprises territory has this structure:

- One overlay territory that includes all products and all geographies. Child territories can be added to further delineate overlay team member responsibility by product or geography.
- A territory for each business unit. Child territories are defined by product or geography.

This chart shows the use case. Vision Enterprises has two divisions, Vision Corporation and Vision Systems. Each division has three business units, and therefore three first-level territories defined by these business units. The overlay territory is defined with all business units, and the Vision Corporation North America territory defined by the Vision Corp NA BU. The Vision Systems North America territory is defined by the Vision Systems NA BU. The Vision Corp NA territory has child territories defined by geography. The Vision Systems NA territory has child territories defined by geography and by product.



## Multiple Business Units in Leads

### Overview of Multiple Business Units in Leads

Using multiple business units (BUs) in leads lets you offer different versions of the Leads UI according to the BU of the user.

Users in one BU can't view leads from another BU if they don't have the appropriate access. However, you can present different drop-down lists for leads in different BUs.

## Multiple Business Units in Leads Use Case

Let's say your company has two divisions, each with three BUs for the geographical areas where they do business: North America, Europe, and Asia. The sales processes between the three business units is different. You can tailor the Leads pages based on the different business units.

For example, when a lead is created in the North America BU, salespeople have a finite set of values to select from in the Lead Reject Reason drop-down list. In contrast, salespeople who work in the Europe BU have different reasons for rejecting a lead and must use values that are specific to their business unit.

## Set ID Lookup Types

To enable different values in a drop-down list for a specific BU, you use the supplied set-ID enabled lookup types for leads.

This table shows the leads set-ID lookup types, the values, and the descriptions. Use the **Manage Set Enabled Lookups** task from the Setup and Maintenance work area to access the lookup types related to leads.

| Lookup Type                      | Lookup Values                                                                                                         | Description                                                                                         |
|----------------------------------|-----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| Lead Qualification Budget Status | <ul style="list-style-type: none"><li>Approved</li><li>Pending</li><li>Unknown</li></ul>                              | The approval status of a customer budget. The data is used to assess the lead qualification status. |
| Lead Rank                        | <ul style="list-style-type: none"><li>Cold</li><li>Hot</li><li>Warm</li></ul>                                         | Lead rank values used as a measure of lead quality and prioritization.                              |
| Lead Reassignment Reason         | <ul style="list-style-type: none"><li>No activity</li><li>Other</li><li>Workload</li></ul>                            | Possible reasons specified for reassigning leads.                                                   |
| Lead Reject Reason               | <ul style="list-style-type: none"><li>Duplicate lead</li><li>Failed to reach contact</li><li>Incorrect data</li></ul> | Possible reasons specified for rejecting leads. Rejected leads can be reassigned or retired.        |
| Lead Retire Reason               | <ul style="list-style-type: none"><li>Duplicate lead</li><li>No purchase interest</li></ul>                           | Possible reasons for retiring leads. Retired leads are considered closed leads.                     |
| Lead Registration Type           | <ul style="list-style-type: none"><li>Co-sell</li><li>Referral</li><li>Resale</li></ul>                               | Types of leads available for partners.                                                              |
| Lead Source Channel              | <ul style="list-style-type: none"><li>Direct mail</li><li>E-Mail</li><li>Fax</li></ul>                                | Source channel responsible for lead generation.                                                     |

| Lookup Type     | Lookup Values                                                                                                                                                                                                                   | Description                                                                                                       |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"><li>Marketing Cloud</li><li>Phone</li><li>Sales visit</li><li>Social</li><li>Company website</li><li>Wireless message</li><li>Model-based prediction</li><li>Rules-based prediction</li></ul> |                                                                                                                   |
| Lead Time Frame | <ul style="list-style-type: none"><li>3 months</li><li>6 months</li><li>9 months</li><li>12 months</li><li>15 months</li><li>18 months</li></ul>                                                                                | Lead cycle duration that usually coincides with a typical sales cycle duration for products and services offered. |

## Business Units in the Leads UI

Some users can transact in multiple BUs, for example, salespeople who are members of different sales teams. These users can select the BU they want when the lead is being created but note that the business unit can't be changed once the lead is created. Based on their selection, the set ID-enabled lookup types display based on the BU of their choice.

## Additional Leads Modification by Business Units

You can modify BUs to meet your specific leads requirements. For example, you can:

- Select which assignment rules to use for your leads, which lead assessment templates to use, and so on.
- Set BU attributes to be visible in the **Add Fields** UI when performing a search for leads.
- Hide BU attributes for single BU deployments in all transaction and search UIs.
- Hide BU attributes for multiple BU deployments for users who transact in one BU only.

### Related Topics

- [Multiple Business Units High-Level Setup Steps](#)
- [Example of a Set-Enabled Lookup](#)
- [Overview of Multiple Business Units in Opportunities](#)

## Set Leads Business Unit Properties

You can set several lead settings at the business unit (BU) level. When you set an option such as a rule or template at the BU level, the option setting is effective for only the BU that you indicate.

You set leads' BU-level options in the Specify Sales Business Function Properties page, in the Lead Settings section.

Here's how to specify business unit properties for leads:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Company Profile
  - o Task: Specify Sales Business Function Properties
2. If a BU isn't associated with the task, the application prompts you to select one. The Select Scope dialog box appears. In this dialog box:
  - a. Select the **Specify Sales Business Function Properties** option.
  - b. In the Business Unit list of values, click **Select and Add** and add the BU.
  - c. After you have selected the BU, click **Apply and Go to Task**.
3. In the Specify Sales Business Function Properties page, in the **Lead Settings** section, set these options:
  - o Lead Templates
  - o Lead Conversion Mapping
4. Save your changes.

## BU-Enabled Lead Profile Options

This table describes the lead template and copy map BU-enabled profile options and their default values, if any.

| Profile Option                       | Description                                                                                                                                                                           | Default Value |
|--------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| Qualification Assessment Template    | Specify the qualification template to use for evaluating and qualifying leads.                                                                                                        | None          |
| Direct Lead to Opportunity Copy Map  | Specify the mapping file name created in <b>Application Composer, Copy Maps</b> . This file is used to map objects and attributes when a direct lead is converted to an opportunity.  | None          |
| Partner Lead to Opportunity Copy Map | Specify the mapping file name created in <b>Application Composer, Copy Maps</b> . This file is used to map objects and attributes when a partner lead is converted to an opportunity. | None          |

### Related Topics

- [Set Opportunity Business Unit Properties](#)
- [Overview of Multiple Business Units in Leads](#)
- [How do I update existing setup data?](#)

## Add the Business Unit Field to Leads

After you modify the UI, salespeople can associate a business unit (BU) with their leads using a drop-down list in the Edit Lead page. You enable the drop-down list using Application Composer.

### Add the Business Unit Field

Here's how to add the Business Unit field to the Edit Lead page:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**.
3. Expand Standard Objects and navigate to **Sales Lead > Pages**. The Sales Leads: Pages page appears.
4. In the Sales Leads: Pages page, ensure that the **Application Pages** tab is active.
5. In the Details Page Layouts region, click the duplicate layout icon to duplicate and edit an existing layout.
6. In the Duplicate Layout dialog window, enter the new layout name and select the existing page layout to duplicate.
7. Click **Save and Edit**. Your new Details Layout page appears, with the name of the new layout in the page title.
8. In the Summary subtab region, click the edit icon.
9. In the Details Layout: Default custom layout: Edit Summary page, find the **Business Unit** field in the Configure Detail Form list. Move the field from the Available Fields list to the Selected Fields list.
10. Click **Save and Close**.
11. Click **Done** in the Details Layout: Default custom layout page.
12. Validate the change by navigating to the Edit Lead page and verify that you can see the Business Unit field.
13. Publish the sandbox.

The Business Unit field is now available to sales users in the edit lead pages.

#### Related Topics

- [Overview of Sandboxes](#)

## Map the Lead Business Unit for Territory Assignment

If you want to use business units in territory assignment, you must set up a mapping between the lead BU field and the territory dimension, Business Unit.

For example, you have a scenario where your organization:

- Has multiple business units with defined territories
- Wants to assign sales leads based on the business unit

In this example, let's say the lead is contained in BU1. In this case, set up the assignment mapping so that territory assignment only matches the BU1 territories (along with any matching dimensions). For example, matching dimensions might include geography, product, account type, sales channel and so forth.

### Set Up the Lead Business Unit Mapping

Here's how to set up the lead business unit mapping:

1. In the Setup and Maintenance work area, go to:



- Offering: Sales
  - Functional Area: Leads
  - Task: Manage Sales Lead Assignment Objects
2. On the Manage Sales Lead Assignment Objects page, locate and select **Sales Lead** in the **Name** column.
  3. In the **Sales Lead: Details** region, select the **Candidates** tab.
  4. Select the **Sales Lead Territory** candidate.
  5. Select the **Sales Lead Territory: Mapping Sets** tab.
  6. In the **Name** column, select from one of these active mapping sets for the sales lead object you want:
    - **Mapping Set 1**
    - **Mapping Set 2**
    - **Mapping Set 3**
    - **Mapping Set 4**
    - **Mapping Set 5**
  7. In the **Mapping Set: Mappings** region, locate and select the **BU** dimension function code.
  8. Deselect the **Inactive** check box to make the function code active.
  9. Repeat steps 2 through 4 for each sales lead Mapping Set.
  10. Click **Save and Publish**.
  11. Monitor and refresh the page to confirm the publish process has succeeded.

The sales lead assignment processing is now ready to use the active BU information when assigning territories.

#### Related Topics

- [Multiple Business Units High-Level Setup Steps](#)
- [How to Set Up Territory Dimensions](#)

## Multiple Business Units in Opportunities

### Overview of Multiple Business Units in Opportunities

Using multiple business units in opportunities lets users associate opportunities and related attributes with a specific business unit (BU) and then report on the data by BU.

#### Business Units and Opportunity Attributes

In addition to associating an opportunity itself with a BU, you can also associate several opportunity attributes with business units.

The following opportunity attributes are set-enabled and hence allow association with a business unit and with reference data sets. Reference data sets let objects share reference data across BUs. For example, you can choose to have opportunity the Win/Loss Reason lookup type shared across BUs, or you can choose to have each BU manage its own. You can also assign a reference data set to reference data objects, such as sales methods.

- Opportunity lookup types:

- Win/Loss Reason (MOO\_SETID\_WIN\_LOSS\_REASON)
  - Strategic Value (MOO\_SETID\_STRATEGIC\_VALUE)
  - Opportunity Assessment Override Reason (MOO\_SETID\_ASSESS\_OVERRIDE\_RSN)
  - Decision Level (MOO\_SETID\_DECISION\_LEVEL)
  - Estimated Deal Duration (MOO\_SETID\_DEAL\_HORIZION)
  - Level of Risk (MOO\_SETID\_RISK\_LEVEL)
  - Sales Revenue Category (MOO\_SETID\_REVN\_CATEGORY)
  - Sales Revenue Type (MOO\_SETID\_REVENUE\_TYPE)
- Sales methods
  - Sales statuses

When you enable set-ID lookup types, you must assign them to a business unit in the Manage Set Enabled Lookups page in the Setup and Maintenance work area. To find this page, do the following:

1. Sign in as a setup user or sales administrator.
2. In Setup and Maintenance, go to the following:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Set Enabled Lookups

For an example of using a set-enabled lookup, see *Example of a Set-Enabled Lookup*

For more information about reference data sets, see *How Business Units Work with Reference Data Sets*

You can set several opportunity profile options at the business unit level, and you can specify the default sales method for a business unit. For more information, see *Specify Sales Business Function Properties*.

## Set Opportunity Business Unit Properties

You can set several opportunity profile options, including the one for default sales method, at the business unit (BU) level. When you set a profile option at the BU level, the profile option setting is effective for only the BU that you indicate.

Here's how to specify business unit properties for opportunities:

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Company Profile
  - Task: Specify Sales Business Function Properties
2. If a BU isn't associated with the task, the application prompts you to select one. The Select Scope dialog box appears. In this dialog box:
  - a. Select the **Specify Sales Business Function Properties** option.
  - b. In the Business Unit list of values, click **Select and Add** and add the BU.

- c. After you add the BU, click **Apply and Go to Task**.
3. In the Specify Sales Business Function Properties page, set the profile options that you want as outlined in the BU-Enabled Profile Options section.
4. Save your changes.

## BU-Enabled Profile Options

This table outlines the opportunity BU-enabled profile options.

| Profile Option                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Default Value          |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------|
| Sales Method                              | Determines the default sales method the application picks when an opportunity is first created.                                                                                                                                                                                                                                                                                                                                                                                                                                      | Standard Sales Process |
| Require Win/Loss Reason                   | 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.                                                                                                                                                                                                                                                                                                                                                                           | Yes                    |
| Require Competitor                        | Determines whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels.                                                                                                                                                                                                                                                                                                                                                                                | Yes                    |
| Territory Based Resource Assignment Style | <p>Determines if all members of the territory should be added to an opportunity team or just the owner. Or, if all (owner and members of the territory) should be excluded from the opportunity team.</p> <p><b>Note:</b><br/>When you set a profile option at the BU level, the profile option setting takes precedence for the BU. However, the <b>Lock Assignment</b> check box, if selected, takes precedence and prevents a salesperson from being automatically removed from an opportunity through the assignment engine.</p> | All                    |

### Related Topics

- [Set the Default Sales Method Profile Option](#)
- [Set the Close Opportunity Profile Options](#)
- [How do I update existing setup data?](#)

## Add the Business Unit Field to Opportunities

If you want sales teams to be able to associate a business unit with an opportunity, enable the Business Unit list of values in the opportunities UI.

### Add the Business Unit Field

After you use Application Composer to add the Business Unit field to the opportunities UI, all available business units display in a drop-down list in the Business Unit field.

1. Create and activate a sandbox to work in.
2. Navigate to **Application Composer**.
3. Expand Standard Objects and navigate to **Opportunity > Pages**. The Opportunity: Pages page appears.
4. In the Opportunity: Pages page, ensure that the **Application Pages** tab is active.
5. In the Details Page Layouts region, select the **Standard Layout** in the table and then click the **Duplicate** icon. The Duplicate Layout dialog box appears.

Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.

6. Enter a name for the new layout and click **Save and Edit**.
7. In the Summary subtab region, click the edit icon.
8. In the Details Layout: Default Layout: Edit Summary page, find the **Business Unit** field in the Configure Detail Form list. Move the field from the Available Fields list to the Selected Fields list.
9. Click **Save and Close**.
10. Click **Done** in the Details Layout: Default Layout page.
11. Validate the change by navigating to the edit opportunity page and ensuring that you can see the Business Unit field in the edit opportunity page.

The user you sign in with to validate the change must belong to a sales resource organization. For example, you must sign in as a sales representative.

12. Publish the sandbox.
13. The Business Unit field is now available to sales users in the edit opportunity application pages.

#### Related Topics

- [Overview of Sandboxes](#)

## Enable Opportunity Territory Assignment by Business Unit

You can configure the application to assign opportunities based on the BU.

To use BU in territory assignment, you must activate the assignment mapping between the opportunity revenue BU field and the territory dimension, Business Unit.

For example, you have a scenario where your organization:

- Has multiple BUs, with defined territories
- Wants to assign opportunities based on the BU

In this example, let's say the lead is contained in BU1. In this case, set up the assignment mapping so that territory assignment only matches the BU1 territories (along with any matching dimensions). Matching dimensions might include geography, product, account type, and sales channel.

## Set Up the Opportunity Revenue Business Unit Mapping

Here's how to set up the opportunity revenue BU mapping:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Sales Assignment Manager Objects
2. In the **Name** column of the Manage Sales Assignment Manager Objects page, locate and select **Revenue**.
3. In the **Revenue: Details** region, select the **Candidates** tab.
4. Select the **Territory** candidate.
5. Select the **Territory: Mapping Sets** tab.
6. In the **Name** column, select **Sales Account Mapping Set**.
7. In the **Sales Account Mapping Set: Mappings** region, locate and select the **BU** dimension function code.
8. Click the edit icon on the table to go into edit mode.  
The Edit Mapping window appears.
9. Deselect the **Inactive** check box to make the function code active. Click **OK**.
10. Click **Save and Publish**.
11. Monitor and refresh the page to confirm the publish process has succeeded.

The opportunity assignment processing is now ready to use the BU information when assigning territories.

### Related Topics

- [Multiple Business Units High-Level Setup Steps](#)
- [How to Set Up Territory Dimensions](#)
- [Considerations for Setting Up Opportunity Revenue](#)

## Change the Business Unit for a Subset of Opportunities

Salespeople can update the business unit on an opportunity. They can also update the set-enabled lookup values on the opportunity and revenue lines.

Read this topic to learn how to add new specific or common set values for sales methods and stages. Learn how to enable or disable existing lookup values for:

- Set-enabled lookups for these opportunity tasks:
  - o Manage Levels of Risk
  - o Manage Strategic Values
  - o Manage Decision Levels
  - o Manage Deal Horizons

- Manage Win/Loss Reasons
- Manage Opportunity Revenue Types
- Sales Status lookup values
- Specific Sales Method and Sales Stage for the Sales Method

You set lookup values from the relevant tasks available from the Define Opportunity Management Lookups page. This page is accessible from the Sales offering work area.

## Modify BU Setup for Opportunities

Here's how to create specific values or enable or disable existing lookup values for opportunities. You also set up the sales status, sales method, and sales stage before you select your business unit to apply the changes.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Define Opportunity Management Lookups
2. On the Define Opportunity Management Lookups page, select the opportunity task that you want.
3. Add a new set-enabled lookup value or either enable or disable an existing lookup value.
4. After the setup is done for the task lookups, navigate to the Setup and Maintenance work area and go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Sales Status
5. In the **Sales Statuses** section of the Manage Sales Statuses page, add a new sales status or select or deselect **Active** for an existing sales status.
6. Next, go to the **Manage Sales Methods and Sales Stages** task.
7. Add a new sales method and sales stage for the sales method that you want.
8. After you complete the setup related to lookups, sales statuses, sales methods, and sales stages, navigate to the **Define Business Units** task.
9. Click the **Manage Business Unit Set Assignment** task.
10. In the Reference Data Set Code column, for each object, set the business unit.
11. Click **Save and Close**.

Repeat step these steps for each new individual business unit you have added.

### Related Topics

- [How do I update existing setup data?](#)

## Migrate Lead and Opportunity BU Data

There might be times when you need to move all leads or opportunities from one business unit to another.

For example, you could have a new business unit taking over all opportunities from another business unit. All opportunities would have to be updated from the old business unit to the new business unit. The migration is easy to do by running the Migrate Lead and Opportunity Business Unit Data scheduled process.

1. Navigate to **Tools > Scheduled Processes**.

Alternatively, run the process from the **Migrate Lead and Opportunity Business Unit Data** task in Setup and Maintenance.

2. Click **Schedule New Process**.
3. Search for the **Migrate Lead and Opportunity Business Unit Data** process.

**Tip:** You may need to search for the process in the search and select window available by clicking the **Search** link at the bottom of the Name list on the main search window.

4. Select your options:
  - **Business Object:** Opportunity or Lead
  - **From Business Unit:** Business unit that you want to migrate data from
  - **To Business Unit:** Business unit that you want to migrate data to
5. Submit the process.

#### Related Topics

- [What are scheduled processes?](#)

## Additional Implementation Concepts

### Reference Data Sets

Reference data sets are logical groups of reference data that various transactional entities can use depending on the business context. You can get started using either the common reference data set or the enterprise set depending on your implementation requirement.

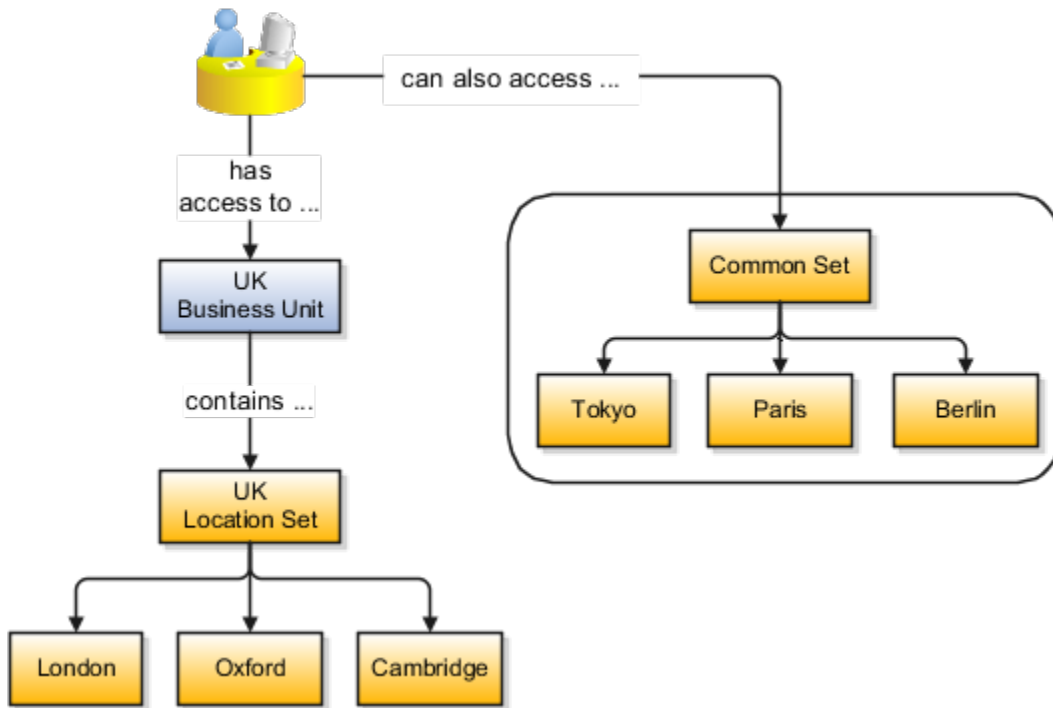
You can also create and maintain additional reference data sets, while continuing to use the common reference data set. Consider the following scenario. Your enterprise can decide that only some aspects of corporate policy should affect all business units. The remaining aspects are at the discretion of the business unit manager to implement. This enables your enterprise to balance autonomy and control for each business unit.

For example, your enterprise holds business unit managers accountable for their profit and loss, but manages working capital requirements at a corporate level. Then, you can let managers define their own sales methods, but define payment terms centrally. As a result, each business unit has its own reference data set for sales methods and one central reference data set for payment terms assigned to all business units.

### Partitioning

Partitioning reference data and creating data sets provide you the flexibility to handle the reference data to fulfill your business requirements. You can share modular information and data processing options among business units with ease. You can create separate sets and subsets for each business unit. Alternatively, you can create common sets or subsets to enable sharing reference data between several business units, without duplicating the reference data.

The following figure illustrates the reference data sharing method. The user can access the data assigned to a specific set in a particular business unit, as well as access the data assigned to the common set.



#### Related Topics

- [Assignment of Reference Data Sets to Reference Objects](#)
- [Reference Data Sets and Sharing Methods](#)

## How Business Units Work with Reference Data Sets

Reference data sharing enables you to group set-enabled reference data such as jobs or grades to share the data across different parts of the organization.

Sets also enable you to filter reference data at the transaction level so that only data assigned to certain sets is available to be selected. To filter reference data, Oracle Fusion Human Capital Management (HCM), applications use the business unit on the transaction. To set up reference data sharing in Oracle Fusion HCM, you create business units and sets, and then assign the sets to the business units.

### Common Set Versus Specific Sets

Some reference data in your organization may be considered global, and should therefore be made available for use within the entire enterprise. You can assign this type of data to the Common Set, which is a predefined set. Regardless of the business unit on a transaction, reference data assigned to the Common Set is always available, in addition to the reference data assigned to the set that corresponds to the business unit on the transaction.

Other types of reference data can be specific to certain business units, so you can restrict the use of the data to those business units. In this case, you can create sets specifically for this type of data, and assign the sets to the business units.



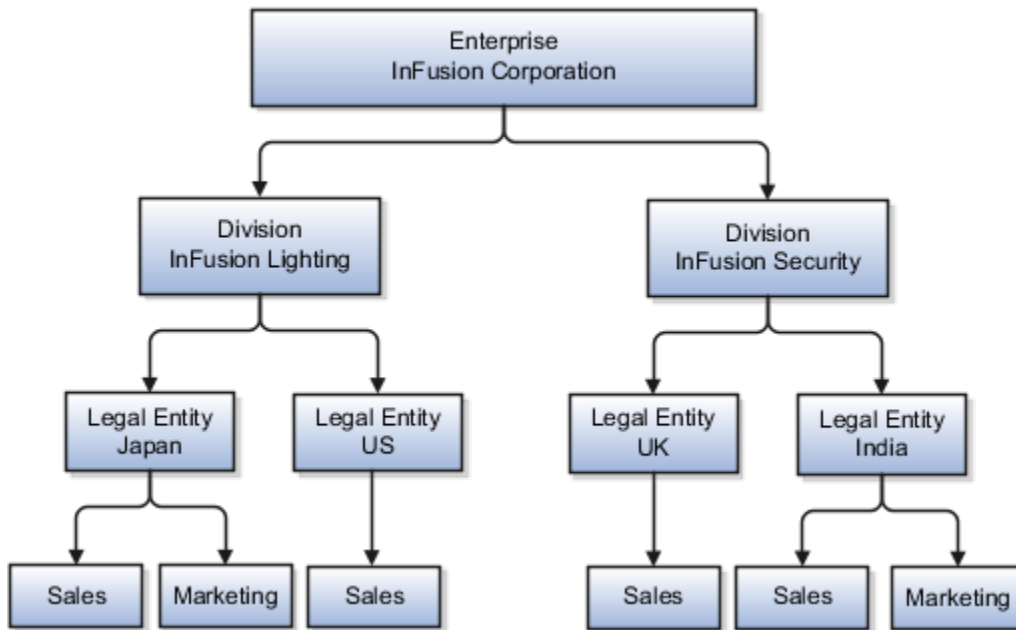
## Business Unit Set Assignment

When you assign reference data sets to business units, you assign a default reference data set to use for all reference data types for that business unit. You can override the set assignment for one or more data types.

### Example: Assigning Sets to Business Units

InFusion Corporation has two divisions: Lighting and Security, and the divisions each have two locations. Each location has one or more business functions.

The following figure illustrates the structure of InFusion Corporation.



When deciding how to create business units, InFusion decides to create them using the country and business function level. Therefore, they created the following business units:

- Sales\_Japan
- Marketing\_Japan
- Sales\_US
- Sales\_UK
- Marketing\_India
- Sales\_India

Because locations, departments, and grades are specific to each business unit, InFusion does not want to share these types of reference data across business units. They create a reference data set for each business unit so that data of those types can be set up separately. Because the jobs in the Sales business function are the same across many locations, InFusion decides to create one additional set called Jobs. They override the set assignment for the Jobs reference data group and assign it to the Jobs set. Based on these requirements, they create the following sets:

- Sales\_Japan\_Set
- Mktg\_Japan\_Set
- Sales\_US\_Set

- Sales\_UK\_Set
- Mktg\_India\_Set
- Sales\_India\_Set
- Grades\_Set

The following table describes the default set assignment and the set assignment overrides for each business unit in InFusion:

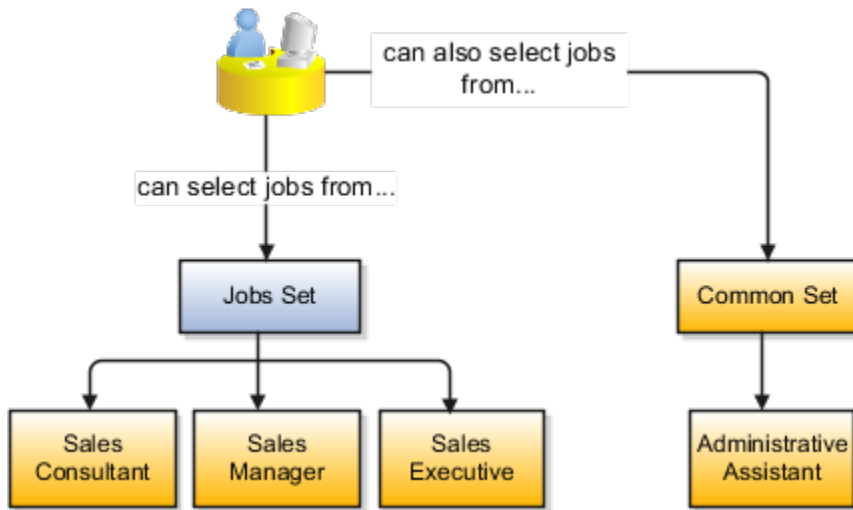
| Business Unit   | Default Set Assignment                                 | Set Assignment Overrides |
|-----------------|--------------------------------------------------------|--------------------------|
| Sales_Japan     | Sales_Japan_Set for grades, departments, and locations | Jobs set for jobs        |
| Marketing_Japan | Mktg_Japan_Set for grades, departments, and locations  | None                     |
| Sales_US        | Sales_US_Set for grades, departments, and locations    | Jobs set for jobs        |
| Sales_UK        | Sales_UK_Set for grades, departments, and locations    | Jobs set for jobs        |
| Marketing_India | Mktg_India_Set for grades, departments, and locations  | None                     |
| Sales_India     | Sales_India_Set for grades, departments, and locations | Jobs set for jobs        |

When setting up grades, departments, and locations for the business units, InFusion assigns the data to the default set for each business unit. When setting up jobs, they assign the Jobs set and assign the Common Set to any jobs that may be used throughout the entire organization.

When using grades, departments, and locations at the transaction level, users can select data from the set that corresponds to the business unit they enter on the transaction, and any data assigned to the Common Set. For example, for transactions for the Marketing\_Japan business unit, grades, locations, and departments from the Mktg\_Japan\_Set is available to select, as well as from the Common Set.

When using jobs at the transaction level, users can select jobs from the Jobs set and from the Common Set when they enter a sales business unit on the transaction. For example, when a manager hires an employee for the Sales\_India business unit, the list of jobs is filtered to show jobs from the Jobs and Common sets.

The following figure illustrates what sets of jobs can be accessed when a manager creates an assignment for a worker.



## Assignment of Reference Data Sets to Reference Objects

You can assign the reference data sets to reference objects using the Manage Reference Data Set Assignments page. For multiple assignments, you can classify different types of reference data sets into groups and assign them to the reference entity objects.

The assignment takes into consideration the determinant type, determinant, and reference group, if any.

### Determinant Types

The partitioned reference data is shared using a business context setting called the determinant type. A determinant type is the point of reference used in the data assignment process. The following table lists the determinant types used in the reference data assignment.

| Determinant Type   | Description                                                                                                              |
|--------------------|--------------------------------------------------------------------------------------------------------------------------|
| Asset Book         | Information about the acquisition, depreciation, and retirement of an asset that belongs to a ledger or a business unit. |
| Business Unit      | The departments or organizations within an enterprise.                                                                   |
| Cost Organization  | The organization used for cost accounting and reporting on various inventory and cost centers within an enterprise.      |
| Project Unit       | A logical organization within an enterprise that's responsible for enforcing consistent project management practices.    |
| Reference Data Set | References to other shared reference data sets.                                                                          |

## Determinant

The determinant (also called determinant value) is a value that corresponds to the selected determinant type. The determinant is one of the criteria for selecting the appropriate reference data set.

## Reference Groups

A transactional entity may have multiple reference entities (generally considered to be setup data). However, all reference entities are treated alike because of similarity in implementing business policies and legal rules. Such reference entities in your application are grouped into logical units called reference groups. For example, all tables and views that define Sales Order Type details might be a part of the same reference group. Reference groups are predefined in the reference groups table.

## Example of a Set-Enabled Lookup

Creating a new set-enabled lookup is similar to creating a standard lookup with the addition of specifying a reference data set determinant for the lookup codes.

The reference data set for a set-enabled lookup code is part of its foreign key. This is unlike other set-enabled entities. Use the Manage Set Assignments task to define and manage reference data set assignments. Note that you can create or edit lookup codes only if the configuration level for that lookup type supports it.

## Selecting a Reference Group for a Set-Enabled Lookup Type

Specify a reference group for a set-enabled lookup type to indicate which reference data set assignments are available for its lookup codes. For example a COLORS lookup type might be set-enabled for a Countries reference group that includes the US and EU reference data set assignments.

## Selecting a Reference Data Set for a Set-Enabled Lookup

The reference data set determines which lookup code is included in the list of values. For example, there are two references data sets - one for the US and the other for EU. If a COLORS lookup type contains RED, YELLOW, ORANGE, and GREEN lookup codes, you can enable one RED lookup code from the US reference data set and another RED lookup from the EU reference data, each lookup code having different meanings.

The following table elaborates the example, how these two reference data sets (US and EU) contain one lookup code that's common, but each differing in its lookup meaning.

| Reference Data Set | Lookup Code | Lookup Meaning |
|--------------------|-------------|----------------|
| US                 | RED         | Red            |
| US                 | YELLOW      | Yellow         |
| US                 | GREEN       | Green          |
| EU                 | RED         | Rouge          |
| EU                 | ORANGE      | Orange         |

| Reference Data Set | Lookup Code | Lookup Meaning |
|--------------------|-------------|----------------|
|                    |             |                |

Some lookup codes may be unique to one or another reference data set as the ORANGE lookup is to the EU reference data set in the example.

In another example in the following table, a lookup type called HOLD\_REASON provides a list of reasons for putting a contract renewal on hold. Reference data sets determine which codes are included in the Hold Reason list of values.

| Reference Data Set | Lookup Code | Lookup Meaning                                        |
|--------------------|-------------|-------------------------------------------------------|
| US                 | SEC         | SEC Compliance Review                                 |
| US                 | DIR         | Needs Director's Approval                             |
| US                 | VP          | Needs Vice President's Approval                       |
| CHINA              | CSRC        | Pending China Securities Regulatory Commission Review |
| CHINA              | PR          | Needs President's Approval                            |
| COMMON             | REQUESTED   | Customer Request                                      |

Referring to the example in the table, when end-users place a contract on hold in the US business unit, the three reason codes in the US set are available. When placing a contract on hold in the China business unit, the two codes in the China set are available.

#### Related Topics

- [Example of a Standard Lookup](#)

## Define Default Reference Data Sets

Assign a default reference data set to a new business unit. This default set will then be assigned to all the reference data objects for the business unit, such as payables payment terms, and receivables accounting rules.

To assign the default set, select an existing reference data set or create a new one.

### Creating Default Reference Data Sets for a Business Unit

Use the Create Business Unit or the Edit Business Units pages to create a reference data set.

The creation of the reference data set for an existing business unit will not impact the actual sets previously assigned to the business unit. If you want to use the newly created set for your existing business unit use the Manage Set Assignments task, and assign the set to each reference data object you want to change.

**Note:** You must use the Manage Set Assignments task to assign the set to each specific reference data object that you want to change. In order to activate the set assignments, you must save the record, even if you have not made any updates.

*Related Topics*

- [Reference Data Sets](#)

## How You Create Reference Data Sets in the Enterprise Structures Configurator

If you created business units automatically, then the Enterprise Structures Configurator automatically creates reference data sets for you. The Enterprise Structures Configurator creates one reference data set for each business unit.

You can add additional sets, but you cannot delete any of the sets that were created automatically. The Enterprise Structures Configurator creates one reference data set for each business unit. You can add additional sets, but you cannot delete any of the sets that were created automatically. A standard set called the Enterprise set is predefined.

### Common Set

The Common set is a predefined set that enables you to share reference data across business units. When you select set-enabled data at the transaction level, the list of values includes data in the:

- Common set
- Set associated with the data type for the business unit on the transaction

For example, when you create an assignment, the list of values for grades includes grade in the:

- Common set
- Set that is assigned to grades for the business unit in which you creating the assignment

# 9 Territories

## Overview of Territory Management Features

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

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

**Note:** If your salespeople forecast only the opportunities they own and you don't need to assign accounts, leads, or opportunities to them automatically by address or other criteria, then you can skip implementing territories per this chapter. Everything you need is in the Forecasting chapter, including a brief territory setup. A process sets up a territory structure that mirrors your sales organization hierarchy. Opportunities are assigned to the opportunity owner's territory. The opportunity revenue gets included in the owner's forecast and passed up the management chain for adjustment and approval.

## Summary of Features

Territory Management includes these key features:

- Use territories as the basis for forecasting, quota distribution, compensation, and analysis of sales performance. Forecasts roll up according to the territory hierarchy.
- Use territories to assign resources and secure access to accounts, contacts, households, partners, leads, and opportunities.
- Assign channel sales managers to partners and partner transactions within their territories.
- Define territories by logical boundaries called dimensions. Examples of these include address, industry, product, customer size, sales channel, and organization type.
- Define territories by selecting a list of specific accounts, contacts, households, or partners.
- Model territory realignments and perform what-if analyses to find optimal territory changes.
- Analyze metrics to understand the results of changes to the boundaries of each territory or to understand the ongoing performance of active territories.

## Territory Concepts

### Territory Benefits

Territories are foundation components that enable many key Sales Force Automation processes. These key capabilities can improve the overall performance of your sales organization.

- Model your sales organization hierarchy
- Assign the most effective resources to your accounts and opportunities
- Provide shared data visibility to encourage collaboration and team cross-selling
- Optimize sales coverage and maximize revenue with balanced territories
- Reduce territory administration costs and errors

## How You Model Your Sales Organization

One of the most critical aspects of your implementation is the definition of the sales organization hierarchy and the assignment of your sales resources within this structure.

This structure represents how your sales force is organized internally and should be aligned with your sales strategy and how you sell in your marketplace. This structure drives data visibility for your sales users, rolls up the sales forecast, and aggregates data to measure performance at each level within your sales organization.

- A territory can represent the responsibility of a salesperson such as a set of customers
- A territory can represent the responsibility of a sales manager or executive such as a geographic region, line of business, product line, customer segment, or sales channel
- A territory can represent the responsibility of a channel account manager, including a specific set of partners and their respective sales activities
- A territory can represent a branch or a sales office responsible for selling to customers in a specific geographic region
- A territory can represent the jurisdiction of a channel partner such as authorizing the partner to sell a specific set of products to a set of customers

You organize territories in a hierarchy. While there is one single global territory structure for your entire enterprise, each branch of the overall structure represents a different part of the sales organization. The hierarchical relationship between territories at different levels defines how the data aggregation and visibility are rolled up.

Each territory is associated with one or more sales resources for that territory. Each resource on the territory team may have a designated function based on the role that team member has in the context of that territory. A resource may be assigned to multiple territories with the same or different roles.

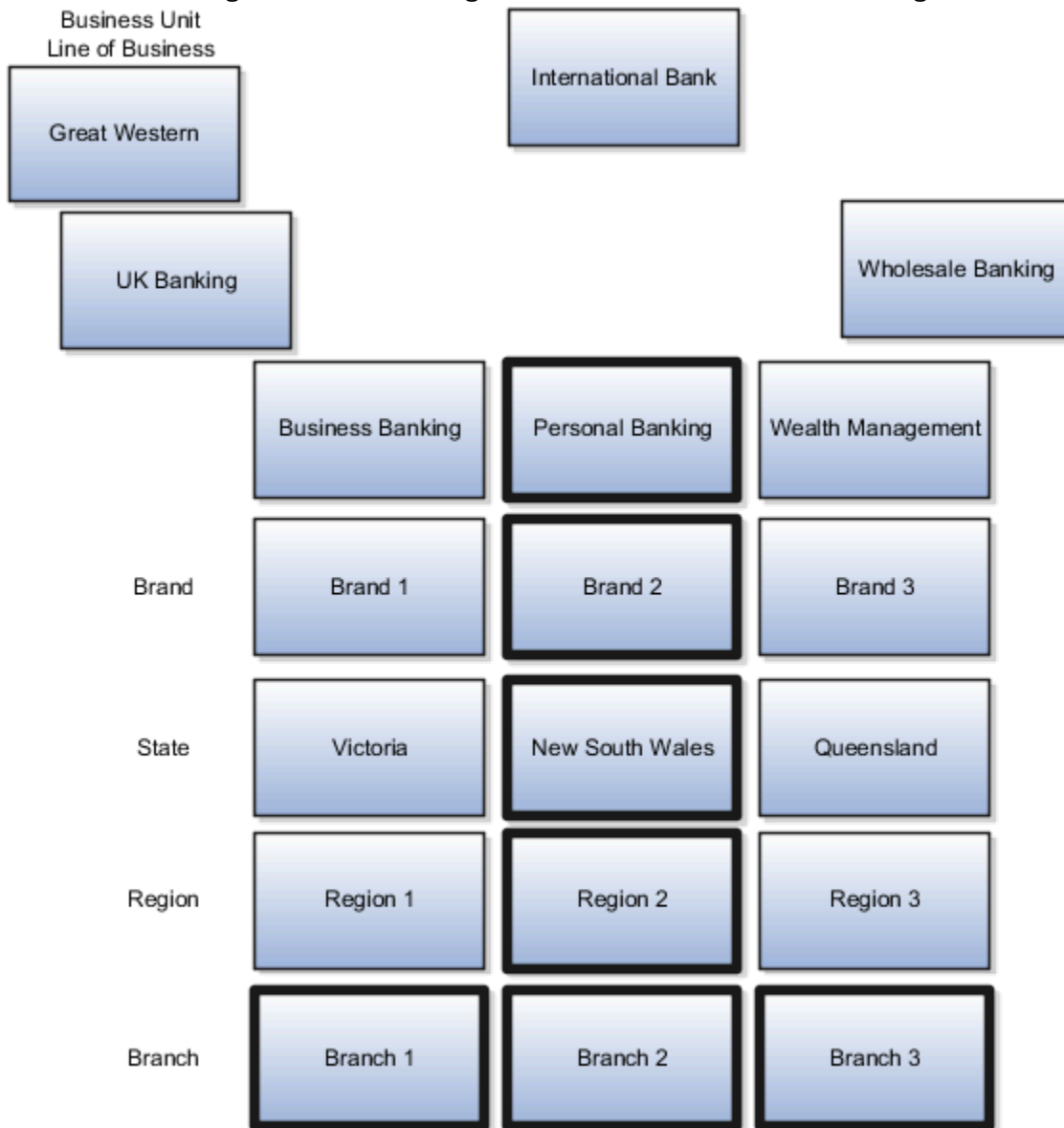
### Financial Company Example

Depending on your specific industry and business model, a territory can be used to model any part of your sales organization. These examples illustrate different scenarios:

In this example, the International Bank has six lines of business which are business units: Great Western UK Banking, Business Banking, Personal Banking, Wealth Management, Wholesale Banking. This figure highlights the Personal Banking business unit and territory coverage: The Brand dimension is Brand 2. The State dimension is New

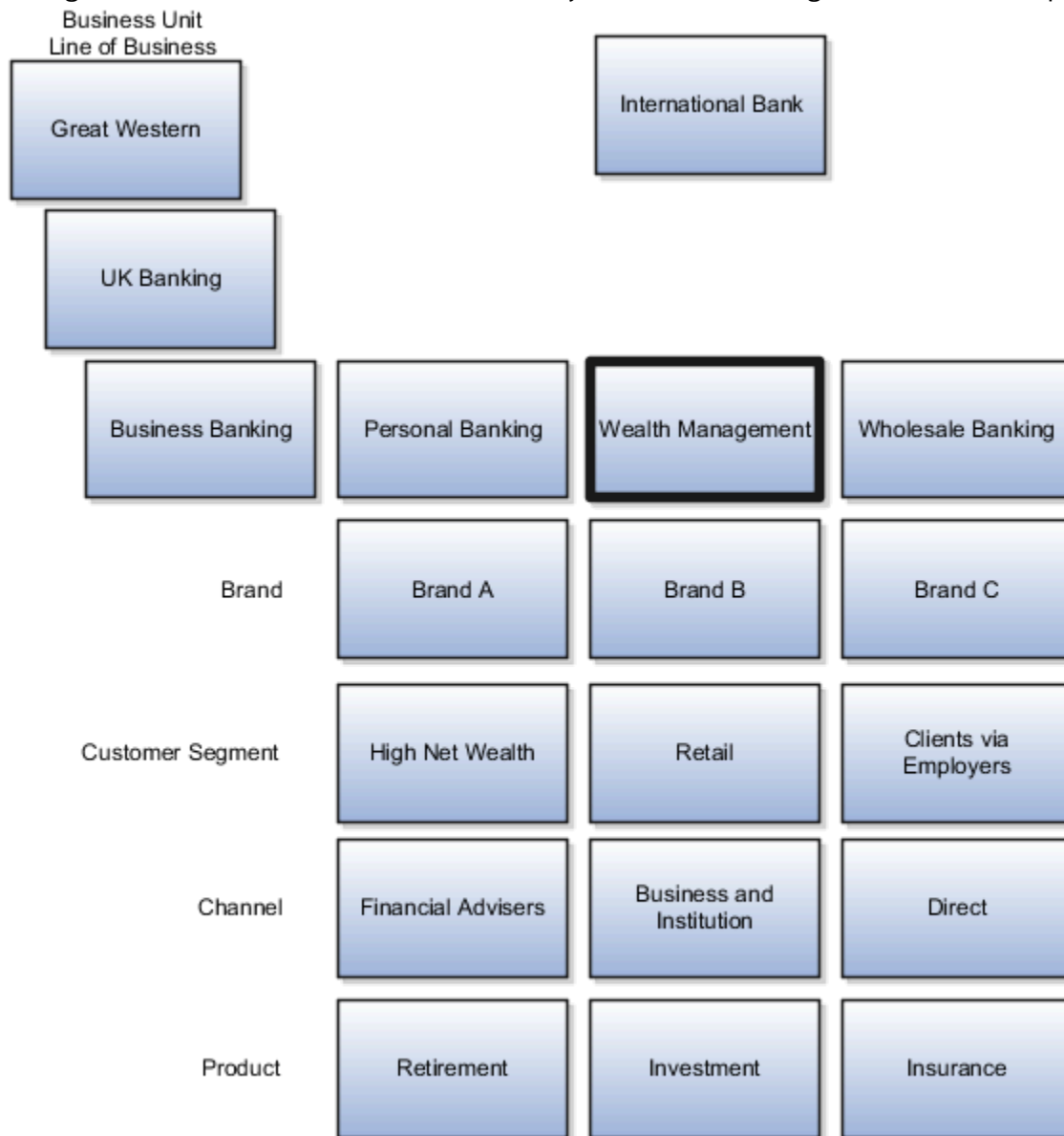


South Wales. The Region dimension is Region 2. The Branch dimension within Region 2 contains three branches.



The overall structure shows different lines of business. Within the Personal Banking line of business, territories are further broken down by brand, geography (state, and then region), and branch. Using this same example, the Wealth Management line of business is organized differently. The Wealth

Management line of business defines territories by brand, customer segment, channel, and product.



## Automated Territory Assignment

Instead of manually choosing an owner for each account, lead, or opportunity line, you can use territories to automatically assign objects to the territory teams. Territories are assigned to objects by matching territory coverage with the attribute values of the object.

## Territory Coverage

Territory coverage defines the boundary of each territory and describes the business rules by which assignments are made. You have three types of coverage:

- Dimensional Coverage

This is a combination of dimensions with a list of values for each dimension. A territory dimension is mapped to an attribute on transactional objects during assignment processing. For example, the address dimension on the territory is mapped to the address of the account or the partner. The following standard dimensions are provided: address, product, industry, account type, organization type, customer size, and sales channel. Three additional dimensions are provided for you to configure with customer attributes.

- Inclusion Coverage

This identifies a list of accounts, contacts, households, or partners to be included.

- Exclusion Coverage

This identifies a list of accounts, contacts, households, or partners to be excluded.

You can define territories using a combination of different coverage definitions, thus giving your organization the power to model complex territories. Here are some examples:

- Steve is a key account director who covers three enterprise accounts, namely ACME Inc, Vision Corporation, and Pinnacle Technologies.

You define Steve's territory with inclusion coverage of three accounts: ACME Inc, Vision Corporation, and Pinnacle Technologies.

- Amanda is a territory field salesperson who covers all the high tech accounts in Northern California. In addition, ABC Technologies, located in southern California, was also assigned to Amanda because she has a prior relationship with the CFO.

You define Amanda's territory using a dimensional coverage with two dimensions (`Address = Northern California`, `Industry = High Tech`) and an inclusion coverage with one account, ABC Technologies.

## Territory Assignment Execution

You can configure when territories are assigned to transactional objects and the frequency the assignment process should be executed. Territories can be assigned in real time as new transactions are created or when existing transactions are updated. You can also configure territory assignment to be run as a background process to assign transactions in batch. This is the recommended approach if you have a large volume of transactions.

During assignment execution, transactional attribute values are matched against territory coverage and all matching territories are assigned to the object. As an example, on a given opportunity, you can assign multiple territories composed of the sales team: the account representative, the industry overlay, a product specialist, the channel partner, and the channel account manager. This enables you to assemble the most effective sales team for each opportunity and to maximize your chances for closing the deal.

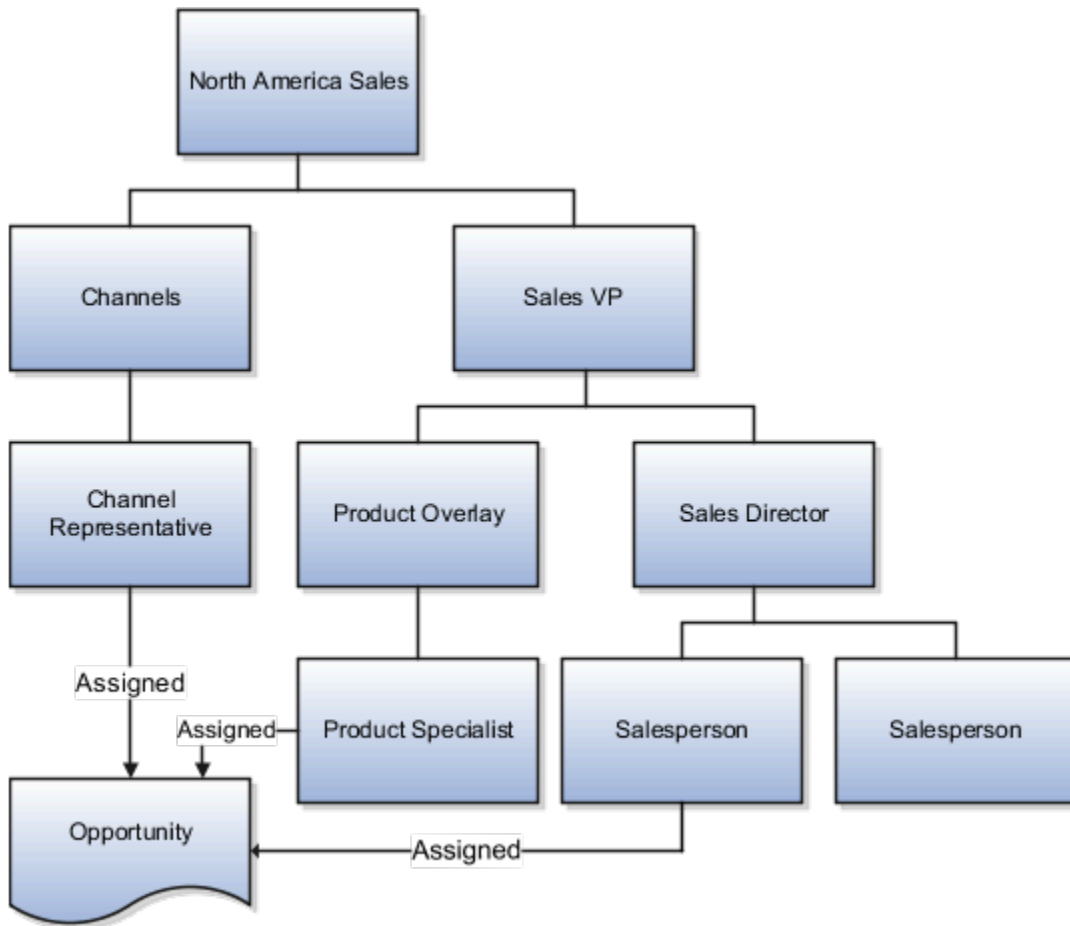
## Territory-Driven Visibility

After territories are assigned to transactional objects, territory team members gain visibility into these objects through the territory hierarchy.

In this figure, a salesperson Dave Smith has access to the account because his territory is directly assigned to the account record. His regional manager and sales director also gain access to the same account because their territories are ancestors of Dave's territory. By contrast, Regional Manager 2 doesn't have access to the account because her territory isn't a direct ancestor of Dave's territory.



Combining flexible assignment rules and territory-driven visibility, you gain precise control over data visibility and data sharing policies. For large enterprise sales organizations with complex sales teams such as the following example, shared visibility on customer and opportunity data can further facilitate collaboration and team cross-selling. This figure shows the North America Sales team that includes channels and a sales VP. The sales VP has a Sales Director managing salespeople, and a Product Overlay group with a product specialist. The Channels division includes channel representatives. An opportunity is assigned to a channel representative, a product specialist, and a salesperson.



## Territory Administration

For many sales organizations, territory administration is a task that's performed on a daily basis to account for attrition or turnover of the sales force.

In addition, major territory realignment resulting from sales reorganization or mergers and acquisitions can often take weeks, if not months, to implement. Using an intuitive user interface and bulk update capabilities, you can quickly and efficiently manage territory changes on an ongoing basis. This significantly reduces operational costs and increases business agility.

### Delegated Administration

For large enterprise companies, the responsibility of territory administration is commonly decentralized by lines of business, divisions, or regions. This can be easily accomplished by adding the regional administrator to the territory team of the top-level territory corresponding to the scope of delegation. For example, if you add an administrator to the territory team of the top-level territory for North America Sales, then she can administer all the descendant territories under North America Sales. However, this administrator has no access to other territories, such as those in the European region.

## Sales Features Supported by Territories

You use territories to support other areas in sales.

- Forecasting

Sales Forecasting depends on having territories assigned to product items in opportunities. The forecast is then submitted and rolled up the management chain using the territory hierarchy.

- Quota Allocation

You can distribute top-down quotas throughout your sales organization using the territory hierarchy. Use territory coverage and metrics to calculate quotas for sales resources based on current territory potential or past performance. This helps set more realistic and achievable quotas.

- Intelligent Product Picker

The product list in opportunities or leads automatically applies filters to only show those products that are defined in the coverage of the salesperson's territory.

- Business Intelligence

Use the territory hierarchy and territory team in reporting and analytics. The territory hierarchy can be a dimension to aggregate data in building reports and key performance indicators.

## Territory Implementation

### Steps to Implement Territories

When you set up territories, these are the overall steps you follow.:

1. Plan how you want to define the boundaries of your territories. Which dimensions do you need to define the coverage?
2. Prepare the data you need to define your territory coverage. If you plan to assign accounts directly to each territory, then you need customer data. A dimension requires data (for example, geography) before you enable it.
3. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Territories
4. Use the Define Default Proposal Owner task to set this profile option.
5. Start the Enable Dimensions and Metrics task.
6. Click **Edit** to make changes to existing settings.
7. In the Dimensions region, click **Select and Add** to add and enable dimensions.

8. In the Additional Options region, you can choose to enable Territory Precedence.  
Included accounts have priority over dimension coverage when assigning accounts to territories with the same function name. If you don't assign functions to territories, then included accounts have priority over all other territories. Enabling this option disables metrics, assignment preview, and territory validations.
9. Enable metrics that you want to see when comparing territory proposals.
10. Run Load and Activate to activate all of your settings and perform any data loading required according to your choices.
11. If you enable Territory Precedence and you want to assign function names to territories, then enter values for the Territory Function ORA\_MOT\_TERRITORY\_FUNCTION lookup type.
12. Use the Run Territory Proposal Activation task to schedule background processes.
13. Create your hierarchy of territories.

## Set the Territory Proposal Profile Option

The application generates territory proposals, for example when processing territory inheritance. Every proposal must have an owner. You must provide an owner for generated territory proposals.

1. In the Setup and Maintenance work area, go to the Manage Administrator Profile Values task:
  - Offering: Sales
  - Functional Area: Sales Foundation
2. Search for the profile option MOT\_DEFAULT\_RESOURCE, Proposal Owner Default.
3. Select a resource to be the default owner.
4. Save and close.

## Schedule Territory Processes

You can make changes to many territories at one time using a territory proposal. If you schedule proposals to become active on certain dates, then you must schedule a background process to run periodically to perform the activation.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Territories
  - Task: Run Territory Proposal Activation
2. To run the process immediately, click **Submit**.
3. Schedule the Run Territory Proposal Activation process. Click **Advanced**.
4. Select **Run Using a Schedule**.
5. For Frequency, select **Daily**.
6. Select start and end dates and times.
7. Go to the Notification tab.
8. Click **Create Notification**.
9. Enter the email for the person who should receive notifications.
10. In the **Condition** field, you should select **On Warning** and **On Error** as a minimum.
11. Click **Submit**.

## Expose the Exclusions Tab and the Enable Forecasting Field

You can modify the Territory Details UI to add the Exclusions tab and to add the Enable Forecasting field to the Summary tab. These changes affect the Less Details UI where sales managers can modify active territories without using a territory proposal.

To add the Exclusions tab to the Territory Details page:

1. Ensure you're working in an active sandbox.
2. From the Navigator, open Application Composer.
3. Select the CRM Cloud application.
4. In Standard Objects, expand Sales Territory.
5. Select **Pages**.
6. In the Application Pages tab, Details Page Layouts region, select **Standard Layout**.
7. Click **Duplicate**.
8. Accept the provided name **Default custom layout**.
9. Save and close.
10. Click the link to open your new layout.
11. In the Subtabs region, click the **Hide, Show, or Reorder Subtabs** icon.
12. In the Configure Subtabs dialog, move **Exclusions** from the Available Subtabs list to the Selected Subtabs list.
13. Click **OK**.
14. Click **Done**.

To enable the Enable Forecasting field:

1. Ensure you're working in an active sandbox.
2. Open your Default custom layout for the Details Layout.
3. Click the Summary tab.
4. Click the **Edit** icon beside the Summary heading.
5. Move the **Enable Forecasting** field from the Available Fields list to the Selected Fields list.
6. Save and close.

After you complete these procedures, test the changes and publish the sandbox according to your company's business practices.

## Define the Territories UI

You can determine which UI you see when you first open Territories.

### Define the Landing Page

You set profile options to define whether the landing page for territories is the More Details UI or the Less Details UI.

1. In the Setup and Maintenance work area, go to the Manage Administrator Profile Values task:
  - o Offering: Sales
  - o Functional Area: Sales Foundation



2. Search for the profile option code **FND\_CLASSIC\_INTERFACE**. This profile option enables access from the Navigator and springboard to the more details pages when there are more and less detail versions of the same page. If not set, the default is the less details version.
3. You can set this profile option at the site level or for individual users. Choose one of the following settings:
  - o Yes: The landing page is the more details UI.
  - o No: The landing page is the less details UI.
4. Search for the profile option code **MOT\_DEFAULT\_CLASSIC\_INTERFACE**. This profile option is also accessed through the Manage Administrator Profile Values task.
5. Enter one of the following settings for this site-level profile option:
  - o Y: The territories landing page is the More Details UI and users can't access the Less Details UI used to directly change active territories.
  - o N: The territories landing page is the Less Details UI and users can make changes directly to active territories. Users can also navigate back and forth between the More Details and the Fewer Details UIs.

## Change the Default for the Include Customer Hierarchy Option in Inclusions and Exclusions

You can define a territory coverage by selecting individual customer accounts to be included whether or not they match other coverage criteria.

You can also select customers as exclusions for the territory. They're excluded even though they meet other coverage criteria. Your selected customer includes all accounts in that customer's hierarchy. You can deselect the Include Hierarchy check box to not include the hierarchy for that customer. Change the `ORA_MOT_INCLUDE_CUST_HIERARCHY` setting to No and the Include Hierarchy check box defaults to deselected.

To change the profile option:

1. In the Setup and Maintenance work area, go to the Manage Administrator Profile Values task:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
2. Search for the Include Customer Hierarchy (`ORA_MOT_INCLUDE_CUST_HIERARCHY`) profile option.
3. Change the site-level profile option to No to show the Include Hierarchy option deselected when you add a customer inclusion or exclusion. The default value is Yes, which selected the Include Hierarchy option when you add an inclusion or exclusion.

## Copy Extensible Fields from Parent Profile Option

Fields, including extensible fields for the Sales Territory Resource and Sales Territory objects, are copied to the child territory from the parent when you create it.

If you don't want the extensible fields to be copied from parent to child, change the profile option `ORA_MOT_COPY_EXT_FIELDS_FROM_PARENT`, Copy Extensible Fields from Parent, from Yes to No.

## Enable Prospects for Inclusion in Sales Territories

By default, you can only include accounts of type customer in sales territories. You can enable the inclusion of accounts of type prospect, by setting the profile option Account Types Enabled for Assignment (ZCA\_ASSIGNMENT\_ACCT\_TYPE\_ENABLED).

1. In Setup and Maintenance, go to the Manage Administrator Profile Values task:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
2. Search for the profile option ZCA\_ASSIGNMENT\_ACCT\_TYPE\_ENABLED, Account Types Enabled for Assignment
3. Change the profile value to `ZCA_CUSTOMER,ZCA_PROSPECT`. Make sure you leave no space between the two entries.

**Note:** There's a slight functionality difference between the two tabs in the Territories Work area for prospect accounts. On the Territories tab, you can add any prospect account. In the Sales Territories Hierarchy tab, the prospect accounts must also be part of an account hierarchy underneath an account of type customer.

### Related Topics

- [Sales Territory UIs for Different Uses](#)

## Address Dimension

### Enable the Address Dimension

Use the Address dimension to set up sales territories by a combination of address elements, such as state, city, and postal code. The application matches your entries using a simple string comparison. You enable the Address dimension by selecting address attributes.

You can't enable both Geography and Address dimensions.

1. In the Setup and Maintenance work area, use the following:
  - o Offering: Sales
  - o Functional Area: Territories
  - o Task: Enable Dimensions and Metrics
2. Click **Edit**.
3. In the Dimensions region, click **Select and Add**.
4. Select the Address dimension and click **OK**.
5. In the Address Attributes region, select to make attributes available for defining territory coverage. Country is required and is selected for you. Postal Code and City are the two that are most often used.
6. From the Actions menu at the page level, select **Load and Activate**.

When you define a territory, you see your selected address attributes in the Address Coverage region of the Dimensions tab. Enter your address definition in the correct column. For Canada, `2%` is an example for all postal codes that start with

E. You can enter a range of postal codes, a single postal code, or partial postal codes followed by percent like the **94065%** example. Only postal codes accept a range, like **10001-"20005-9999"**, or accept the percent sign.

## Address Dimension Examples

When you define territories using address, you need to keep in mind that assignment of territories matches the characters (ignoring capitalization).

How many different ways do you expect people to enter a state or city name? If it's not in your definition, it won't match. Each row in your territory address definition is OR criteria. The data within a row are AND conditions.

You can end up with multiple rows to cover different variations of city and state.

| City        | State    |
|-------------|----------|
| St. Louis   | MO       |
| Saint Louis | MO       |
| St Louis    | MO       |
| St. Louis   | Missouri |
| Saint Louis | Missouri |
| St Louis    | Missouri |

It helps to be familiar with your data and any common errors or shortcuts.

The postal code attribute accepts a range, using a hyphen. You can also define a "begins with" using the percent sign at the end of your value. Place quotes around a 5+4 postal code so the hyphen isn't read as a range. These postal code definition examples show how the matching works. They aren't necessarily valid postal codes.

| Postal Code Defined | Matching Address | Address Not Matched           |
|---------------------|------------------|-------------------------------|
| 94065               | 94065            | 94065-2808<br>94065-<br>94066 |
| "94065-2811"        | 94065-2811       | 94065<br>94065-2813           |
| 94065-94070         | 94065            | 94070-2800                    |

| Postal Code Defined        | Matching Address                                      | Address Not Matched         |
|----------------------------|-------------------------------------------------------|-----------------------------|
|                            | 94065-2808<br>94065-                                  | 94071                       |
| "94065-0000"- "94070-9999" | 94065-0000<br>94065-2808<br>94066<br>94065-4318221    | 94065-<br>94071             |
| G1-G9                      | G1<br>G1 7AV<br>G9<br>G10 8AW                         | G90<br>G90 8AW              |
| G1 0AA-G99 9ZZ             | G1 7AU<br>G9 8DD<br>G99 8AW<br>G100<br>G99<br>G10 8AW | G1                          |
| G1 0AA-G9 9ZZ              | G1 7AU<br>G9 8DD<br>G10                               | G1<br>G99<br>G99 8DD        |
| G1%                        | G1<br>G1 7AU<br>G11 8SW                               | G9<br>G99                   |
| SW1A%                      | SW1A<br>SW1A 6AN                                      | SW1<br>SW1W 8BC<br>SW2W 9BC |
| SW1%                       | SW1<br>SW1 6AN<br>SW1W                                | SW2 6AN                     |

| Postal Code Defined | Matching Address                     | Address Not Matched |
|---------------------|--------------------------------------|---------------------|
| V0A-V9Z             | V0A<br>V0A 0G9<br>V1A 7B9<br>V9Z     | V9Z 9D8             |
| V0A 0A0-V9Z 9Z9     | V0A 0G9<br>V1A 7B9<br>V9Z<br>V9Z 9D8 | V0A                 |

## Territory Dimensions

### How to Set Up Territory Dimensions

Dimensions are attributes that define jurisdictional boundaries of territories. For example, you can use the address dimension to define territories by country or postal code.

Every customer that falls within the defined geography is assigned to the territory and to the resources for that territory. You assign customers, partners, leads, and opportunity items to the correct territories using dimensions. All dimension values combine to define the territory boundaries. For example, if Address is set to United States and Customer Size is set to Large, then the territory is assigned to only large customers within the United States.

### Customer and Partner Inclusions

By default, you can define territories by selecting customers or partners to be included in the territory. Customers and partners are available to select from Customer Data Management for inclusions and exclusions. When a merge action eliminates duplicate records, one record can be replaced by another. If a customer included in or excluded from a territory is changed through the merge process, then the new customer record automatically replaces the old record in the territory.

### Dimensions

You must enable dimensions before you can use them to define territories. The dimensions available to assign customers or partners to a territory are:

- Address
- Account Type  
The account type specifies if a customer is a named account or not.
- Customer Size
- Industry

- Organization Type
- Additional dimensions based on selected classification categories to match specific customer or partner information

A territory assigned to a customer or partner is also assigned to the corresponding leads and opportunity items. These dimensions define boundaries specifically for leads and opportunity items:

- Business Unit
- Product  
Product groups and products form a hierarchy in the sales catalog.
- Sales Channel  
The available sales channels are Direct, Indirect, and Partner.

You must enable each dimension that the sales organization plans to use for automatically assigning territories to customers, partners, leads, or opportunity items. All dimensions except account type require some preparation before you enable and use them.

## Dimensions You Can Modify

You can modify these dimensions or use them as provided:

- Customer Size  
You can change the provided customer sizes within the **Organization Size** lookup type.
- Industry  
The industry hierarchy is from the customer classification module. When you enable the Industry dimension in Enable Dimensions and Metrics, you must also select the classification category that you want to use. The available selections include only classification categories belonging to the Industrial Categories grouping. Your selection modifies the profile option Industry Classification Category.  
You can assign primary and nonprimary industry values to accounts. When an account is assigned multiple classification values, for the purposes of territory and rule-based assignment, the assignment engine can use all of the values or only the primary account classification. Opportunity assignment also supports multiple classification values. For more information about assigning accounts using industry classification codes, see the white paper, Industry Classification and Opportunity Assignment (document ID 2086014.1) available on My Oracle Support.
- Organization Type  
To change the available organization types, edit the Organization Type category using the Manage Classification Categories task in the Setup and Maintenance work area, Sales offering, Territories functional area. You can assign primary and nonprimary organization type values to accounts. When an account is assigned multiple classification values, for the purposes of territory and rule-based assignment, the assignment engine can use all of the values or only the primary account classification. Opportunity assignment also supports multiple classification values. For more information about assigning accounts using industry classification codes, see the white paper, Industry Classification and Opportunity Assignment (document ID 2086014.1) available on My Oracle Support.
- Sales Channel  
You can add additional channels under the Partner sales channel.

## Dimensions Requiring Preparation

See related topics to find out how to prepare the following dimensions:

- Business Unit
- Address
- Product
- Auxiliary Dimensions

### *Related Topics*

- [Prepare the Product Dimension](#)
- [Define Auxiliary Dimensions](#)

## Synchronize Territory Dimension Members

When you define territories, you can select dimension members provided by source data that can change, such as lookup codes or classification values. You must reload the data to keep it current.

These dimensions can become out of date due to source data changes:

- Industry
- Customer Size
- Organization Type
- Product
- Sales Channel
- Business Unit
- Auxiliary 1, 2, or 3

If, for example, you know there are changes in the classification category used for the Organization Type dimension, you must load them and activate them.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Territories
  - Task: Enable Dimensions and Metrics
2. Go to **Actions > Load and Activate**.

An alternative is to use the Territories functional area task **Run Territory Dimension Synchronization** to load and activate changes in dimension members.

## Prepare the Product Dimension

The Product dimension captures leads and opportunity line items to assign them to territories. You create a hierarchy of products and product groups in the sales catalog before enabling the Product dimension.

Salespeople can select the products or product groups when creating leads or opportunities. When you include a product group in a territory coverage, the territory then captures leads and opportunity line items containing a product within the hierarchy of the selected product group.

**Tip:** A good practice is to initially set up your sales catalog using product groups, and then add individual products or inventory items if needed.

1. Create your hierarchy of product groups and products, following the instructions in the Sales Catalogs chapter.
2. Publish your sales catalog.
3. Use the **Manage Product Group Usage** task in the Sales Catalog and Products functional area to add your root product group as the **Base** usage.
4. Go to the **Enable Dimensions and Metrics** task in the Territories functional area.
5. Add **Product** to the enabled dimensions.
6. Click **Load and Activate** to start the background process. The process loads the sales catalog data to become dimension members available for selection when defining territories. The process also loads dimension member data for other enabled dimensions.
7. When changes occur in the sales catalog, you must again run the Load and Activate process to update the Product territory dimension member data. You can perform the maintenance task **Run Territory Dimension Synchronization** to schedule the Load and Activate process.
8. A good practice is to run full reassignment processes for leads and opportunities after updating Product dimension members in the previous step.

#### *Related Topics*

- [Sales Catalog High-Level Setup Steps](#)

## Dimension Parameters

Use parameters to refine the definition of each dimension so it best fits business requirements.

Three dimensions use parameters:

- Industry
- Time
- Product

### Industry

Use the parameter to set the number of levels in the industry hierarchy that display in the dimension member selection screen.

### Time

Set the start of the time period used in calculating metrics using the Calendar Start parameter. Set the number of years prior to today's date when the calendar starts for metrics.

### Product

Use the parameter to set the number of levels in the product hierarchy that display in the dimension member selection screen.



## Define Custom Dimensions

You can define up to ten custom dimensions that will match with customer attributes. The custom dimensions can be used with account, opportunity, lead, deal, or partner objects.

A limited set of sales account or opportunity/revenue standard fields, such as the line of business or revenue type category, are available to use with custom dimensions. For leads, deals, or partners, any standard or custom field, for example a custom field Branch or Sales Market, can be used with custom dimensions. Your custom dimensions can be viewed and managed in active territories, territory proposals, REST services, and export/import management.

1. Define a standard lookup to become the source for dimension members for the custom dimension.
2. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Territories
  - o Task: Enable Dimensions and Metrics
3. Add a custom dimension and rename the dimension to reflect the business purpose for this dimension.
4. Select the correct lookup type that you created.
5. Load and activate your enabled dimensions.

### What to do next

Add a field for assignment and map your new custom dimension for territory assignment to accounts, partners, revenue lines, leads, or deals.

### Related Topics

- [Custom Dimensions for Revenue Assignment Example](#)
- [Custom Dimensions for Lead Assignment Example](#)

## Add an Attribute for Revenue Assignment

Add one or more lookup fields for territory assignment to revenue lines.

You can add one or more of the following for territory assignment to revenue lines:

- A standard opportunity or revenue lookup field
- A custom opportunity or revenue lookup field

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Sales Assignment Manager Objects
2. Select **Revenue**.
3. On the Attributes tab, click **Add Row**.
4. Select the lookup field you want to use, such as Line of Business or Revenue Type Category.

## 5. Save and publish.

### What to do next

Add an assignment mapping to use this attribute as a custom dimension.

# Add a Revenue Assignment Mapping

Map your new custom dimension for territory assignment to revenue lines.

### Before you start

You created a lookup that provides values for the custom dimension. You added the lookup field as an attribute for revenue assignment.

### Here's what to do

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Sales Assignment Manager Objects
2. Select **Revenue**.
3. In the Candidates tab, select **Territory**.
4. In the Revenue Territory: Revenue Sets tab, select the **Sales Account** mapping set.
5. In the Mappings table, click **Create**.
6. Select or enter values for these fields:

| Type                            | Attribute                                              |
|---------------------------------|--------------------------------------------------------|
| Exact Match                     | Select                                                 |
| Function Code                   | Enter the appropriate dimension code, such as Ext1     |
| Candidate Object                | Territory                                              |
| Work Object                     | Revenue                                                |
| Candidate Object Attribute: Low | Dimension Member ID                                    |
| Work Object Attribute: Low      | Select the appropriate field, such as Line of Business |

7. Click **OK**.
8. Save and publish.

# Add an Attribute for Lead Assignment

Add one or more lead lookup fields or custom child object fields for territory assignment to leads.

You can add one or more of the following for territory assignment to leads:

- A standard lead lookup field

- A custom lead lookup field
- A lead custom child object field

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Leads
  - Task: Manage Sales Lead Assignment Objects
2. Select **Sales Lead**.
3. On the Attributes tab, click **Add Row**.
4. Select the standard or custom lookup field you want to use, such as Branch or Sales Market.
5. Save and publish.

### What to do next

Add an assignment mapping to use this attribute as a custom dimension.

## Add a Lead Assignment Mapping

Map your new custom dimension for territory assignment to leads.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Leads
  - Task: Manage Sales Leads Assignment Objects
2. Select **Sales Leads**.
3. In the Candidates tab, select **Sales Lead Territory**.
4. In the Sales Lead Territory: Mapping Sets tab, select **Mapping Set 1**.
5. In the Mappings table, click **Create**.
6. Select or enter values for these fields:

| Type                            | Attribute                                                    |
|---------------------------------|--------------------------------------------------------------|
| Exact Match                     | Select                                                       |
| Function Code                   | Enter the appropriate dimension code, such as Ext1           |
| Candidate Object                | Territory                                                    |
| Work Object                     | Sales Lead                                                   |
| Candidate Object Attribute: Low | Dimension Member ID                                          |
| Work Object Attribute: Low      | Select the appropriate field, such as Branch or Sales Market |

7. Click **OK**.
8. Repeat steps 5-7 for each mapping set.
9. Save and publish.

## Custom Dimensions for Revenue Assignment Example

This example models sales organizations where salespeople are responsible for either new sales or renewal and expansion sales.

The use case is to define territories with the custom dimension Revenue Type Category in addition to account, product, and sales channel dimensions.

1. Use Manage Standard Lookups to create the lookup type `ORA_MOO_REVN_CATEGORY_TYPE` with the lookup codes New, Renew, and Expansion.
2. Use Application Composer to add the Revenue Tpe Category field to Revenue Table columns in the Opportunity Details page.
3. In Setup and Maintenance, open the Enable Dimensions and Metrics task. select the Edit action, and add the Extension 2 dimension.
4. For the dimension source find and select the lookup type `ORA_MOO_REVN_CATEGORY_TYPE`.
5. Save and close.
6. Perform the Load and Activate action. Use the Refresh Status action to monitor processing and completion of the processes.
7. In Setup and Maintenance, use the Manage Sales Assignment Manager Objects task and add a mapping for the Revenue object.
8. In the Attributes tab add the Revenue Type Category attribute.
9. In the Candidates tab select Territory and the Territory: Mapping Sets tab.
10. Select the Sales Account mapping set.
11. Click Add and enter these values:

| Type                                       | Attribute             |
|--------------------------------------------|-----------------------|
| Exact Match                                | Select                |
| Function Code                              | Ext2                  |
| Candidate Object                           | Territory             |
| Work Object                                | Revenue               |
| Candidate Object Attribute: Low            | Dimension Member ID   |
| Work Object Attribute: Null Value Handling | Derive mapping value  |
| Work Object Attribute: Low                 | Revenue Type Category |

12. Save and publish.

### Results:

Now you can define territories with a Revenue Type Category coverage, and use this information when assigning territories to revenue lines.

## Custom Dimensions for Lead Assignment Example

This example sets up the Branch custom dimension for lead assignment.

The use case is to define territories with the Branch custom dimension in addition to the account and product dimensions.

1. In Application Composer, create a fixed choice list called Branch for the Lead standard object..
2. In the List of Values region, create a new lookup type MKT\_LEAD\_BRANCH called Branch, and add lookup codes for each of the company branches.
3. Add the Branch field to the Lead Detail page and publish.
4. In Setup and Maintenance, open the Enable Dimensions and Metrics task, select the Edit action, and the Extension 3 dimension.
5. For the dimension source find and select the lookup type MKT\_LEAD\_BRANCH. Save and close.
6. Perform the Load and Activate action. Use the Refresh Status action to monitor processing and completion of the processes.
7. In Setup and Maintenance, use the Manage Sales Assignment Manager Objects task and add a mapping for the Sales Lead object.
8. In the Attributes tab add the Branch attribute.
9. In the Candidates tab select Territory and the Sales Lead Territory: Mapping Sets tab.
10. Select Mapping Set 1.
11. Click Add and enter these values:

| Type                                       | Attribute            |
|--------------------------------------------|----------------------|
| Exact Match                                | Select               |
| Function Code                              | Ext3                 |
| Candidate Object                           | Sales Lead Territory |
| Work Object                                | Sales Lead           |
| Candidate Object Attribute: Low            | Dimension Member ID  |
| Work Object Attribute: Null Value Handling | Derive mapping value |
| Work Object Attribute: Low                 | Branch               |

12. Save and publish.

### Results:

Now you can define territories with a Branch coverage, and use this information when assigning territories to leads.

## Define Auxiliary Dimensions

You can define up to three auxiliary dimensions that will match with customer attributes.



## Defining Auxiliary Dimension 1, 2, or 3

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

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Territories
  - o Task: Manage Classification Categories
2. Create a new classification category. You can allow parent code assignment. If you allow multiple class code assignments, then the classification that's designated as Primary in the customer record is the one that's matched to assign the customer to a territory.
3. Add classification codes for the new category. You can form a hierarchy with the codes or not.
4. Use the **Manage Classification Groups** task and search for the CUSTOMER\_GROUP category group code. Edit the group and add your new classification category to the group.
5. Add an auxiliary customer dimension in **Enable Dimensions and Metrics** and select the correct classification category that you created. Then this classification category becomes the source for dimension members for the auxiliary dimension.
6. Load and activate your newly enabled dimensions.

## Setting Assignment Mapping

Map your new dimension for territory assignment to accounts.

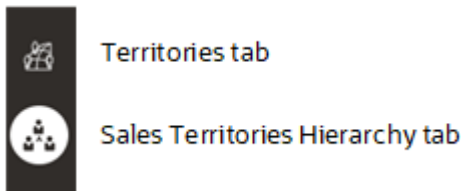
1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Accounts and Contacts
  - o Task: Manage Customer Center Assignment Objects
2. Select **Account**.
3. Click the **Candidates** tab.
4. Select **Account Territory**.
5. Click the **Account Territory: Mapping Sets** tab.
6. Select **Mapping Set 1**.
7. Find the auxiliary dimension you want to use, such as **Auxiliary Dimension 1**.
8. Click **Edit**.
9. Deselect **Inactive**.
10. Click **OK**.
11. Click **Save and Publish**.

# Territory Hierarchy

## Sales Territory UIs for Different Uses

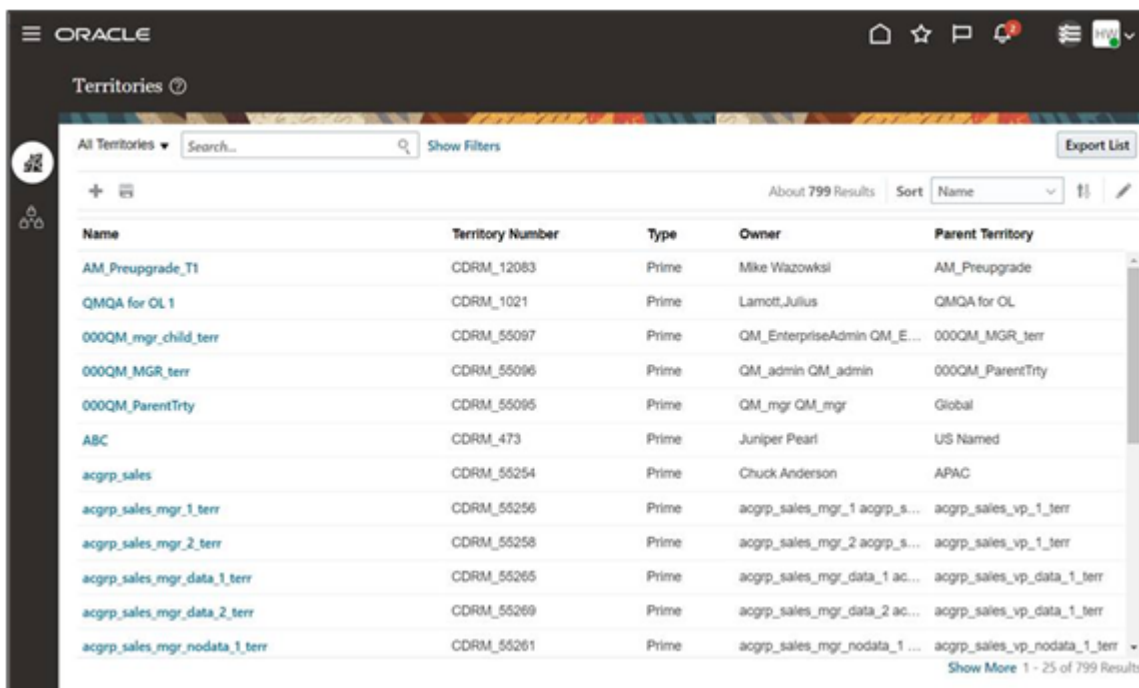
You have the option of using multiple UIs to manage sales territories. You can make changes to individual territory coverage and other adjustments in Workspace and in the Territories tab of the Territories work area. For creating territory hierarchies, you must use the Sales Territories Hierarchy tab of the Territories work area.

The Territories work area includes two tabs: a full-featured UI that's designed for setting up the territory hierarchy and a simpler UI that you can use for ongoing minor adjustments to territories after they're set up. Users can toggle between the two UIs by clicking the **Territories** and **Sales Territories Hierarchy** tabs on the left side of the Territories work area or in Workspace.



## Territories Tab for Making Changes to Individual Territories

When you open the Territories work area, the application displays the Territories tab. The tab is optimized for sales managers who want to make simple changes to individual territories, such as changing territory owners or minor tweaks in coverage.



| Name                          | Territory Number | Type  | Owner                        | Parent Territory             |
|-------------------------------|------------------|-------|------------------------------|------------------------------|
| AM_Preupgrade_T1              | CDRM_12083       | Prime | Mike Wazowski                | AM_Preupgrade                |
| QMQA for OL 1                 | CDRM_1021        | Prime | Lamott, Julius               | QMQA for OL                  |
| 000QM_mgr_child_terr          | CDRM_55097       | Prime | QM_EnterpriseAdmin QM_E...   | 000QM_MGR_terr               |
| 000QM_MGR_terr                | CDRM_55096       | Prime | QM_admin QM_admin            | 000QM_ParentTrty             |
| 000QM_ParentTrty              | CDRM_55095       | Prime | QM_mgr QM_mgr                | Global                       |
| ABC                           | CDRM_473         | Prime | Juniper Pearl                | US Named                     |
| acgrp_sales                   | CDRM_55254       | Prime | Chuck Anderson               | APAC                         |
| acgrp_sales_mgr_1_terr        | CDRM_55256       | Prime | acgrp_sales_mgr_1 acgrp_s... | acgrp_sales_vp_1_terr        |
| acgrp_sales_mgr_2_terr        | CDRM_55258       | Prime | acgrp_sales_mgr_2 acgrp_s... | acgrp_sales_vp_1_terr        |
| acgrp_sales_mgr_data_1_terr   | CDRM_55265       | Prime | acgrp_sales_mgr_data_1 ac... | acgrp_sales_vp_data_1_terr   |
| acgrp_sales_mgr_data_2_terr   | CDRM_55269       | Prime | acgrp_sales_mgr_data_2 ac... | acgrp_sales_vp_data_1_terr   |
| acgrp_sales_mgr_nodata_1_terr | CDRM_55261       | Prime | acgrp_sales_mgr_nodata_1 ... | acgrp_sales_vp_nodata_1_terr |

On this tab, you can add any prospect accounts as named accounts in your sales territories. In the Sales Territory Hierarchy Tab, the prospect accounts you add must be part of an account hierarchy below a customer account.

**Note:** If you want to use add accounts of type prospect to sales territories, make sure that the profile option Account Types Enabled for Assignment (ZCA\_ASSIGNMENT\_ACCT\_TYPE\_ENABLED) is enabled for prospects by setting the profile to ZCA\_CUSTOMER, ZCA\_PROSPECT, see the topic *Enable Prospects for Inclusion in Sales Territories*.

## Sales Territories Hierarchy Tab for Building Your Sales Territory Hierarchy

To build sales territory hierarchies, you use the Sales Territory Hierarchies tab. On the Sales Territories Hierarchy tab, territory setup is done not on live territories, but in a proposal that you must activate after your setup is complete. Proposals make it possible to make territory revisions without affecting live territories and to create different versions to be used at different times.

Here's a screenshot of the Active Territories page on the tab. The callouts highlight and describe different features on the page.

| Callout Number | Feature Description                                                                                                                   |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------|
| 1              | The left pane of the Active Territories page displays the active territories as a collapsible hierarchy.                              |
| 2              | Selecting a territory, displays territory details at the bottom of the page.                                                          |
| 3              | Using the <b>Manage Proposals</b> button, you can create territory proposals with your territory changes.                             |
| 4              | The <b>Show Dimensions,Hide Dimensions</b> button lets you toggle the display of dimension details in the list of active territories. |



Active Territories ?

Currency = US Dollar

Actions View Format Search

Basic Information

| Territory Name                                    | Type  | Territory Owner |
|---------------------------------------------------|-------|-----------------|
| Global                                            | Prime | Mike Wazowski   |
| 000QM_ParentTirity                                | Prime | QM_mgr QM_mgr   |
| APAC                                              | Prime | Chuck Anderson  |
| AutoRestActTer1_430961_06-17-2021 04:07:14_Run-38 | Prime | Mike Wazowski   |
| AutoRestActTer1_430961_06-17-2021 04:11:06_Run-be | Prime | Mike Wazowski   |
| AutoRestActTer1_430961_06-17-2021 04:15:00_Run-a1 | Prime | Mike Wazowski   |
| AutoRestActTer2_430961_06-17-2021 04:07:14_Run-38 | Prime | Mike Wazowski   |
| AutoRestActTer2_430961_06-17-2021 04:11:06_Run-be | Prime | Mike Wazowski   |
| AutoRestActTer2_430961_06-17-2021 04:15:00_Run-a1 | Prime | Mike Wazowski   |
| AutoRestActTer3_430961_06-17-2021 04:07:14_Run-38 | Prime | Mike Wazowski   |

Columns Hidden 3 Columns Frozen 1

Global: Details ?

Profile Coverages Analytics

Summary ?

Owner Mike Wazowski

Type Prime

Territory Function

Creation Date 4/29/09

Last Update Date 4/12/21

Partner

Description

Eligible for Quote

Revise Quote

Manage Proposals Show Dimensions Show Metrics

## Differences Between the Two UIs

Here are the major differences between what you can do in the two UIs. Whichever UI you're using to make your territory changes, your records aren't reassigned until the appropriate assignment process runs.

| Feature                                                       | Sales Territory Hierarchies Tab                                                                                                                                                                                                                                | Territories Tab                                                                                                                             |
|---------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| Changing a territory owner or member                          | Your changes aren't effective until you activate the proposal.                                                                                                                                                                                                 | Your changes take effect immediately.                                                                                                       |
| Making changes without immediately effecting live territories | You create territories in a territory proposal that isolates your changes from existing active territories until you activate. You can even decide to create different proposals to go live in the future, to account for seasonal sales demands, for example. | Territory proposals aren't available. Changes you make to territories are immediate.                                                        |
| Inheriting the properties of parent territories               | When you create child territories in both UIs, the child territories automatically inherit the properties and coverage of the parent                                                                                                                           | At creation, the child territories automatically inherit the properties and coverage of the parent territories. However, in the Territories |

| Feature                                                           | Sales Territory Hierarchies Tab                                                                                                                                                                           | Territories Tab                                                                                     |
|-------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
|                                                                   | territories. In the Sales Territory Hierarchies Tab, you can also link territories so that any subsequent change in coverage for the parent territory is automatically reflected in the linked territory. | tab UI, you can't link the territories to make subsequent coverage changes reflected automatically. |
| Include prospect accounts in sales territories as named accounts. | You can only add prospect accounts that are part of an account hierarchy and below an account of type customer.                                                                                           | You can add any prospect account to a territory.                                                    |

## How You Can Make the Sales Territory Hierarchies UI the Default and Only UI

By default, users can toggle between both UIs using the tabs. You can make the Sales Territory Hierarchies UI the default UI and remove the tab controls. To change the defaults, all you have to do is set the system profile option Default to Territory Classic Interface (MOT\_DEFAULT\_CLASSIC\_INTERFACE) to Yes. The setting, which is made at the site level, affects all users. You can edit the system profile value option from the Setup and Maintenance work area using the following:

- Offering: Sales
- Functional Area: Sales Foundation
- Task: Manage Administrator Profile Values

## Use Workspace for Resolving Territory Gaps and Overlap Issues

Managers who need to resolve territory gaps and overlap issues in existing territories, can also use Workspace. Both Workspace and the Territories work area let you search for territories not only by salespeople but also by dimension coverage details, such as included accounts, products, or geographies. The territories features in Workspace are the same as in the Territories tab in the Territories work area. What Workspace doesn't have is the ability to create and manage hierarchies. For that you must go to the Territories work area.

The screenshot shows the Oracle Workspace interface for managing territories. It features a search bar at the top, a filters section on the left, and a table of results. The filters section includes checkboxes for Type (Prime, Channel Sales Manager, Overlay, Inside Sales) and Leaf Territory (True, False). The table displays columns for Name, ID, and Type, with a list of territories including Aaron Moore, Academic Advisor, Ada Maria, Adam Baker, Adam White, Ahmed Shabaan, Akemi Otsuka, Alain Dumas, Alan Brown, Alan Hooper, and Alan Reed.

| Filters                                        | Clear All | Hide Filters | About 623 Results | Sort | Name             |
|------------------------------------------------|-----------|--------------|-------------------|------|------------------|
| ^ Type                                         | ***       |              |                   |      |                  |
| <input type="checkbox"/> Prime                 | 592       |              |                   |      | Aaron Moore      |
| <input type="checkbox"/> Channel Sales Manager | 21        |              |                   |      | Academic Advisor |
| <input type="checkbox"/> Overlay               | 6         |              |                   |      | Ada Maria        |
| <input type="checkbox"/> Inside Sales          | 4         |              |                   |      | Adam Baker       |
| Search                                         |           |              |                   |      |                  |
| Adam White                                     |           |              |                   |      |                  |
| Ahmed Shabaan                                  |           |              |                   |      |                  |
| Akemi Otsuka                                   |           |              |                   |      |                  |
| Alain Dumas                                    |           |              |                   |      |                  |
| Alan Brown                                     |           |              |                   |      |                  |
| Alan Hooper                                    |           |              |                   |      |                  |
| Alan Reed                                      |           |              |                   |      |                  |

## Work with Active Territories in Workspace

Use Workspace to create and make changes to your active territory hierarchy. If you prefer to use proposals to change multiple territories, go to the Sales Territories Hierarchy tab.

Search and filter your list to begin working. When you open and edit a territory from your list, the Next button opens the next territory to edit. If enabled and you have the correct privileges, you can work in nested tabs to navigate across and between territory records without losing context. Use dynamic tabs and nested tabs to resolve territory gaps and overlaps. Manage customer-centric territories in Workspace. Use other methods for partner-centric, resource-centric, and inheritance recipient territories.

You can search by territory details and coverage attributes. Here are some coverage search tips.

- The industry, organization type, product group, and auxiliary 1-3 dimensions are hierarchical. A search for descendant member values finds only territories defined explicitly with the descendant value. For example, to search for territories which cover the product group Laptop X, but not its parent Hardware, Laptop X must be present in the territory coverage.
- To search for territories using customer inclusions or exclusions, use the Coverage: Account: Name filter.
- Accounts are hierarchical. To search for territories based on a descendant account, the account must be explicitly selected in the territory coverage. For example, to search for territories which include Account ABC USA, this account, and not the parent ABC Global must be present in the territory coverage.
- Accounts are hierarchical. To search for territories based on a descendant account, the account must be explicitly selected in the territory coverage. For example, to search for territories which include Account "ABC USA", this account, and not the parent "ABC Global" must be present in the territory coverage.
- When you use dimension filters to search, you can use only one dimension filter. Here are some exceptions:
  - You can use the coverage type filter together with a dimension filter.
  - Multiple address dimension filters can be used together. For example: Coverage: Country and Coverage: Postal Code
  - The Coverage: Sales Channel and coverage: Sales Subchannel filters can be used together.
- For most dimension filters the search finds all territories with a regular dimension coverage or an inclusion or exclusion coverage matching the value.
- You can't search using these coverage fields:
  - Include Hierarchy: This indicates that the account plus its hierarchy is included or excluded from the territory coverage.
  - Coverage: Partner: This field represents the partner accounts that are included or excluded in the territory coverage.

### Related Topics

- [Adaptive Search Configuration Provided by Oracle](#)
- [How can I enable territory dynamic tabs and nested dynamic tabs in Workspace?](#)
- [How do I switch to Work Areas powered by Adaptive Search](#)
- [Enable Business Objects for Adaptive Search](#)
- [Get Started with Search in Workspace and Work Areas](#)
- [How do I use dynamic and nested dynamic tabs?](#)

## Territory Proposals

Use territories to assign teams to leads, opportunity items, and customers. You model and explore territory definitions with a territory proposal without affecting active territories. Activate a proposal to update the existing territory definitions.

### Typical Territory Proposal Workflow

This table shows a typical workflow for territory proposals.

| Task                            | Description                                                                                                                                                     |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create a proposal               | Create the proposal and set an activation date.                                                                                                                 |
| Add a territory to the proposal | Add an existing territory to the proposal, or create a new territory. Repeat for additional territories.                                                        |
| Define coverage                 | Select attributes to define the boundaries of each territory.                                                                                                   |
| Select the territory team       | Every territory must have an owner and can have additional team members.                                                                                        |
| Analyze and compare proposals   | Review metrics and graphs to analyze proposals for such things as number of customers and amount of closed opportunity revenue in each territory.               |
| Activate the proposal           | Activate a proposal. The proposal remains in pending activation status until the activation date is reached. You can reopen and update the proposal until then. |
| Run reassignment processes      | Reassignment processes are scheduled to run periodically.                                                                                                       |

#### Related Topics

- [Territory Coverage](#)
- [Territory Proposal Statuses](#)
- [Territory Proposal Rules](#)

## Create the Territory Hierarchy Using Proposals

You create one territory hierarchy starting with a single top territory. Create more than one what-if proposal to compare and decide which is the most equitable.

## Create a Proposal

Use the territory proposal to create many territories at one time.

1. In Workspace, click the **Sales Territories Hierarchy** tab.
2. Click the **Manage Proposals** button on the Active Territories page.
3. In the Current Territory Proposals region, click **Create** (the plus sign icon).
4. Enter a name for the proposal.
5. Leave the **Activation Date** field blank. This will cause the proposal to be activated immediately after you build your territories.
6. Click **Save and View**.

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

## Create the Master Catchall as the Top of the Hierarchy

Use this procedure to create the territory at the top of the sales territory hierarchy as the master catchall territory. Because the top territory is usually owned by a senior manager or executive and you don't want executives troubleshooting territory assignment, you must add a sales administrator, or another resource who does the troubleshooting, as a territory team member.

1. In the Territories region of your territory proposal, click **Create**.
2. Enter the territory name.
3. Enter the resource who's the owner of the top territory"
  - 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 territory **Type** list, select **Prime**.
5. From the **Enable Forecasting** list, select **Prime only** unless you're creating forecasts for overlay territories. This setting enables the territory to be used for forecasting.
6. Add the sales administrator to this territory:
  - a. In the Territory Team tab in the Additional Information region, click **Select and Add**.
  - b. Search for the resource using any of the fields.
  - c. Select the resource from the search results and click **OK**.
7. Click **Save and Close**.

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

8. With the territory selected in the Territories table, click the Coverage tab in the Details region at the bottom of the page.

Every enabled dimension is represented by a column, and each column displays the value of **Any**. This is the setting you want for your master catchall territory. You're now ready to add the rest of the territory hierarchy.

## Add the Rest of the Hierarchy

Add the rest of the sales territory hierarchy from the top down.

1. In the Manage Territory Proposals page, select the name of your proposal to open it for editing.
2. Select the parent territory in the Territories table.

3. Click **Create Child of Selected Territory** (the plus sign icon).
  4. In the Create Territory page, enter the territory name.
  5. Enter the owner for the territory.
  6. Your new territory duplicates the definition from the parent. You can make changes.
    - a. Select the territory type, either **Prime** or **Overlay**.
    - b. If Territory Precedence is enabled, you can select a territory function. Assignment compares all territories with the same function and gives precedence to the territories with included accounts.
    - c. From the **Enable Forecasting** list, select **Prime**, **Overlay**, or **Prime and Overlay**, depending on the territory you're setting up. For managers of both prime and overlay territories, select **Prime and Overlay** so that the managers can adjust forecasts of all their subordinates. Select **Disabled** to remove the territory from forecasting.
  7. Click **Save and Close**.
- You're returned to the Territory Proposal window. You're now ready to specify the coverage for the territory.

You can copy an existing territory to create a territory at the same level in the hierarchy. No child territories are copied..

1. Select the territory you want to copy.
2. Click **Copy territory as a peer with no children**.
3. Enter a name for the new territory.
4. The territory definition is copied from the parent territory of the selected territory. This includes the summary and additional information, including owner, territory type, and the team. Make changes as needed.
5. Save and close.
6. Review the coverage for your new territory. The dimensions, inclusions, and exclusions match the parent territory. To make changes, follow the steps in the next section.

## Define the Territory Coverage

When you create a child territory, it automatically inherits the coverage of its parent, including dimensions, inclusions, and exclusions. You can use a territory that has no coverage definitions as a parent to create a new territory with a clean slate.

1. In the Manage Territory Proposals page, select the name of your proposal.
2. In the Territories table, select the territory you want to change.
3. Click the **Coverage** tab in the **Details** region of the page. Coverage can include Address, Dimensions, Included Customers, and Excluded Customers.
4. If a region has no coverage, then click **Add** in the Actions menu. Otherwise, click **Edit** (the pencil icon) to make changes.
5. For dimensions, either Add or Edit opens Edit Coverage:
  - a. Select the dimension from the **Dimensions** list.
  - b. Add or remove dimension members from the Selected Dimension Members box.

**Tip:** If the Product dimension doesn't show the correct list of products from the sales catalog, then navigate to the Scheduled Processes work area and run the Refresh Denormalized Product Catalog Table for BI process. The wrong products can show up in rare cases where you have changed the root of your sales catalog.
  - c. Save and close.
6. To include specified customers:
  - a. Click **Select and Add**.
  - b. Search for and select a customer.

- c. You can click **Save and Apply** to search for and select another.
  - d. Click **Save and Close**.
7. To exclude specified customers, repeat step 7 in the Excluded Customers region.

## Activate a Territory Proposal

When you finish making changes to your territories, use this procedure to activate your territory proposal and start using the new territories for assignment.

1. Click **Navigator > Territories**.
2. Select the **Sales Territories Hierarchy** tab.
3. In the Active Territories page, click the **Manage Proposals** button.
4. If the proposal you want to activate doesn't appear in the Current Territory Proposals table, select **All Proposals** from the **Proposals** list.
5. Select the proposal and click **Activate**.  
You can see the activation process status in the Details region of your proposal.
6. Click **Done** to return to Manage Proposals.
7. Click **Done** to return to the Overview page. Your territory changes now appear in the list of active territories.

## Create the Territory Hierarchy One Territory at a Time

You can build your active territory hierarchy starting by creating the one top territory. You then add one child territory at a time to a parent territory. When you save a new territory, it immediately becomes active.

To create the top territory:

1. Navigate to Territories. There are no territories listed on the page.
2. Click **Create Territory**.
3. Enter the territory name.
4. Select an owner for the top territory, most likely the VP of Sales.  
The owner appears on the Team Members tab. You can add additional members to the team, and the owner himself can add members later.
5. From the territory **Type** list, select **Prime and Overlay**.  
When you select Prime and Overlay, descendant territories can be Prime Only, Overlay Only, or both.
6. From the **Enable Forecasting** list, select **Prime only** unless you're creating forecasts for overlay territories. This setting enables the territory to be used for forecasting. Your administrator enables the Enable Forecasting field using Application Composer, otherwise it's hidden.
7. Click **Save and Continue**.
8. Click the Dimensions tab.  
All enabled dimensions have **Any** for the coverage. This is correct for your top territory.
9. Save and close.

Add child territories. The child territory copies the parent territory information such as territory type, dimensions, and account inclusions. You then make changes as needed.

1. Select from your territories list the territory that will be the parent to your new territory.
2. Go to the Child Territories tab.

3. Click **Create Territory**.
4. Enter the territory name.
5. Select a different owner for the territory if needed.
6. Change the territory type, if needed.
7. If Territory Precedence is enabled, then you can select a territory function. Assignment compares all territories with the same function and gives precedence to the territories containing included accounts.
8. Click **Save and Close** to keep the definitions that match the parent. You then return to the Child Territories tab for the parent territory. Click **Save and Continue** to stay on the Summary tab for your new territory.
9. In the Dimensions tab, you have several choices in the Edit list, depending on your enabled dimensions and the coverage from the parent.
  - o Edit Address Coverage
  - o Clear Address Coverage
  - o Edit Dimensions and Coverage
    - Select a dimension and move the values you want to the Selected column. Or click **Add Members in Bulk** and enter several members or ranges of members separated by commas.
  - o Remove All
10. To add accounts, select the Inclusions tab.
11. Click **Add Customers** and select **Accounts**.
12. Use the Exclusions tab to select customers to be excluded from the territory. (Use Application Composer to enable the Exclusions tab.)
13. Use the Team Members tab add and remove team members and designate the territory owner.
14. When you complete making all changes, click **Save and Close**.

Your new territory is now active.

If Click to Edit is enabled, you can make changes to information such as territory owner on the workspace list page. Click a row to see the fields you can edit. Make your changes, then click Save or Discard Changes.

## Territory Proposal Statuses

A territory proposal contains definitions for territories. It progresses through different statuses in its life cycle.

This table describes proposal statuses.

| Status             | Description                                                                                                                          |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Draft              | The proposal is first created, and different users can participate to make changes to their child territories.                       |
| Pending Activation | The owner requests that the proposal be activated. The proposal is in pending activation status until the activation date.           |
| Activated          | After the owner requested activation and the activation date is reached the proposal is activated and the territories become active. |
| Failed             | Any changes introduced to territories as part of this proposal aren't made.                                                          |



| Status | Description |
|--------|-------------|
|        |             |

## Territory Proposal Rules

Use territory proposals to explore and evaluate new territory definitions.

Keep these rules in mind:

- Only one definition for a territory can be active at a time.
- You can freely create, edit, and delete territories within a proposal without affecting active territory definitions.
- A territory owner can update a proposal with changes to a subordinate's territory.
- If a given territory is updated in two different proposals, and both of them get activated, the changes of the proposal that's latest to get activated will override the changes in the other proposal. A territory that's added to territory proposal A, but then deleted from proposal B which gets activated first, is reinstated when proposal A is activated.
- If a proposal contains territories added to a parent territory that's now deleted, the new territories are deleted during proposal activation.
- A maximum of 500 territories can be children of the same parent territory.

## Examples of Using Analytics to Test Territory Proposals

View graphs on the Analytics tab to compare your proposed territory changes to existing active territories to determine if your proposal achieves the goals you set. Will the new territories be more equitable and productive?

Also, evaluate territory changes in multiple proposals, or see the results of territory changes made within a single proposal.

### Scenario

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

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

# Territory Coverage

## Territory Coverage

A territory defines who will sell what to whom. You define territory boundaries using dimensions and criteria, not by creating rules.

Use these to define a coverage area:

- Dimensions

Values that define what to include in the territory using categories such as address, product, and industry

- Inclusion Criteria

A list of specific customers or partners, whether or not they meet the dimensional definition. These customers don't have to be designated as named accounts.

- Customer Hierarchy: You can choose to include the customer hierarchy for the selected customer. All customers for the selected customer hierarchy will be assigned to the territory.
- Filtering Conditions: Defined dimensions apply to the included customers and their hierarchies so that only customers that match the dimension definitions get assigned to the territory.
- Other Dimensions: Product or sales channel dimensions defined for all of the included customers or partners.

- Exclusion Criteria

A list of specific excluded customers or partners to be omitted from the territory whether or not they meet dimension definitions. These customers don't have to be designated as named accounts to be excluded. You can choose to also exclude the customer hierarchy for the selected customer.

- Overrides: A way to override what's inherited from a source territory.
- Resource-Centric Coverage

The resource-centric territory hierarchy is generated from your resource hierarchy when you enable forecasts using the quick setup. The Refresh Territories from Resources process synchronizes your territories periodically to match your latest resource hierarchy. The resources become the territory owners.

**Note:** Before you run Refresh Territories from Resources, you must have at least one dimension enabled using the Enable Dimensions and Metrics task and perform the Load and Activate action.

**Note:** We recommend full reassignment to be scheduled for each object. The frequency of this schedule can be different from one object to another, depending on requirements.

## Territory Coverage for Partners

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

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

- *Coverage Defined by End Customer Characteristics (Customer-Centric)*

Define the coverage using the characteristics of the end customer, and specific inclusions and exclusions. As an example, a channel manager is assigned to cover all the indirect opportunities where the end customer is located in California.

- *Coverage Defined by Partner Characteristics (Partner-Centric)*

Coverage is defined using the following attributes of a partner organization:

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

- *Individually Selected Partners*

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

## Territories with No Coverage

You can create a territory that has no coverage by clicking Remove All under Edit on the Dimensions tab. The dimensions have a blank coverage, rather than the value Any. The territory is indirectly defined by the coverage of its descendant territories. You can assign quota to the territory and it can participate in forecasting. The territory can't be automatically assigned to customers, leads, and opportunities, but you can see the assignments of its descendant territories. You can also assign the territory to an opportunity item manually.

## Precedence During Assignment

When you include a customer in the coverage for a territory, that customer is also assigned to any territory with matching dimension coverage. If you don't want the customer to be assigned to both, then one solution is to add the customer as an exclusion from the second territory. Another solution is to enable territory precedence so that assignment automatically assigns the customer only to the territory with the inclusion coverage.

You can limit the automatic exclusion to the territories identified as belonging to the same group. For example, a primary salesperson Z has exclusive ownership of ABC Corporation, in Arizona. However, your product specialist team should also be assigned to ABC Corporation using dimension definitions. Use the Territory Function field to identify each territory with a function to group them.

Here are the territories and their definitions:

- The primary salesperson A's territory is defined with the Primary function.
- The coverage for A's territory is defined by address, including Arizona.
- The primary salesperson Z's territory is identified with the Primary function.

- The coverage for Z's territory contains ABC Corporation in Inclusions.
- The product specialist's territory is identified with the Technical Specialist function.
- The product specialist's territory is defined by address, including Arizona.

Here are the results of the assignment:

- ABC Corporation belongs to primary salesperson Z because the account inclusion takes precedence.
- ABC Corporation isn't assigned to Salesperson A's primary territory because the inclusion territory takes precedence over the territory defined by address.
- ABC Corporation is assigned to a Technical Specialist territory that covers Arizona.

#### Related Topics

- [Examples of Territory Coverage](#)
- [Inheritance Territories](#)
- [Expose the Exclusions Tab and the Enable Forecasting Field](#)

## Examples of Territory Coverage

A territory coverage is a set of boundaries that define what's included or excluded in the territory and what can be sold. Dimensional coverage consists of the combination of one or more territory dimensions.

You can select individual customers (with or without a hierarchy) or partners to include or exclude from the territory in spite of dimension selections. These scenarios illustrate using different coverage.

### Address Territories with Customer Inclusion and Exclusion

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



This figure shows Sue's and Tom's territories.

### Define Individual Customers Only

Salespeople sell to ten to twenty individually assigned customers. You don't define a dimensional coverage, but manually assign the customers as inclusions.

### Key Accounts with Subsidiaries

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

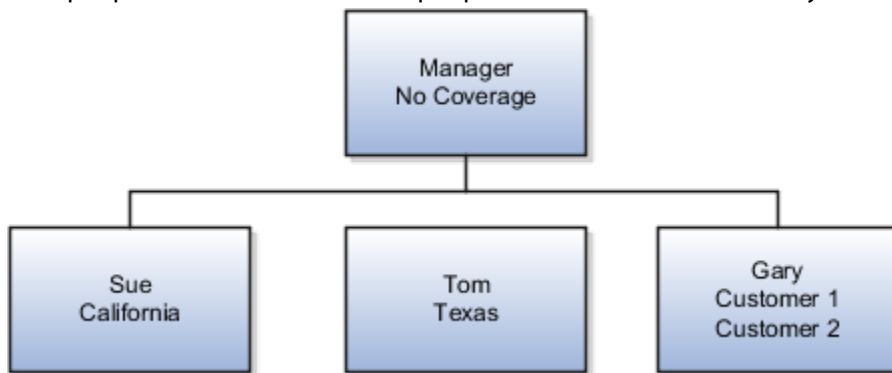
## Forecasting Using a Parent Territory

Create a parent territory with no coverage except the coverage of its children. You can designate each child territory as Forecast not visible to territory owner, and then perform all your forecasting activities for the child territories using the parent territory.

### Parent Territory with No Coverage

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

This figure shows the manager's territory with no defined coverage as the parent territory of three salespeople's territories. The salespeople's territories are defined by address and selected customers.



#### Related Topics

- [Examples of Using Dimensional Coverage](#)
- [Examples of Dimensional Territories](#)

## Inheritance Territories

Sometimes organizations (for example, an industry overlay organization) shadow the prime sales organization. Inheritance territories offer an approach for simplifying the administration of territories for these shadow organizations. Inheritance territories consist of a source territory and one or more recipient territories.

A shadow (recipient) territory is linked to the prime territory with the source territory information. The inheritance territory feature is only available in the More Details pages, where changes to territories are managed using a proposal.

One additional benefit of defining inheritance territories, is that the administrator can override the territory dimensions on the recipient territory. Customer or partner inclusions and exclusions can also be inherited. The source and recipient territories can have different territory owners and can be placed in different hierarchies.

### Example

Here's an example of a prime salesperson and a shadow industry salesperson. Jane owns the Northern California territory and is responsible for selling all products to all customers located in Northern California. The source territory, Northern California, has this dimensional coverage:

- Products: Any

- Industry: Any
- Address: United States > California > Northern CA

Chris is part of the industry overlay organization and shadows Jane, but Chris is only responsible for high tech and manufacturing customers located in Northern California. The recipient territory, Northern California HT&M has this dimensional coverage:

- Products: Any
- Industry: High Tech, Manufacturing
- Address: United States > California > Northern CA

In the Northern California HT&M territory, the high tech and manufacturing industry dimensions are considered overrides.

#### *Related Topics*

- [Examples of Inherited Territory Coverage](#)

## Create a Territory Inheritance

You can set a territory as the source for the definitions of another territory. Then you only make changes in the one source territory, and the rest of the territories inherit the change.

1. Add a territory to a territory proposal to edit.
2. From the Actions menu, choose **Inherit > Edit Inheritance**.
3. Select the territory that contains coverage (dimensions or inclusions and exclusions, or both) that you want your proposed territory to inherit. Your territory inherits all coverage information from this source territory, unless you use overrides to change the coverage in the recipient. You can't have a chain of territory inheritances where territory B inherits from territory A, and B also is a source territory for territory C.

**CAUTION:** If you delete a source territory, the recipient territories aren't deleted, but automated updates to recipient territories stop.

4. Use dimensional overrides to modify what's inherited from the source.
5. Add or remove any coverage definitions to your proposed territory.
6. Activate your territory proposal.

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

#### *Related Topics*

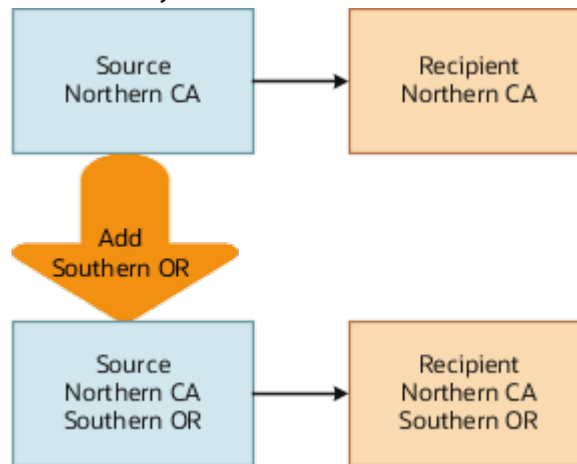
- [Examples of Inherited Territory Coverage](#)

## Changes to Source Territories

Create one territory as the source and let the shadowing territories inherit the dimension definitions from the one source. Then you only make changes in the one source territory, and the rest of the territories inherit the change.

This is an easy way to keep dimension definitions synchronized for a number of territories.

In this chart, the address dimension in the source territory is originally US > California > Northern CA. You add US > Oregon > Southern OR so the source territory includes both Northern CA and Southern OR. The recipient territories



automatically change to match.

## Update Recipients

After you make changes to a source territory, select the territory in the Territories table on the proposal. Go to the Actions menu and select **Inherit > Update Recipients**. The Territory Inheritance Recipient Update process makes changes to the recipient territories.

The default processing behavior uses the Maximum Number of Territories in Proposal parameter to 0 which uses a faster option to update active recipient territories without using proposals. This improves the performance when regenerating inheritance territories and minimizes the changes to recipient territories which is important for customers with large numbers of territories and complex territory definitions.

## What do I need to know about changing recipient territories?

When you create a recipient territory, you use dimensional overrides to make changes to the proposed territory.

You can also make changes to recipient territories in a proposal at a later time. To end the inheritance relationship, change the source territory field to none.

Use Scheduled Processes to run the Update Inheritance Recipients process to update all recipient territories. This includes your changes and any inherited definitions from source territories. You can select a source territory to update, or leave that parameter blank to run all territories. The Maximum Number of Territories in Proposal parameter is set to 0 for best performance. This is important if you have a large number of territories or complex territory definitions. If you want to use proposals to update recipients, you can specify the maximum number of territories per proposal. The maximum you can enter is 500. This process can also be scheduled to run periodically.

## Examples of Territories Defined by Geography

A common method of dividing sales territories is by geography.

## Countries

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

## Postal Codes

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

## Examples of Using Dimensional Coverage

Enable only the dimensions your organization requires for defining territories. These examples illustrate the use of different dimensions to assign customers, leads, and opportunity lines to the correct salespeople using defined territories.

### Account Type

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

### Customer Size

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

### Industry

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

### Product

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

### Sales Channel

You delegate customers that are small to partner sales organizations by address.

## Examples of Dimensional Territories

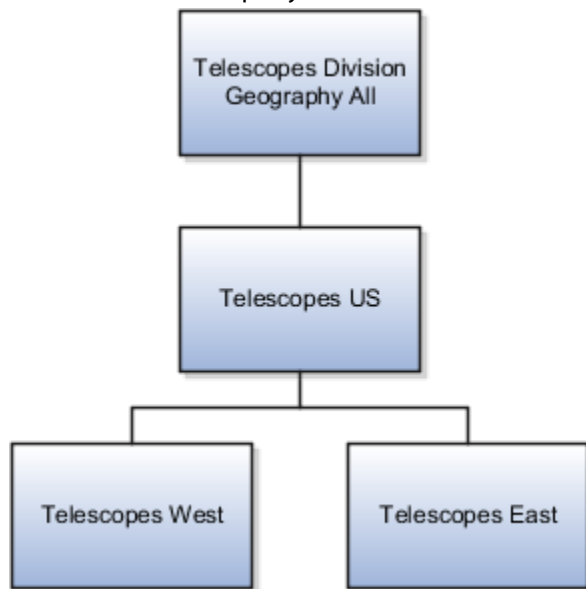
This scenario illustrates using a combination of different dimensions to define a new hierarchy of territories.



## Scenario

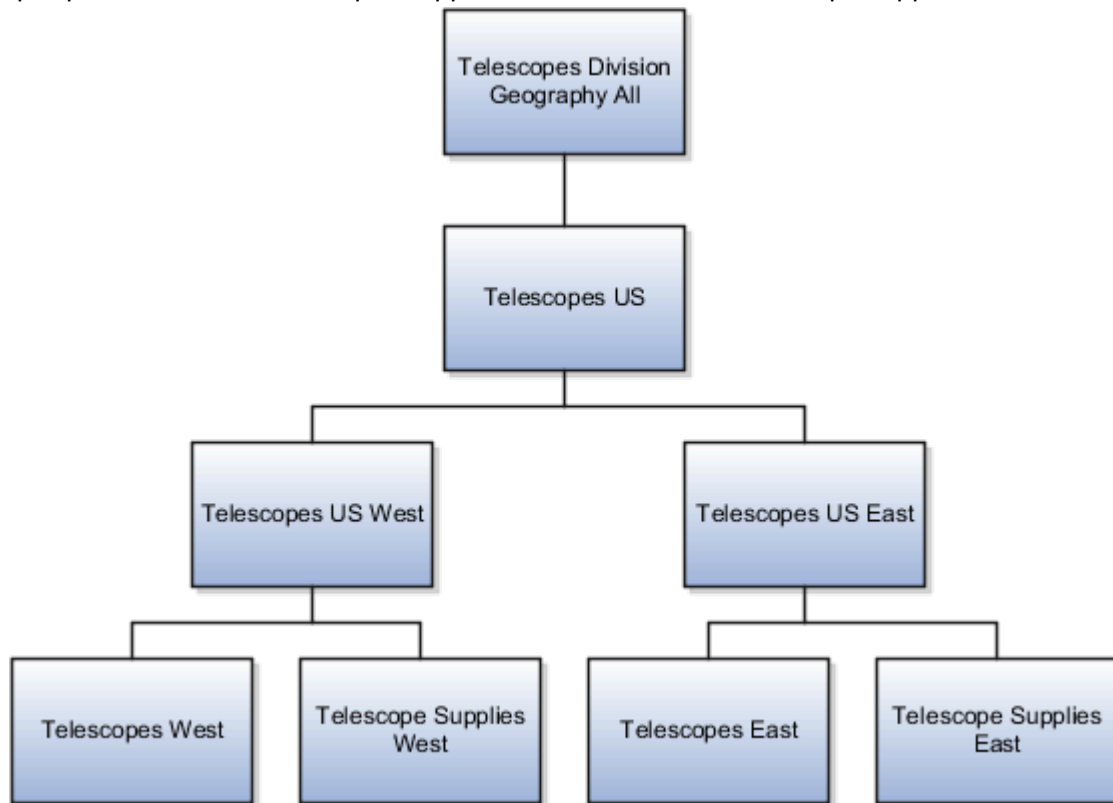
The telescope division of your company manufactures and sells a special type of microscope as well as related accessories and supplies. Your company recently started supplying microscopes to two large universities and several colleges in the East. Management wants to focus on expanding this new market by dedicating several salespeople to this industry, and by assigning individual universities to territories.

This chart shows the current territory hierarchy for the division, divided into East and West United States with a parent territory to catch any accounts outside the United States. All territories for the Telescopes Division of the company include in the definition the product group: telescopes, accessories, and supplies.



Selling telescopes requires salespeople with more knowledge and experience. Therefore, you separate telescope sales from sales of accessories and supplies within each US region. To accomplish this, you define the Telescopes territories

with the Telescopes product and the Telescopes Supplies territories with the Telescope Supplies and Accessories



product group.

The Telescopes East territory is defined with these dimensions:

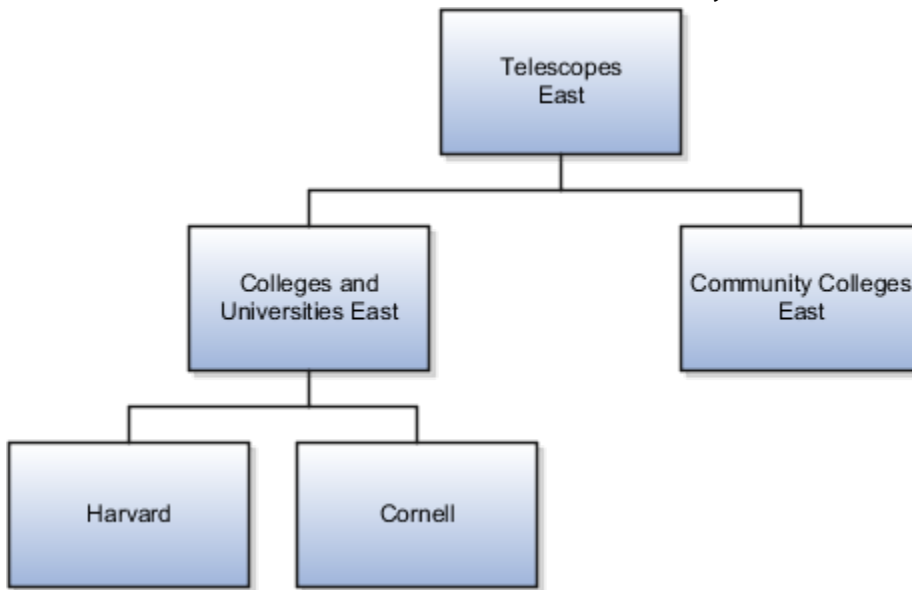
- Geography: East United States
- Product: Telescopes
- Industry: Any

The Telescope Supplies East territory is defined with these dimensions:

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

You add two child territories defined by Industry dimension members for 4-year colleges and universities, and 2-year colleges. Within the 4-year colleges and universities territory, you add the two

universities who are current customers as inclusions so they have dedicated salespeople to service them.



The Colleges and Universities East territory is defined with these dimensions:

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

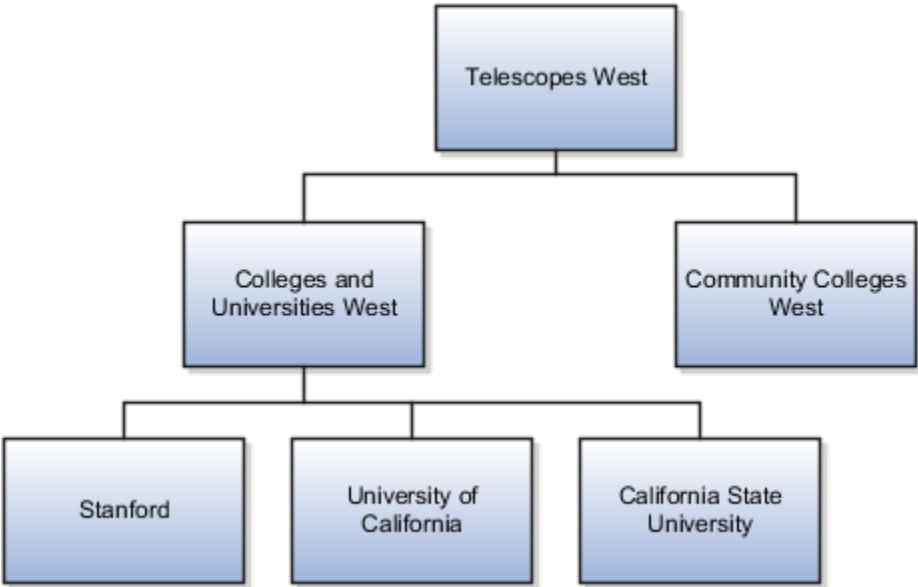
The Community Colleges East territory is defined with these dimensions:

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

Each university territory is defined with these dimensions:

- Included Customer: Harvard (for the Harvard territory)
- Included Customer: Cornell (for the Cornell territory)
- Other Dimensions, Product: Telescopes

You build the West United States territory hierarchy in the same way. Sales management identified three universities as named accounts even though they haven't yet purchased telescopes.



## Examples of Inherited Territory Coverage

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

Use overrides to change the dimensional coverage and other dimension information, and to qualify the included customers and their hierarchies to only those that match the override information.

In this example, the industry and product dimensions are enabled. This table provides the source territory definition.

| Coverage Type        | Definition | Details                      |
|----------------------|------------|------------------------------|
| Dimensional Coverage | Industry   | Any                          |
| Dimensional Coverage | Product    | Any                          |
| Included Customers   | Customer A | Is in the high tech industry |
| Included Customers   | Customer B | Is in the services industry  |
| Included Customers   | Customer C | Is in the utilities industry |
| Filtering Conditions | None       | None                         |
| Other Dimensions     | Product    | Desktops, Laptops            |

## Recipient Territory 1

The override for recipient territory 1 is *Industry: Services*.

Here's the resulting coverage for recipient territory 1.

| Coverage Type        | Definition | Details                                 |
|----------------------|------------|-----------------------------------------|
| Dimensional Coverage | Industry   | Services                                |
| Dimensional Coverage | Product    | Any                                     |
| Included Customers   | Customer A | Is in the high tech industry            |
| Included Customers   | Customer B | Is in the services industry             |
| Included Customers   | Customer C | Is in the utilities industry            |
| Filtering Conditions | Industry   | Services: Filters out Customers A and C |
| Other Dimensions     | Product    | Desktops, Laptops                       |

## Recipient Territory 2

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

Here's the resulting coverage for recipient territory 2.

| Coverage Type        | Definition | Details                                  |
|----------------------|------------|------------------------------------------|
| Dimensional Coverage | Industry   | High Tech                                |
| Dimensional Coverage | Product    | Any                                      |
| Included Customers   | Customer A | Is in the high tech industry             |
| Included Customers   | Customer B | Is in the services industry              |
| Included Customers   | Customer C | Is in the utilities industry             |
| Filtering Conditions | Industry   | High Tech: Filters out Customers B and C |
| Other Dimensions     | Product    | Desktops, Laptops                        |

## Recipient Territory 3

The override for recipient territory 3 is *Product: Laptops*.

Here's the resulting coverage for recipient territory 3.

| Coverage Type        | Definition | Details                      |
|----------------------|------------|------------------------------|
| Dimensional Coverage | Product    | Laptops                      |
| Dimensional Coverage | Industry   | Any                          |
| Included Customers   | Customer A | Is in the high tech industry |
| Included Customers   | Customer B | Is in the services industry  |
| Included Customers   | Customer C | Is in the utilities industry |
| Filtering Conditions | None       | None                         |
| Other Dimensions     | Product    | Laptops                      |

## Custom Access Groups

### Secure Territories Using Custom Access Groups

You can create custom rules for securing territories and proposals by custom access groups. For example, use custom rules to give country administrators view access to territories. But your sales operations team uses the provided security with full access to create and update territories.

The role-based security provides different access to different levels of the hierarchy. Custom Access Group data security is additive to the standard data security policies or predefined object sharing provided for each job and functional role. If your custom access group rules apply to users who aren't administrators, take care that you don't provide inappropriate access. Update, Delete, and Full access levels are available for sharing rules, but each one provides full access. If a user deletes a territory, all descendant territories are also deleted. Therefore, the user must have full access to all the territories to successfully delete the top territory.

**Note:** You can't create rules that use attributes of the child objects territory team, line of business, or coverage.

#### Related Topics

- [Types of Access Groups](#)

## Export and Import Management

### Overview of Using Import Management to Import Territories

You can use import management to create, update, or delete sales territory records.

When using Import Management you export a single compressed file containing the files for sales territories, sales territory resources, sales territory coverage, or sales territory lines of business. You can select whether to export one, all, or any combination of the territory objects. You import separate files for the territory objects: sales territory, sales territory resource, sales territory coverage, or sales territory line of business. Additionally, you need separate import files for creating (or updating), and for deleting records.

1. If you plan to import to a proposal, then create a proposal in the territory More Details UI.
2. Export active territories or export your proposal.
3. Map your source data to object attributes.
4. Complete your changes for one or more comma separated values (CSV) import files.
5. Create the import activity.
6. Review your import results.
7. Review and activate your proposal, if you're using one.

Always specify the user-friendly public unique identifiers when creating, updating or deleting territory records. Here are some examples.

- Sales Territory
  - UniqueTerritoryNumber
  - ProposalNumber
  - ParentTerritoryUniqueTerritoryNumber
  - OwnerResourceNumber
- Sales Territory Resource
  - UniqueTerritoryNumber
  - ResourcePartyNumber
- Sales Territory Coverage
  - UniqueTerritoryNumber
  - CoverageNumber
- Sales Territory Line of Business
  - UniqueTerritoryNumber
  - LOBCode

When you delete a territory using import, all the descendant territories are also deleted.

Create separate files for creating and for deleting Sales Territory Resource, Sales Territory Coverage, or Sales Territory Line of Business records.

**Tip:** Don't update records in the Sales Territory child objects. Instead, import to delete the record and then import to create the new record with the correct values.

## Create New Territories

You can create multiple levels of territories within a single Sales Territory import file. When you create a hierarchy of territories in single import file, enter a UniqueTerritoryNumber for your parent territory in the sales territory import file. Then you can use this same number as the ParentTerritoryUniqueTerritoryNumber of your child territories. Another reason to enter a UniqueTerritoryNumber is you can use the same UniqueTerritoryNumber in the child import files (sales territory resource, sales territory coverage, sales line of business). Here are other things to keep in mind:

- You must include the effective start date when you create an active territory.
- Include the Proposal Number when creating a new territory that's part of a proposal. It's a good idea to set the unique territory number to a combination of the Territory Number and the Proposal Number.
- When creating a new territory, the processing of the sales territory object import activity should complete prior to processing any of the sales territory child object (sales territory resource, sales territory coverage, sales territory line of business) import activities. The sales territory child object import activities can be processed in any order.

## File Size

Each import file has a limit for the number of records you're importing.

- Sales Territory 50,000
- Sales Territory Resource 50,000
- Sales Territory Lines of Business 50,000
- Sales Territory Coverage 500,000

## Coverage Tips

Here are some suggestions for your coverage data:

- To create the coverage Any for an individual dimension, don't include a row in the sales territory coverage file for that dimension.
- To create the coverage Any for ALL dimensions, include a row in the sales territory coverage file with the UniqueTerritoryNumber and the CoverageTypeCode. Leave all other columns blank.
- To create the coverage for a Customer Inclusion or Exclusion, the application attempts to look up the account using RegistryID, but if not found it uses OriginalReference. If values for both RegistryID and OriginalReference are passed, then the RegistryID is used first.

A Sales Territory Coverage record can be deleted using these fields:

- Unique territory number (UniqueTerritoryNumber): The public unique identifier number of the territory
- Coverage type code (CoverageTypeCode): Possible values are REGULAR, INCLUSION, or EXCLUSION
- Dimension code (TerrDimensionCode)
- Dimension Field: The value for the relevant dimension field representing the territory coverage record to delete.



### Dimension Codes and Fields

| Dimension         | Dimension Code | Dimension Field                                                                                                                                                                                                                                                                                                                                  |
|-------------------|----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sales Channel     | (None)         | Either SalesChannelCode or SubSalesChannelCode                                                                                                                                                                                                                                                                                                   |
| Product           | Prod           | ProductGroupNumber or ProductGroupId OR ItemNumber or InventoryItemId                                                                                                                                                                                                                                                                            |
| Account Type      | AccTp          | AccountTypeCode                                                                                                                                                                                                                                                                                                                                  |
| Address           | Addr           | <p>AddressCountry and (optionally) one or more of the following:</p> <p>AddressState</p> <p>AddressProvince</p> <p>AddressCounty</p> <p>AddressCity</p> <p>AddressPostalCode</p> <p>AddressElementAttribute1</p> <p>AddressElementAttribute2</p> <p>AddressElementAttribute3</p> <p>AddressElementAttribute4</p> <p>AddressElementAttribute5</p> |
| Auxiliary 3       | Aux3           | Auxiliary3Code                                                                                                                                                                                                                                                                                                                                   |
| Auxiliary 1       | Aux1           | Auxiliary1Code                                                                                                                                                                                                                                                                                                                                   |
| Auxiliary 2       | Aux2           | Auxiliary2Code                                                                                                                                                                                                                                                                                                                                   |
| Business Unit     | BUnit          | BusinessUnitName or BusinessUnitId                                                                                                                                                                                                                                                                                                               |
| Customer Size     | CSize          | CustomerSizeCode                                                                                                                                                                                                                                                                                                                                 |
| Geography         | Geo            | <p>GeographyId or GeographyName (the full path needs to be provided, for example &gt;United States&gt;CA or ~Global~North America)</p> <p>For Geo ranges, also provide GeographyHighId or GeoHighName. The full path needs to be provided (optional).</p>                                                                                        |
| Industry          | Indst          | IndustryCode                                                                                                                                                                                                                                                                                                                                     |
| Organization Size | OrgTp          | OrganizationTypeCode                                                                                                                                                                                                                                                                                                                             |
| Partner           | Prtnr          | PartnerNumber or PartnerId                                                                                                                                                                                                                                                                                                                       |
| Account           | Acct           | RegistryId or OriginalReference or AccountId                                                                                                                                                                                                                                                                                                     |

### Related Topics

- [Create the Territory Hierarchy Using Proposals](#)
- [Import Your Sales Territory Data](#)
- [Import Your Sales Territory Resource Data](#)
- [Import Your Sales Territory Coverage Data](#)
- [Import Your Sales Territory Line of Business Data](#)

## Export Territory Data

Use export to create CSV files that are ready for your changes. To export territory records to update, create, or delete, select the Language Independent Header option under Additional Options in the Export Activity.

### Use a Proposal

Do you want to import your territory data to a proposal so you can review it before activating?

- You can create a territory proposal in the territory More Details UI, and don't add any existing territories to it. Make a note of the proposal number to use when you import. You have nothing to export with an empty proposal.
- Create a territory proposal. Add to it territories you want to change or delete.

Use **Tools > Export Management** to export territories in your proposal. To export all territories within a proposal, use the filter criteria for the sales territory object: `ProposalNumber = 'XXXX'` (Replace XXXX with your proposal number.)

### Export Active Territories

Do you want to export your active territories, make changes, and import directly back to live territories? You only need the records you want to change, such as just a coverage change or a resource (team member) change. Use filters to restrict the records you export. Here are some examples:

- To export all active territories: Use the Filter Criteria for the Sales Territory object: `StatusCode = 'FINALIZED' AND EffectiveEndDate > '<today's date>'`. An example of the date format is '2019-11-19T00:00:00-00:00'
- To export all active territories owned by Lisa Jones: Use the Filter Criteria for the Sales Territory object: `StatusCode = 'FINALIZED' AND EffectiveEndDate > '<today's date>' AND Owner = 'Lisa Jones'`
- To export all active territories and coverage with the product Business Services: Use the Filter Criteria for the Sales Territory object: `StatusCode = 'FINALIZED' AND EffectiveEndDate > '<today's date>'`

Also use the Filter Criteria for the Sales Territory Coverage object: `ProductGroupName = 'Business Services'`

- To export all active territories and coverage with the included customer Pinnacle Technologies: Use the Filter Criteria for the Sales Territory object: `StatusCode = 'FINALIZED' AND EffectiveEndDate > '<today's date>'`

Also use the Filter Criteria for the Sales Territory Coverage object: `AccountName = 'Pinnacle Technologies'`

- To export all active territories and all industry dimension coverage: Use the Filter Criteria for the Sales Territory object: `StatusCode = 'FINALIZED' AND EffectiveEndDate > '<today's date>'`

Also use the Filter Criteria for the Sales Territory Coverage object: `DimensionName = 'Industry'`

**Tip:** If you renamed a dimension, then include both the `TerrDimensionCode` and `DimensionName` in the export of the sales territory coverage object. The `TerrDimensionCode` value is required when adding sales territory coverage records.

## Export a Territory Hierarchy

You can export an active or draft territory and all of its descendants, including territory team, coverage, and line of business information.

- Use the export filter criteria to specify the unique territory number for the top territory in your hierarchy to be exported. For example, `TerritoryHierarchyUniqueTerritoryNumber = 'CDRM_199'`
- If your hierarchy includes draft territories, then you must add the top territory in your hierarchy to a proposal first. Use the unique territory number generated in the proposal when you create the filter for export.
- To export only active territories, filter with the unique territory number plus the status code "finalized" and an effective end date greater than today. Here's an example: `TerritoryHierarchyUniqueTerritoryNumber = 'CDRM_199' AND StatusCode = 'FINALIZED' AND EffectiveEndDate > '2021-01-01T00:00:00-00:01'`

### Related Topics

- [What's the difference between unique territory number and territory number?](#)
- [How do I export data?](#)

## Create Import Templates for Territories

When you import territories, you use separate files for coverage, line of business, and territory team members. Coverage, line of business, and team members (resources) are part of the parent object sales territory.

You can create hierarchical import templates to group the files together the same way each time you import. The parent sales territory file is imported first, then the files for the child objects. A template also includes the import mode, such as to delete records.

## Create a Template

This example shows how to create a template for territories.

1. Navigate to **Tools > Import Management > Import Configuration > Manage Template > Create Template**.
2. On the **Create Template** page, name the template **Create and Update Territories and Coverage**.
3. Select the import object **Sales Territory**.
4. Click the **Import Object Hierarchy** link to select the object hierarchy.
5. Select the **Enabled** check box for each object to import. You can select the child objects under the parent hierarchy only after selecting the parent object.
6. Select the import mode **Update and create records**.
7. Save and close.
8. Refresh to see your new template.

## Suggested Templates

Create these templates to cover most of your future import needs.

**Note:** Don't use import templates to import territory coverage along with sales territories or resources.

| Template Name                          | Objects                                                                                  | Import Mode                                     |
|----------------------------------------|------------------------------------------------------------------------------------------|-------------------------------------------------|
| Create Territory and Team and Coverage | Sales Territory <ul style="list-style-type: none"><li>Sales Territory Resource</li></ul> | Create records, or<br>Update and create records |
| Update Territories                     | Sales Territory <ul style="list-style-type: none"><li>Sales Territory Resource</li></ul> | Update and create records                       |
| Add Territory Coverage                 | Sales Territory Coverage                                                                 | Create records                                  |
| Delete Territory                       | Sales Territory                                                                          | Delete records                                  |
| Delete Territory Resource              | Sales Territory Resource                                                                 | Delete records                                  |
| Delete Territory Coverage              | Sales Territory Coverage                                                                 | Delete records                                  |

#### Related Topics

- [Manage Hierarchical Import Templates](#)

## Import Approaches and Examples

### Territory Import Approaches

You have flexible options for updating territories either incrementally with updates and deletions or with full territory definitions. You can also use the territory proposal feature to group together updates and activate them only when ready. Here are some approaches you can take.

- Update active territories
  - Proposals aren't used
  - Make incremental territory changes:
    - In the sales territory import file: enter rows for each territory with an updated owner or details such as type or function
    - In the sales territory resource file: enter rows for each territory team member to be added or removed
    - In the sales territory coverage file: enter rows for each territory customer inclusion to be added, or postal code to be removed

For examples, see these topics:

- Change Active Territory Coverage Using Export and Import Management
  - Change an Active Territory Owner Using Export and Import Management
  - Add Customer Inclusions Using Import Management
  - Remove Customer Inclusions Using Import Management
- Update territories in a proposal where the original territory definition is included in the proposal
  - Add territories to be updated to a proposal
  - Make incremental updates only. For example, only dimension members to be removed or team members to be added are included in the import files
  - Use the unique territory numbers of the territories within the proposal in the import files
  - Activate the proposal after import

See the Update Territories with a Proposal Using Export and Import topic for an example.

- Import territories to a new proposal
  - Create a new territory proposal. Don't add territories to the proposal. The import process doesn't create a proposal for you.
  - You import the full territory definition. For example, the sales territory, sales territory team, sales territory coverage, sales territory line of business import files contain the complete definition of the territory
  - Include the proposal number when creating a new territory to be part of a proposal. It's a good idea to set the unique territory number to a combination of the territory number and the proposal number.
  - Activate the proposal after import

See the Update and Create Territories Using a New Proposal topic for an example.

- Create and delete territories in a hierarchy. See these example topics:
  - Create an Active Territory Hierarchy Using Import
  - Delete an Active Parent Territory Using Import Management
  - Create Parent and Child Territories With a Proposal Using Import
- Use import templates to group import files

See the Import Territories Using a Template topic for an example.

## Change Active Territory Coverage Using Export and Import Management

In this example, you have a territory called NA Sales Apps with several child territories. The coverage for some of these territories includes the product ERP Applications.

You want to change the product to Financial Applications. To do so, you can use the Export and Import Management to export the coverage file. Then import two coverage files to delete the unwanted coverage and create the new coverage.

### Export the Sales Territories and Sales Territory Coverage

1. Click **Navigator > Export Management**.
2. Click **Create Export Activity**.
3. Name the export **North America Product**.
4. In the **Object** field, select **Sales Territory**.  
The name of your export file appears in the File Name field.
5. Select the **Language Independent Header** check box.
6. Click **Next**.
7. Select Sales Territory to set these attributes and filter:
  - a. Change these fields in the Attributes region:
    - Move Unique Territory Number to Selected Fields and move it to the top.
    - Move Territory Name to the top.
  - b. Click **Filter Name** and create this filter to export active territory details as well as draft territory details, if they exist:
    - i. Find the **Name** field and click **Insert**.
    - ii. Enter `LIKE 'NA Sales Apps*'`.  
The child territory names all begin with NA Sales Apps.
    - iii. Click **Save and Close**.
8. The Sales Territory object is enabled. Select **Enabled** for the **Sales Territory Coverage** object.
9. Select Sales Territory Coverage and set these selected fields to be in this order:
  - a. Unique Territory Number
  - b. Territory Dimension Code
  - c. Dimension Name
  - d. Coverage Type Code
  - e. Product Group Name
  - f. Product Group Number
10. Click **Filter Name** and create this filter:
  - a. Find the **TerrDimensionCode** field name and click **Insert**.
  - b. Click the equals symbol.
  - c. Enter `'Prod'`.
  - d. Save and close.

11. Click **Next**.
12. Click **Submit**.

## Edit the Exported Files

When the export is successful, you extract the files and modify them.

1. In the compressed export file, find and open the Coverage .CSV file.
2. Edit the file and save it to a new file name as a delete file to delete every coverage.

| Name                  | Value                                                                      |
|-----------------------|----------------------------------------------------------------------------|
| File name             | Delete NA Sales ERP.csv                                                    |
| UniqueTerritoryNumber | Retain the value                                                           |
| CoverageTypeCode      | Retain the value, for example, REGULAR or INCLUSION                        |
| TerrDimensionCode     | Retain the value, for example, Prod                                        |
| ProductGroupName      | ERP Applications (Remove rows that don't contain this product group name.) |
| ProductGroupNumber    | 1-11E-262                                                                  |

**Note:** When you delete an existing territory coverage for the product dimension, you must include the Unique Territory Number, Coverage Type Code, Territory Dimension Code, and Product Group Number.

3. Open the original file, make these changes, and save it to add coverage.

| Name                  | Value                                               |
|-----------------------|-----------------------------------------------------|
| File name             | Add NA Sales Fin.csv                                |
| UniqueTerritoryNumber | Retain the value                                    |
| CoverageTypeCode      | Retain the value, for example, REGULAR or INCLUSION |
| TerrDimensionCode     | Retain the value, for example, Prod                 |
| ProductGroupName      | Change ERP Applications to FIN Applications         |
| ProductGroupNumber    | Change 1-11E-262 to 1-11E-156                       |

**Note:** When you create a new territory coverage for the product dimension, you must include the Unique Territory Number, Coverage Type Code, Territory Dimension Code, and Product Group Number.

## Import Your Changed Files

Import your delete file first to remove the existing incorrect coverage. Then import the add file to add the new coverage.

1. Click **Navigator > Import Management**.
2. In the Manage Imports page, click **Create Import Activity**.
3. In the Enter Import Options page, select or enter these options.

| Field Name  | Value                                 |
|-------------|---------------------------------------|
| Name        | Delete ERP Apps coverage for NA Sales |
| Object      | Sales Territory Coverage              |
| File Name   | Delete NA Sales ERP.csv               |
| Import Mode | Delete records                        |

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.
7. In the Manage Imports page, click **Create Import Activity** to import your coverage additions..
8. In the Enter Import Options page, select or enter these options.

| Field Name  | Value                                 |
|-------------|---------------------------------------|
| Name        | Create ERP Apps coverage for NA Sales |
| Object      | Sales Territory Coverage              |
| File Name   | Add NA Sales Fin.csv                  |
| Import Mode | Create records                        |

9. Click **Next**.
10. In the Map Fields page, click **Next**.
11. Click **Submit**.
12. Verify that both of your imports completed.

Your changes are available in your active territories. Review the NA Sales Applications hierarchy and verify the changed Product dimension coverage.



# Change an Active Territory Owner Using Export and Import Management

In this example, you have a territory called NA Sales Apps with several child territories. NA Sales Apps SouthWest and NA Sales Apps West are owned by John Dooley, and NA Sales Apps West Central is owned by Joe Hill.

John Dooley recently left the sales organization, so temporarily, his colleague, Joe Hill will be taking over John's territories. You can make this change without using a proposal or updating the whole territory definition.

## Export the Sales Territories

1. Click **Navigator > Export Management**.
2. Click **Create Export Activity**.
3. Name the export **North America Product**.
4. In the **Object** field, select **Sales Territory**.

The name of your export file appears in the File Name field.

5. Select the **Language Independent Header** check box.
6. Click **Next**.
7. The Sales Territory object is enabled. Select **Enabled** for the **Sales Territory Coverage** object.
8. Select Sales Territory to set these attributes and filter:
  - a. Change these fields in the Attributes region and select the following order:
    - i. Unique Territory Number
    - ii. Territory Number
    - iii. Territory Name
    - iv. Owner Registry ID
    - v. Owner(Trans)
  - b. Click **Filter Name** and create this filter:

**Note:** You can select a previous filter with this criteria instead of recreating it.

- i. Find the **Name** field and click **Insert**.
- ii. Enter `LIKE 'NA Sales Apps*'`.

The child territory names all begin with NA Sales Apps.

- iii. Click **Save and Close**.
9. Click **Next**.
10. Click **Submit**.

## Edit the Exported Files

When the export is successful, you extract the files and modify them.

1. In the compressed export file, find and open the Coverage.CSV file.

2. Open the original file and make these changes:

| Name                | Territory Name          | Value            |
|---------------------|-------------------------|------------------|
| File name           | NA                      | Change Owner.csv |
| OwnerResourceNumber | NA Sales Apps West      | 1855             |
| OwnerTrans          | NA Sales Apps West      | Joe Hill         |
| OwnerResourceNumber | NA Sales Apps Southwest | 1855             |
| OwnerTrans          | NA Sales Apps Southwest | Joe Hill         |

3. Remove Joe Hill's NA Sales Apps West Central territory, because it needs no updates.
4. Save the file.

## Import Your Changed Files

Import your delete file first to change the owner of the two territories.

1. Click **Navigator > Import Management**.
2. In the Manage Imports page, click **Create Import Activity**.
3. In the Enter Import Options page, select or enter these options.

| Field Name  | Value                     |
|-------------|---------------------------|
| Name        | Change Territory Owner    |
| Object      | Sales Territory           |
| File Name   | Change Owner.csv          |
| Import Mode | Update and create records |

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.
7. Verify that your import completed.

Your changes are available in your active territories. Review the NA Sales Applications hierarchy and verify the changed territory owners.

## Add Customer Inclusions Using Import Management

In this example, you create an import file and import two customer inclusions to the NA Sales territory:

- One for the account Pinnacle Technologies without the hierarchy, using the Registry ID information
- On for the account Apex Systems with the hierarchy, using the Original Reference information.

Create your import file and name it Add Customer Inclusions NA Sales.csv.

| Field Name            | Value 1         | Value 2          |
|-----------------------|-----------------|------------------|
| UniqueTerritoryNumber | CDRM_380        | CDRM_380         |
| CoverageTypeCode      | INCLUSION       | INCLUSION        |
| TerrDimensionCode     | Acct            | Acct             |
| RegistryId            | 999997569264400 | (empty cell)     |
| OriginalReference     | (empty cell)    | DNB~638392020043 |
| IncludeHierarchyFlag  | N               | Y                |

You can add the **AccountName** column to include your customer names. The column isn't used during the import of customer inclusions.

### Import Your File to Active Territories

Import your file.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

| Field Name  | Value                                |
|-------------|--------------------------------------|
| Name        | Add Customer Inclusions NA Sales     |
| Object      | Sales Territory Coverage             |
| File Name   | Add Customer Inclusions NA Sales.csv |
| Import Mode | Create records                       |

| Field Name | Value |
|------------|-------|
|            |       |

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.
7. Verify that the import activity completed successfully.

Your changes are available in your active territories. Review the NA Sales territory and verify the new customer inclusions.

## Remove Customer Inclusions Using Import Management

In this example, you create an import file to remove the customer inclusion record for the account Pinnacle Technologies from the NA Sales territory.

Use Export Management to locate the Coverage Number value for the sales territory coverage customer inclusion record for the account Pinnacle Technologies from the NA Sales territory. Create an import file to remove this customer inclusion and name it Remove Customer Inclusions NA Sales.csv.

| Field Name                                                                 | Value     |
|----------------------------------------------------------------------------|-----------|
| UniqueTerritoryNumber                                                      | CDRM_380  |
| CoverageTypeCode                                                           | INCLUSION |
| TerrDimensionCode                                                          | Acct      |
| RegistryID                                                                 | CDRM_1352 |
| <b>Note:</b> The OriginalReference or AccountID value can be used instead. |           |

## Import Your File to Active Territories

Import your file.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

| Field Name | Value                               |
|------------|-------------------------------------|
| Name       | Remove Customer Inclusions NA Sales |
| Object     | Sales Territory Coverage            |

| Field Name  | Value                                   |
|-------------|-----------------------------------------|
|             |                                         |
| File Name   | Remove Customer Inclusions NA Sales.csv |
| Import Mode | Delete records                          |

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.
7. Verify that the import activity completed successfully.

Your changes are available in your active territories. Review the NA Sales territory and verify the customer inclusion no longer exists.

## Update Territories With a Proposal Using Export and Import

In this example, you have a territory called NA Direct Sales Apps with several child territories. The coverage for some of these territories includes the Customer Size Small. You want to change the Customer Size to Large.

You will also update the territory function to Sales Support. To do so, you can use Export and Import Management to incrementally update the sales territories. You export the sales territory and sales territory coverage files, and then import a coverage file to delete the unwanted coverage and import a coverage file to create the new coverage, and a sales territory import file to update the territory function.

Here's the process followed in this example.

1. Create a proposal and add the individual territories to be updated to the proposal.
2. Use Export Management to export all territories in that proposal.
3. Use the Export Management Activity filter criteria (proposal number) to export the sales territories that need to be updated. Include two objects: sales territory and sales territory coverage.
4. Edit your files for import. This approach uses a proposal to perform incremental updates to the territories, so you include only the territory records that require updates to the territory function in the sales territory import file. You include only the Small Customer Size territory coverage records to be removed in the DELETE sales territory coverage import file. You include only the Customer Size Large territory coverage records to be added in the CREATE sales territory coverage import file.
5. Import your changed files.
6. Review your proposal and activate it.

### Create a Proposal

Create the proposal and add territories to be updated.

1. Navigate to **Sales > Territories**
2. Click the Sales Territories Hierarchy tab.
3. Click **Manage Proposals**.
4. Click **Create**.
5. Name the proposal **NA Direct Sales Apps Territory Export Proposal**.
6. Click **Save and View**.
7. Search for territories with a name that starts with NA Direct Sales Apps.

8. Select **NA Direct Sales**.
9. Click **View in Hierarchy**.
10. Expand the hierarchy and add these territories to the proposal:
  - o NA Central region
  - o NA Eastern region
  - o NA Western region
11. Note down the number for the proposal from the Details section.
12. Click **Done** twice.

## Export Sales Territory and Coverage Files

1. Navigate to **Export Management**.
2. Click **Create Export Activity**.
3. Name the export **Territory Export Proposal**.
4. In the **Object** field, select **Sales Territory**.

The name of your export file appears in the File Name field.
5. Under Advance Options, select **Language Independent Header**.
6. Click **Next**.
7. The Sales Territory object is enabled. Enable the Sales Territory Coverage object.
8. Select **Sales Territory** to set these attributes and filter:
  - a. Select these fields in the Attributes region:
    - Move **Unique Territory Number** to Selected Fields and move it to the top.
    - Proposal Number
    - Territory Number
    - Territory Name
    - Territory Function
  - b. Click **Filter Name** and create this filter:
    - i. Find the Proposal Number field and click **Insert**.
    - ii. Click the equals symbol.
    - iii. Enter your proposal number in single quotes.
    - iv. Save and close.
9. Select Sales Territory Coverage and set these selected fields to be in this order:
  - a. Coverage Number
  - b. Unique Territory Number
  - c. Coverage Type Code
  - d. Territory Dimension Code
  - e. Customer Size Code
10. Click **Filter Name** and create this filter:
  - a. Find the **TerrDimensionCode** field name and click **Insert**.
  - b. Click the equals symbol.
  - c. Enter 'csize'.
  - d. Save and close.

11. Click **Next**.
12. Click **Submit**.

## Edit the Exported Files

When the export is successful, you extract the files and modify them to create three import files, one for sales territory and two for sales territory coverage.

1. In the compressed export file, find and open the territory CSV file.
2. Edit the file rows:

| Unique Territory Number | Proposal Number         | Territory Name                             | Territory Function                              |
|-------------------------|-------------------------|--------------------------------------------|-------------------------------------------------|
| Leave value as exported | Leave value as exported | Leave value as exported: NA Central region | Add the territory function value: SALES_SUPPORT |
| Leave value as exported | Leave value as exported | Leave value as exported: NA Eastern region | Add the territory function value: SALES_SUPPORT |
| Leave value as exported | Leave value as exported | Leave value as exported: NA Western region | Add the territory function value: SALES_SUPPORT |

3. Save to a new file name: Update NA Direct Sales Apps child territories.csv.
4. In the compressed export file, find and open the sales territory coverage CSV file.
5. Edit the file:

| Coverage Number         | Unique Territory Number | Coverage Type Code      | Territory Dimension Code | Customer Size Code      |
|-------------------------|-------------------------|-------------------------|--------------------------|-------------------------|
| Leave value as exported | Leave value as exported | Leave value as exported | Leave value as exported  | Leave value as exported |
| Leave value as exported | Leave value as exported | Leave value as exported | Leave value as exported  | Leave value as exported |
| Leave value as exported | Leave value as exported | Leave value as exported | Leave value as exported  | Leave value as exported |

6. save it to a new file name to **delete** a coverage: Delete NA Direct Sales child territories coverage.csv.
7. In the compressed export file, find and open the sales territory coverage CSV file.
8. Edit the file:

| Coverage Number | Unique Territory Number | Coverage Type Code    | Territory Dimension Code | Customer Size Code |
|-----------------|-------------------------|-----------------------|--------------------------|--------------------|
| Clear value     | Leave value as exported | SALES_ACCOUNT_CENTRIC | CSize                    | LARGE              |

| Coverage Number | Unique Territory Number | Coverage Type Code    | Territory Dimension Code | Customer Size Code |
|-----------------|-------------------------|-----------------------|--------------------------|--------------------|
| Clear value     | Leave value as exported | SALES_ACCOUNT_CENTRIC | CSize                    | LARGE              |
| Clear value     | Leave value as exported | SALES_ACCOUNT_CENTRIC | CSize                    | LARGE              |

9. save it to a new file name to **create** a coverage: Create NA Direct Sales child territories coverage.csv.

## Import Your Files

Import your territory file.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

| Field Name  | Value                                             |
|-------------|---------------------------------------------------|
| Name        | Update NA Direct Sales Child Territories          |
| Object      | Sales Territory                                   |
| File Name   | Update NA Direct Sales Apps child territories.csv |
| Import Mode | Update and insert records                         |

4. Click **Next**.
5. In the Map Fields page, click **Next**
6. Click **Submit**.

To import the sales territory coverage delete file:

1. In the Manage Imports page, click **Create Import Activity**.
2. Enter these options.

| Field Name | Value                                           |
|------------|-------------------------------------------------|
| Name       | Delete NA Direct Sales child territory coverage |
| Object     | Sales Territory Coverage                        |



| Field Name  | Value                                                 |
|-------------|-------------------------------------------------------|
| File Name   | Delete NA Direct Sales child territories coverage.csv |
| Import Mode | Delete records                                        |

3. Click **Next**.
4. In the Map Fields page, click **Next**.
5. Click **Submit**.

To import the sales territory coverage files:

1. In the Manage Imports page, click **Create Import Activity**.
2. Enter these options.

| Field Name  | Value                                                 |
|-------------|-------------------------------------------------------|
| Name        | Create NA Direct Sales child territory coverage       |
| Object      | Sales Territory Coverage                              |
| File Name   | Create NA Direct Sales child territories coverage.csv |
| Import Mode | Create records                                        |

3. Click **Next**.
4. In the Map Fields page, click **Next**.
5. Click **Submit**.

Verify that your imports completed successfully.

## Review Your Imported Territories and Activate the Proposal

Check your imported territories before you activate your proposal.

1. Navigate to **Sales > Territories**.
2. Click **More Details**.
3. Click **Manage Proposals**.
4. Click the **Territory Export Proposal**.
  - a. Search for the territories in the proposal, such as NA Central and view them in the hierarchy.
  - b. Show dimensions and confirm the customer size is correct.
  - c. Confirm your changed territory function.
5. Click **Activate**.
6. If you get a warning about the activation date, click **Yes**.
7. Use Refresh to monitor the progress of the activation process. On completion the proposal appears in the Completed Proposals list.

Your changes are available in your active territories.

## Update and Create Territories Using a New Proposal

In this example, you have a territory called NA Direct Sales Apps with several child territories. The coverage for some of these territories (NA Central region, NA Eastern region, NA Western region) includes the customer size Small.

You want to change the customer size to Large, and update the territory function to Sales Support. You also want to create a new territory named NA Not 48 Region and owned by Alex Smith to cover large, direct customers in Hawaii and Alaska. Perform these steps:

1. Create a new proposal. Don't add territories to this proposal. Your import won't automatically create a proposal.
2. Import complete definitions of each territory to be created or updated.
3. Activate the territory proposal.

### Create a New Empty Proposal

1. Navigate to **Sales > Territories**.
2. Click the Sales Territories Hierarchy tab.
3. Click **Manage Proposals**.
4. Click **Create**.
5. Name the proposal **Update and Create Territories Proposal**.
6. Click **Save and View**.
7. Expand the Details section and note down the proposal number. In this example it's **CDRM\_47012**.
8. Click **Done** twice.

### Create the Sales Territory Import File

1. Open an existing exported territory CSV file or create a new file.
2. Save this example file as **Update and Create NA Direct Sales child territories in new proposal.csv**.
3. Remove all rows for other territories from your export file.
4. Enter a row for each new or updated territory. If you're updating a territory, create the unique territory number by using the proposal number, hyphen, territory number. If you leave the territory number blank for the application to create, then enter the unique territory number using the correct proposal number-hyphen-a unique made-up number.

| UniqueTerri            | ProposalNu     | TerritoryNu | Name                 | TypeCode | CoverageMo                    | TerritoryFu       | OwnerReso | OwnerTrans        | ParentUnique    |
|------------------------|----------------|-------------|----------------------|----------|-------------------------------|-------------------|-----------|-------------------|-----------------|
|                        |                |             |                      |          |                               | Code              | Number    |                   | TerritoryNumber |
| CDRM_47012<br>CDRM_122 | CDRM_<br>47012 | CDRM_122    | NA Central<br>region | PRIME    | SALES_<br>ACCOUNT_<br>CENTRIC | SALES_<br>SUPPORT | 9147      | Michael<br>Rogers | CDRM_249        |
| CDRM_47012<br>CDRM_451 | CDRM_<br>47012 | CDRM_451    | NA Eastern<br>region | PRIME    | SALES_<br>ACCOUNT_<br>CENTRIC | SALES_<br>SUPPORT | 9147      | Michael<br>Rogers | CDRM_249        |

| UniqueTerritoryNumber    | ProposalNumber | TerritoryNumber                                                                                                  | Name              | TypeCode | CoverageModel         | TerritoryFullCode | OwnerResourceNumber | OwnerTerritory | ParentUniqueTerritoryNumber |
|--------------------------|----------------|------------------------------------------------------------------------------------------------------------------|-------------------|----------|-----------------------|-------------------|---------------------|----------------|-----------------------------|
| CDRM_4701-<br>CDRM_318   | CDRM_47012     | CDRM_318                                                                                                         | NA Western region | PRIME    | SALES_ACCOUNT_CENTRIC | SALES_SUPPORT     | 5110                | Alex Smith     | CDRM_249                    |
| CDRM_4701-<br>CDRM_47012 | CDRM_47012     | Leave blank (the application allocates a territory number) or enter a unique territory number, for example 12539 | NA Not 48 region  | PRIME    | SALES_ACCOUNT_CENTRIC | SALES_SUPPORT     | 5110                | Alex Smith     | CDRM_249                    |

## Create the Sales Territory Coverage Import File

1. Open an existing exported territory coverage CSV file or create a new file.
2. Save this example file as **Update and Create NA Direct Sales child territory coverage in new proposal.csv**.
3. Remove all rows for other territories from your export file.
4. Enter coverage rows as needed for each new or updated territory. Copy the unique territory numbers from your territory import file. Cells in this table containing N/A should have no entries in your import file.

| UniqueTerritoryNumber   | TerrDimensionCode | CoverageTypeCode | CustomerSizeCode | SalesChannelCode         | GeographyName                                      |
|-------------------------|-------------------|------------------|------------------|--------------------------|----------------------------------------------------|
| CDRM_47012-<br>CDRM_122 | Schn1             | REGULAR          | N/A              | ZPM_DIRECT_CHANNEL_TYPES | N/A                                                |
| CDRM_47012-<br>CDRM_122 | Geo               | REGULAR          | N/A              | N/A                      | ~GLOBAL~North American Sales~United States~Midwest |
| CDRM_47012-<br>CDRM_122 | Geo               | REGULAR          | N/A              | N/A                      | ~GLOBAL~North American Sales~United States~South   |
| CDRM_47012-<br>CDRM_122 | CSize             | REGULAR          | LARGE            | N/A                      | N/A                                                |

| UniqueTerritoryNum       | TerrDimensionCode | CoverageTypeCode | CustomerSizeCode | SalesChannelCode             | GeographyName                                                       |
|--------------------------|-------------------|------------------|------------------|------------------------------|---------------------------------------------------------------------|
|                          |                   |                  |                  |                              |                                                                     |
| CDRM_47012-<br>CDRM_318  | SChn1             | REGULAR          | N/A              | ZPM_DIRECT_<br>CHANNEL_TYPES | N/A                                                                 |
| CDRM_47012-<br>CDRM_318  | Geo               | REGULAR          | N/A              | N/A                          | ~GLOBAL~North<br>American<br>Sales~United<br>States~West            |
| CDRM_47012-<br>CDRM_318  | CSize             | REGULAR          | LARGE            | N/A                          | N/A                                                                 |
| CDRM_47012-<br>CDRM_451  | SChn1             | REGULAR          | N/A              | ZPM_DIRECT_<br>CHANNEL_TYPES | N/A                                                                 |
| CDRM_47012-<br>CDRM_451  | Geo               | REGULAR          | N/A              | N/A                          | ~GLOBAL~North<br>American<br>Sales~United<br>States~Northeast       |
| CDRM_47012-<br>CDRM_451  | CSize             | REGULAR          | LARGE            | N/A                          | N/A                                                                 |
| CDRM_47012-<br>CDRM_1234 | SChn1             | REGULAR          | N/A              | ZPM_DIRECT_<br>CHANNEL_TYPES | N/A                                                                 |
| CDRM_47012-<br>CDRM_1234 | Geo               | REGULAR          | N/A              | N/A                          | ~GLOBAL~North<br>American<br>Sales~United<br>States~West~Pacific~AK |
| CDRM_47012-<br>CDRM_1234 | Geo               | REGULAR          | N/A              | N/A                          | ~GLOBAL~North<br>American<br>Sales~United<br>States~West~Pacific~HI |
| CDRM_47012-<br>CDRM_451  | CSize             | REGULAR          | LARGE            | N/A                          | N/A                                                                 |

## Import Your Files

Import your territory file and your coverage file.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

| Field Name  | Value                                                                   |
|-------------|-------------------------------------------------------------------------|
| Name        | Update and Create NA Direct Sales child territories                     |
| Object      | Sales Territory                                                         |
| File Name   | Update and Create NA Direct Sales child territories in new proposal.CSV |
| Import Mode | Update and insert records                                               |

4. Click **Next**.
5. In the Map Fields page, review the mappings. Optionally apply a specific mapping, or click **Save as** to save the mapping or map any unmapped fields.
6. Click **Next**.
7. Click **Submit**.

To import the sales territory coverage file:

1. In the Manage Imports page, click **Create Import Activity**.
2. Enter these options.

| Field Name  | Value                                                                          |
|-------------|--------------------------------------------------------------------------------|
| Name        | Update and Create NA Direct Sales child territory coverage                     |
| Object      | Sales Territory Coverage                                                       |
| File Name   | Update and Create NA Direct Sales child territory coverage in new proposal.CSV |
| Import Mode | Update and insert records                                                      |

3. Click **Next**.
4. In the Map Fields page, review the mappings. Optionally apply a specific mapping, or click **Save as** to save the mapping or map any unmapped fields.
5. Click **Next**.

6. Click **Submit**.
7. Verify that all of your imports completed successfully.

## Review Your Imported Territories and Activate the Proposal

Check your imported territories before you activate your proposal.

1. Navigate to **Sales > Territories**.
2. Click **More Details**.
3. Click **Manage Proposals**.
4. Click the **Territory Export Proposal**.
5. Find your added or changed territories and verify the coverage.
6. Click **Activate**.
7. If you get a warning about the activation date, click **Yes**.
8. Use Refresh to monitor the progress of the activation process. On completion the proposal appears in the Completed Proposals list.

Your changes are available in your active territories.

## Create an Active Territory Hierarchy Using Import

In this example, you create an active territory and active child territory, each with an owner and dimensional coverage. The parent territory is for a sales manager, and a child territory for a salesperson, under the NA Diagnostics territory branch owned by Kerry Evans.

### Create Your Import Files

You need this information to start:

- Parent Territory NA Diagnostics has the unique number: 26088
- Salesperson Lisa Jones has the resource registry ID: 15
- Sales Manager Mateo Lopez has the resource registry ID: 16534

You can save a copy of an exported Sales Territory and an exported Sales Territory Coverage file to use as templates for the import files.

1. Open an exported Sales Territory CSV file.
2. Replace the field values with these territory definitions:

| UniqueTerrito | TerritoryNumb | CoverageMod           | Name                       | StatusCode | TypeCode | ParentUniqueTerritoryNumb | OwnerResourceNumber | Description                                               |
|---------------|---------------|-----------------------|----------------------------|------------|----------|---------------------------|---------------------|-----------------------------------------------------------|
| JC1234        | (Leave blank) | SALES_ACCOUNT_CENTRIC | NA Diagnostics - San Mateo | FINALIZED  | PRIME    | 26088                     | 16534               | Large Customers in San Mateo County - Diagnostic products |

| UniqueTerrito | TerritoryNurr | CoverageMoc                   | Name                              | StatusCode | TypeCode | ParentUnique<br>TerritoryNurr | OwnerResou<br>Number | Description                                                                  |
|---------------|---------------|-------------------------------|-----------------------------------|------------|----------|-------------------------------|----------------------|------------------------------------------------------------------------------|
| JC5678        | (Leave blank) | SALES_<br>ACCOUNT_<br>CENTRIC | NA<br>Diagnostics -<br>SC and RWC | FINALIZED  | PRIME    | JCT1234                       | 15                   | Large<br>Customers<br>in Cities San<br>Francisco -<br>Diagnostic<br>products |

3. Save the file to the new file name Active Parent and Child Territory Import.csv.
4. Open an exported Sales Territory coverage CSV file.
5. Replace the field values with these values for Mateo's territory coverage:

| UniqueTerrito | TerrDimensio | CoverageType | ProductGroup  | ProductGroup  | CustomerSize  | AddressCoun   | AddressCoun   | AddressCity   |
|---------------|--------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|
| JC1234        | Prod         | REGULAR      | 30000009594   | Diagnostics   | (Leave blank) | (Leave blank) | (Leave blank) | (Leave blank) |
| JC1234        | CSize        | REGULAR      | (Leave blank) | (Leave blank) | LS_LARGE      | (Leave blank) | (Leave blank) | (Leave blank) |
| JC1234        | Addr         | REGULAR      | (Leave blank) | (Leave blank) | (Leave blank) | US            | San Mateo     | (Leave blank) |

6. Add values for Lisa's territory coverage to the same file:

| UniqueTerrito | TerrDimensio | CoverageType | ProductGroup  | ProductGroup  | CustomerSize  | AddressCoun   | AddressCoun   | AddressCity      |
|---------------|--------------|--------------|---------------|---------------|---------------|---------------|---------------|------------------|
| JC5678        | Prod         | REGULAR      | 30000009594   | Diagnostics   | (Leave blank) | (Leave blank) | (Leave blank) | (Leave blank)    |
| JC5678        | CSize        | REGULAR      | (Leave blank) | (Leave blank) | LS_LARGE      | (Leave blank) | (Leave blank) | (Leave blank)    |
| JC5678        | Addr         | REGULAR      | (Leave blank) | (Leave blank) | (Leave blank) | US            | (Leave blank) | San<br>Francisco |

7. Save the file to the new file name Active Parent and Child Territory Coverage Import.csv.

## Import Your Files for Active Territories

Import the sales territory file first to create the parent and child territories. Then import the sales territory coverage file to add the new coverage for both territories.

1. Navigate to Import Management.
2. Click **Create Import Activity**.

**3.** Enter these options.

| Field Name  | Value                                        |
|-------------|----------------------------------------------|
| Name        | Import Parent and Child Territory            |
| Object      | Sales Territory                              |
| File Name   | Active Parent and Child Territory Import.csv |
| Import Mode | Update and create records                    |

- 4.** Click **Next**.
- 5.** In the Map Fields page, click **Next**.
- 6.** Click **Submit**.
- 7.** Verify that the import activity completed successfully.

Next, import the sales territory coverage file:

- 1.** In the Manage Imports page, click **Create Import Activity**.
- 2.** Enter these options.

| Field Name  | Value                                          |
|-------------|------------------------------------------------|
| Name        | Import Parent and Child Territory Coverage     |
| Object      | Sales Territory Coverage                       |
| File Name   | Active Parent and Child Territory Coverage.csv |
| Import Mode | Update and create records                      |

- 3.** Click **Next**.
- 4.** Click **Next**.
- 5.** Click **Submit**.
- 6.** Verify that your import completed successfully.

## Delete an Active Parent Territory Using Import Management

In this example, you want to delete a parent territory (NAM Parent Territory which covers the countries in North America, and its three child territories which cover United States, Canada, and Mexico).



You achieve this by creating a sales territory import file that contains the unique territory number of the parent territory you want to delete. All child territories are also deleted during import.

1. Create your comma separated delimiter file that contains the column name **UniqueTerritoryNumber** and the value of the unique territory number of the NAM parent territory.
2. Click **Navigator > Import Management**.
3. In the Manage Imports page, click **Create Import Activity**.
4. In the Enter Import Options page, select or enter these options.

| Field Name  | Value                           |
|-------------|---------------------------------|
| Name        | Delete NAM Parent Territory     |
| Object      | Sales Territory                 |
| File Name   | Delete NAM Parent Territory.csv |
| Import Mode | Delete records                  |

5. Click **Next**.
6. In the Map Fields page, click **Next**.
7. Click **Submit**.
8. Verify that the import activity completed.
9. Go to your active territories and confirm that the parent and child territories are gone.

## Import Territories Using a Template

Your import template includes the hierarchy, if needed, of the territory object as the parent and the child objects coverage, line of business, and sales team (resources). In this example, you have three files to import:

1. Update NA Direct Sales child territories.csv
2. Delete NA Direct Sales child territories coverage.csv
3. Create NA Direct Sales child territories coverage.csv

### Import Using Hierarchical Import Template Files

Import the delete coverage file first to remove existing incorrect coverage. You can import it directly or use the Delete Territory Coverage template recommended in the Create Templates for Territory Imports topic.

1. Navigate to **Tools > Import Management > Import from Template**.  
The **Template Summary** section shows the list of available templates for use, along with the top-level import object. When you select a template, the **Hierarchy Objects** section shows the object hierarchy for the template.
2. Select the **Create Territory and Team and Coverage** template and click **Continue with Template**. On the **Enter Import Options** page, your object hierarchy is preselected and the advanced import configurations are already selected for you. If required, you can change these configurations for your import.
3. Click **Choose File** for the Sales Territory object and select the Update NA Direct Sales child territories.csv file.

4. Click **Choose File** for the Sales Territory Coverage object and select the Create NA Direct Sales child territories coverage.csv file.
5. Click **Next**.
6. In the **Sales Territory Map Fields** page, review the mappings. Optionally apply a specific mapping, or click **Save as** to save the mapping or map any unmapped fields.
7. Click the Sales Territory Coverage subtab to review mappings. Optionally apply a specific mapping, or click **Save as** to save the mapping or map any unmapped fields.
8. Click **Next**.
9. Review your import details on the **Review and Submit** page, and submit.
10. Verify that all of your imports completed successfully.

#### Related Topics

- [Create Import Templates for Territories](#)
- [Manage Hierarchical Import Templates](#)

## Create Parent and Child Territories with a Proposal Using Import

In this example, you create a territory and child territory, each with an owner and dimensional coverage. You import the territories to an empty proposal and then activate the proposal.

The parent territory is for a sales manager, and a child territory for a salesperson, under the NA Diagnostics territory branch owned by Kerry Evans. The sales manager territory is owned by Mateo Lopez and the child territory is owned by Lisa Jones.

You can create multiple levels of territories within a single Sales Territory import file. When you create a hierarchy of territories in a single import file, enter a UniqueTerritoryNumber for your parent territory in the sales territory import file. Then you can use this same number as the ParentUniqueTerritoryNumber of your child territories. Another reason to enter a UniqueTerritoryNumber is you can use the same UniqueTerritoryNumber in the child import files (sales territory resource, sales territory coverage, and sales line of business). Here are other things to keep in mind:

- Include the Proposal Number when creating a new territory that's part of a proposal. It's a good idea to set the unique territory number to a combination of the Territory Number and the Proposal Number. A territory proposal must be created in advance. The import process doesn't automatically create proposals when importing territories.
- When creating a new territory, the processing of the sales territory object import activity should complete prior to processing any of the sales territory child object (sales territory resource, sales territory coverage, sales territory line of business) import activities. The sales territory child object import activities can be processed in any order.
- The Import from Template feature can be used to group the uploading and processing sequence of individual sales territory, sales territory team, and sales territory coverage files.

### Create a New Empty Proposal

1. Navigate to **Sales > Territories**.
2. Click the Sales Territories Hierarchy tab.
3. Click **Manage Proposals**.
4. Click **Create**.
5. Name the proposal **Create Sales Manager and Salesperson Territory**.
6. Click **Save and View**.
7. Expand the Details section and note down the proposal number. In this example it's **CDRM\_40012**.

8. Click **Done** twice.

## Create Your Import Files

You need this information to start:

- Parent Territory NA Diagnostics has the unique number: 26088
- Salesperson Lisa Jones has the resource registry ID: 15
- Sales Manager Mateo Lopez has the resource registry ID: 16534
- The proposal number you noted, 40012 in this example.

You can save a copy of an exported Sales Territory and an exported Sales Territory Coverage file to use as templates for the import files.

1. Open an exported Sales Territory CSV file.
2. Replace the field values with these territory definitions:

| UniqueTerritory   | TerritoryNum | ProposalNum | CoverageModel         | Name                        | StatusCode | TypeCode | ParentUniqueTerritoryNum | OwnerResourceNumber | Description                                                   |
|-------------------|--------------|-------------|-----------------------|-----------------------------|------------|----------|--------------------------|---------------------|---------------------------------------------------------------|
| JC1234_CDRM_40012 | JC1234       | CDRM_40012  | SALES_ACCOUNT_CENTRIC | NA Diagnostics - San Mateo  | FINALIZED  | PRIME    | 26088                    | 16534               | Large Customers in San Mateo County - Diagnostic products     |
| JC5678_CDRM_40012 | JC5678       | CDRM_40012  | SALES_ACCOUNT_CENTRIC | NA Diagnostics - SC and RWC | FINALIZED  | PRIME    | JC1234                   | 15                  | Large Customers in Cities San Francisco - Diagnostic products |

3. Save the file to the new file name Active Parent and Child Territory Proposal Import.csv.
4. Open an exported Sales Territory coverage CSV file.
5. Replace the field values with these values for Mateo's territory coverage:

| UniqueTerritory   | TerrDimensio | CoverageType | ProductGroup  | ProductGroup  | CustomerSize  | AddressCount  | AddressCount  | AddressCity   |
|-------------------|--------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|
| JC1234_CDRM_40012 | Prod         | REGULAR      | 3000000959    | Diagnostics   | (Leave blank) | (Leave blank) | (Leave blank) | (Leave blank) |
| JC1234_CDRM_40012 | CSize        | REGULAR      | (Leave blank) | (Leave blank) | LS_LARGE      | (Leave blank) | (Leave blank) | (Leave blank) |

| UniqueTerrito         | TerrDimensio | CoverageTyp | ProductGroup  | ProductGroup  | CustomerSize  | AddressCoun | AddressCoun | AddressCity   |
|-----------------------|--------------|-------------|---------------|---------------|---------------|-------------|-------------|---------------|
| JC1234_<br>CDRM_40012 | Addr         | REGULAR     | (Leave blank) | (Leave blank) | (Leave blank) | US          | San Mateo   | (Leave blank) |

6. Add values for Lisa's territory coverage to the same file:

| UniqueTerrito         | TerrDimensio | CoverageTyp | ProductGroup  | ProductGroup  | CustomerSize  | AddressCoun   | AddressCoun   | AddressCity   |
|-----------------------|--------------|-------------|---------------|---------------|---------------|---------------|---------------|---------------|
| JC5678_<br>CDRM_40012 | Prod         | REGULAR     | 30000009594   | Diagnostics   | (Leave blank) | (Leave blank) | (Leave blank) | (Leave blank) |
| JC5678_<br>CDRM_40012 | CSize        | REGULAR     | (Leave blank) | (Leave blank) | LS_LARGE      | (Leave blank) | (Leave blank) | (Leave blank) |
| JC5678_<br>CDRM_40012 | Addr         | REGULAR     | (Leave blank) | (Leave blank) | (Leave blank) | US            | (Leave blank) | San Francisco |

7. Save the file to the new file name Active Parent and Child Territory Coverage Proposal Import.csv.

## Import Your Files for Active Territories

Import the sales territory file first to create the parent and child territories. Then import the sales territory coverage file to add the new coverage for both territories.

1. Navigate to Import Management.
2. Click **Create Import Activity**.
3. Enter these options.

| Field Name  | Value                                                 |
|-------------|-------------------------------------------------------|
| Name        | Import Parent and Child Territory in Proposal         |
| Object      | Sales Territory                                       |
| File Name   | Active Parent and Child Territory Proposal Import.csv |
| Import Mode | Update and create records                             |

4. Click **Next**.
5. In the Map Fields page, click **Next**.
6. Click **Submit**.
7. Verify that the import activity completed successfully.

Next, import the sales territory coverage file:

1. In the Manage Imports page, click **Create Import Activity**.
2. Enter these options.

| Field Name  | Value                                                          |
|-------------|----------------------------------------------------------------|
| Name        | Import Parent and Child Territory Coverage in Proposal         |
| Object      | Sales Territory Coverage                                       |
| File Name   | Active Parent and Child Territory Coverage Proposal Import.csv |
| Import Mode | Update and create records                                      |

3. Click **Next**.
4. Click **Next**.
5. Click **Submit**.
6. Verify that your import completed successfully.

## Review Your Imported Territories and Activate the Proposal

Check your imported territories before you activate your proposal.

1. Navigate to **Sales > Territories**.
2. Click **More Details**.
3. Click **Manage Proposals**.
4. Click **Create Sales Manager and Salesperson Territory**.
5. Search for the territory **NA Diagnostics - San Mateo**.
6. Select the territory and click **View in Hierarchy**.
7. The territory appears in the Territories table. Expand the hierarchy to see the child territory.
8. Click **Show Dimensions**. Review the coverage details for both territories.
9. Click **Activate**.
10. If you get a warning about the activation date, click **Yes**.
11. Use Refresh to monitor the progress of the activation process. On completion the proposal appears in the Completed Proposals list.

Your changes are available in your active territories.

### Related Topics

- [Import Territories Using a Template](#)

## FAQs for Territories

### Frequently Asked Questions (FAQs) for Territories

This section contains some frequently asked questions (FAQs) when setting up and maintaining territories. Scroll or search to find answers to common questions.

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

Sales managers define territories because they have the knowledge about their assigned territory and about their salespeople, and are best able to assign territories equitably. Sales managers delegate the territory definition activity to sales operations to save time.

Create an administrator who can modify all territories and quotas by giving her the Sales Administrator job role. Or select the Administrator check box for a territory team member in your territory. This person must also have a job role that includes the Territory Management Administration Duty. Now that person can view your territory and modify all territories lower in your territory hierarchy. He can also assign sales quotas for you.

#### What's a territory overlap?

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

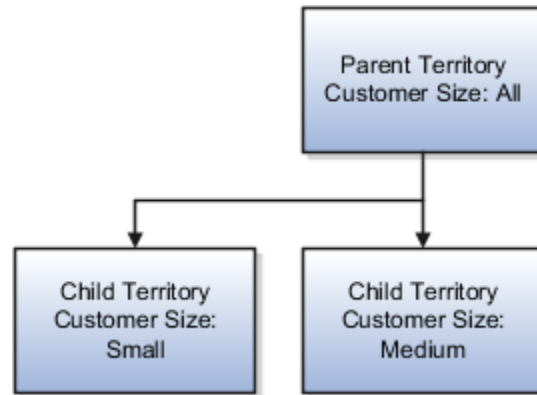
For example, a child territory with the dimension member Virginia and a child territory with the dimension member United States overlap.

An overlap is a problem if it's accidental. If it results in two salespeople mistakenly assigned the same area, the overlap causes conflicts and incorrectly assigned sales quotas. A deliberate overlap is useful for assigning additional salespeople or technical experts to the same areas also covered by the salespeople who have quotas. For example, the same area requires four salespeople with separate territories, but only one technical expert. It's a good practice to assign one of the territories the territory type of Overlay.

#### What's a territory gap?

A territory gap consists of a dimension member that belongs to a territory but doesn't belong to any children of that territory.

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



territory for large customers is missing and creates a gap.

## What happens if I select Forecast not visible to territory owner?

The owner of a parent territory sets the Forecast Invisible to Owner option to perform all forecasting actions and hide forecasts from the child territory owners.

The owner of the parent territory can submit the forecast for the child territory. If the child territory owner also owns the parent territory, then the territory owner can edit forecast items, add and remove forecast items as adjustments, and adjust the territory forecast.

## Why did my OBIEE report include old and deleted territories?

Only active territories can be assigned to sales objects such as accounts, opportunities, and leads. Territories in tables can be active, draft (in a proposal), or soft deleted.

For OBIEE reports, add these criteria to include only active territories:

- StatusCode = FINALIZED
- EffectiveEndDate is greater than today's date

## Why did postal codes not appear sorted when I edited coverage?

If your coverage values exceed 1000 for a territory, the values aren't sorted. Sorting more than 1000 values slows down your UI.

## What's a line of business?

A line of business is a category for particular kinds of commercial enterprise. Modify a territory by selecting one or more lines of business for that territory.

For example, during implementation a software company uses a broad categorization of products for lines of business and adds education, licenses, and consulting to their selection list for line of business.

## What's the difference between unique territory number and territory number?

The unique territory number and territory number are both user-friendly public identifiers for a territory. If updates are made to active territories only, using Import Management or the Less Details territory UI, then the unique territory number and territory number are the same.

If updates are made to territories in a proposal using Import Management or the territory More Details UI, then the unique territory number and territory number are different when there's a draft version of the territory (the territory is in a proposal). When the proposal is activated, the unique territory number is replaced by the territory number. (This assumes the Retain Territory Version option is enabled.)

## How can I enable territory dynamic tabs and nested dynamic tabs in Workspace?

Search for the profile option ZCA\_ENABLE\_WORKSPACE\_DYNAMIC\_TABS and enter a value of Y. Add the SVN\_OPEN\_OBJECTS\_IN\_DTNT\_PRIV privilege to the sales administrator or an equivalent administrator role.

### *Related Topics*

- [Work with Active Territories in Workspace](#)



# 10 Multiple Currencies

## Overview of Setting Up Multiple Currencies for Sales

The applications support multiple currencies, multiple daily rates, and currency rate conversion. If you're going to use multiple currencies, at a minimum you need to:

- Specify corporate currency
- Import or enter daily currency conversion rates
- Enable the currencies you're going to use, if you previously disabled them

Optionally, you can let salespeople select different currencies in leads and opportunities.

The applications also support different currency conversion rate types, allowing your business to maintain different conversion rates between currencies for the same period. Examples of conversion rate types are supplied: Spot, Corporate, User, and Fixed.

### Related Topics

- [Set Up Multiple Currencies for Sales](#)

## Set Up Multiple Currencies for Sales

You must complete several steps to enable salespeople to select multiple currencies in the applications.

**Note:** Perform these steps as a setup user (for example, a user with the Application Implementation Consultant job role).

Here are the high-level steps to enable multiple currencies:

| Step                                                      | Description                                                                                                                                                                                            | Where to Find More Information                                                    |
|-----------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| Set the default currency profile options.                 | Set the two profile options that specify default corporate currency and rate type.                                                                                                                     | See the Set Default Currency Profile Options section in this topic.               |
| Check the setting of the default currency profile option. | Check the setting of the default currency profile option. This currency is the default used for salespeople in the transactional pages. The default currency is also used in a salesperson's forecast. | See the Check Default Currency Profile Option Setting in this topic.              |
| Ensure currencies are enabled and verify precision.       | Ensure that all of the currencies you plan to use are enabled for use and verify the precision.                                                                                                        | See the Ensure Currencies are Enabled and Verify Precision section in this topic. |

| Step                                                                           | Description                                                                                                                                                                                                                                                                                      | Where to Find More Information                                                                                                                                                |
|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Set the multicurrency profile option for opportunities.                        | By default, one currency is set for an opportunity and its product lines. This default currency is a salesperson's preferred currency. If you want to enable multiple currencies for opportunities, set the multicurrency profile option.                                                        | See the Enable Multiple Currencies for Opportunity Product Lines topic in this chapter.                                                                                       |
| Let salespeople select the currency when editing leads and opportunities.      | In the opportunity and lead edit pages, the Currency list of values is read-only by default. If you have enabled multiple currencies, you can let users pick a different currency at the header level by making the Currency field editable.                                                     | See the How do I allow salespeople select a different currency in Opportunities and Leads? topic in this chapter.                                                             |
| Enter currency daily rates.                                                    | To load daily rates, you can use a spreadsheet or web services.                                                                                                                                                                                                                                  | See the Download the Desktop Integration Installer section in this topic.                                                                                                     |
| Define and maintain daily currency conversion rates and conversion rate types. | The conversion rate is the ratio between two currencies; it shows how much of one money exchanges for another. Conversion rates are also known as foreign exchange rates. You define and maintain different conversion rates between currencies for the same period using conversion rate types. | See the Overview of Defining Daily Currency Conversion Rates section in this topic. Also see the topic, Enter Daily Rates Using the Daily Rates Spreadsheet, in this chapter. |
| Set up cross rate rules and overrides.                                         | If you want to use combinations of cross rates across many currencies, you must: <ul style="list-style-type: none"><li>• Enable cross rates and allow cross-rate overrides</li><li>• Maintain cross-rate rules</li></ul>                                                                         | See the topic, Guidelines for Creating Conversion Rate Types, in this chapter.                                                                                                |

After you have enabled multiple currencies, salespeople can set their preferred currency for the transactional pages and for business intelligence. For more information, see the related topic on setting general user currency.

## Set Default Currency Profile Options

Your first step in the setup is to specify the default corporate currency and rate type by setting the Corporate Currency Default and Exchange Rate Type Default profile options.

Here's how you set the profile options:

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Company Profile
  - Task: Manage Currency Profile Options
2. On the Manage Currency Profile Options page, click **ZCA\_COMMON\_CORPORATE\_CURRENCY** and set it to your default corporate currency. The display name for this profile option is Corporate Currency Default. It stores configured corporate currency used across the applications.
3. Save your changes.

4. Click **ZCA\_COMMON\_RATE\_TYPE** and set it to the default currency rate type. The display name for this profile option is Exchange Rate Type Default. It stores the default currency exchange rate type.

## Check Default Currency Profile Option Setting

You also need to check the setting of the profile option that specifies default currency for users in the applications. The profile option, Default Currency (FND\_CURRENCY), not only specifies the default currency in the transactional pages, it's also used in a salesperson's forecast. By default, the profile option is set to US dollar. You can set this profile option at site level (affecting all users of the environment), at product level, or at user level.

**Note:** Users can set their own currency preference in the Personalization screens available in the user name menu in the global header. The setting users set for themselves override the settings that you make in the profile options screens at site or product level.

Here's how to check the default currency setting:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values

**Note:** If you can't find this profile option, search for it from the main Sales offering page, using the search available in the Tasks widget available on the right side of the page.

2. On the Manage Applications Core Administrator Profile Values page, search for and select the profile option name, Default Currency, or the code, FND\_CURRENCY.
3. Ensure the profile option value is set to your environment's default currency at site level.

To set the profile option for a specific user, create a new row in the table and enter the values as needed.

## Ensure Currencies are Enabled and Verify Precision

By default, all currencies are enabled. But it's a good idea to double-check that all of the currencies you plan to use are enabled and that their precision levels are set correctly. Precision is the number of digits placed after the decimal point. For example, set USD to precision 2 to display one dollar as \$1.00 in the UI.

Here's how to check:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Company Profile
  - o Task: Manage Currencies
2. On the Manage Currencies page, click **Search** to search for all currencies, without entering any search criteria.
3. Check that the **Enabled** option is set for each currency you plan to use.
4. Check that the **Precision** is set consistently for each currency you plan to use.

**Note:** When setting currency precision, be sure to set it correctly for all currencies you plan to use. This best practice ensures that decimal places are shown consistently in the UI for all the currencies you're using.

5. If you made any changes, save your work.

## Overview of Defining Daily Currency Conversion Rates

You have a few options for defining daily currency conversion rates, and you can maintain daily currency conversion rates between any two currencies. You can also enter daily conversion rates for specific combinations of foreign currency, date, and conversion rate type. The ways you can load currency rates are:

- Load them manually using the Create Daily Rates spreadsheet.
- Load them automatically using web services.

For more information, see the related topics and the topics later in this chapter.

### Related Topics

- [What's the difference between precision, extended precision, and minimum accountable unit for a currency?](#)
- [Enter Daily Rates Using the Daily Rates Spreadsheet](#)
- [Currency and Exchange Rate Settings for Analytics](#)
- [Load Daily Rates Automatically Using Web Services](#)
- [Set General User Currency](#)

## How do I allow salespeople select a different currency in Opportunities and Leads?

For salespeople to be able to select a different currency in opportunities and leads, you must make the field editable. By default, the currency selection field isn't editable for leads and opportunities.

Here's how to make the currency field editable:

1. Ensure you're working in an active sandbox.
2. Navigate to **Configuration > Application Composer**.
3. In the navigation tree, expand **Standard Objects**, expand **Opportunity** or **Sales Leads**, and click **Pages**.
4. In the region that corresponds to the page you're modifying, duplicate the standard layout and edit the resulting layout. For example, if you're making the field editable in opportunities, in the Creation Page Layout region, duplicate the standard layout and then edit the resulting layout.
5. Select the newly created layout, click **Actions** and then click **Edit UI Properties** from the drop-down list.
6. Select **Currency** from the Field Selection drop-down list.
7. Select the custom layout in the Layout Properties section.
8. Click **Update**.
9. Select the **Updatable** option.
10. Click **Submit**.
11. Click **Done** on the Edit UI Properties: Creation Layout window and save your changes.
12. While still in the active sandbox, navigate to **Sales > Opportunities** or **Sales > Leads** as a user who's a sales resource, such as a sales administrator or sales representative. Verify the change by editing an opportunity or lead and validating that the **Currency** field is a drop-down list that users can select.
13. Publish the sandbox according to your company's business practices.

You can find more information on configuring lead and opportunity pages in the related topics.

# Enable Multiple Currencies for Opportunity Product Lines

You may want to let salespeople set different currencies on opportunity product lines. The setup involves the profile option, Multiple Currencies for Opportunity Revenue Lines Enabled.

**Note:** With this setup, when a user changes the opportunity currency, the change is propagated to the opportunity product lines.

Here's how you set the profile option to enable multiple currencies on product lines:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Opportunity Profile Options
2. On the Manage Opportunity Profile Options page, search for the profile option, Multiple Currencies for Opportunity Revenue Lines Enabled (the code is MOO\_REVN\_ENABLE\_MULTICURRENCY) and select it.
3. Set to **Yes** to allow different currencies at the line and header levels in opportunities. Set to **No** to disallow the functionality.
4. Save your changes.

## Implementation Concepts for Currencies

### Considerations for Defining Currencies

Consider these points about entering the currency code, date range, or symbol for the currency, when you create or edit currencies.

#### Currency Codes

You can't change a currency code after you enable the currency, even if you later disable that currency.

#### Date Ranges

You can enter transactions denominated in the currency only for the dates within the specified range. If you don't enter a start date, then the currency is valid immediately. If you don't enter an end date, then the currency is valid indefinitely.

#### Symbols

Some applications support displaying currency symbols. You may enter the symbol associated with a currency so that it appears along with the amount.

### Related Topics

- [What's the difference between precision, extended precision, and minimum accountable unit for a currency?](#)
- [What's a statistical unit currency type?](#)
- [Euro Currency Derivation](#)

## Currency Precision Level for Quota Amounts

Currency amounts for quotas use the number of decimal places set in the Precision Level field for the corporate currency. If you don't set the precision level, then amounts are saved and displayed with two decimal places.

You set the precision level for the currency in the Manage Currencies page. The currency you select for the profile option `ZCA_COMMON_CORPORATE_CURRENCY`, Corporate Currency Default, is the corporate currency.

## Guidelines for Running the Revalue Opportunity Currency Process

The Revalue Opportunity Currency process manages the effects of revaluation of currency exchange rates on opportunity revenue.

Opportunity revenue is stored in the user-entered currency (also called transaction currency) in the revenue model. The revenue model also stores two exchange rates:

- The exchange rate between the entered revenue currency and the configured corporate currency, as specified in the global configuration during the implementation. This rate facilitates construction of materialized views that roll up revenue metrics along the territory hierarchy.
- The exchange rate between entered revenue currency and the entered opportunity-level currency. This rate calculates the opportunity summary revenue amounts as the sum of line revenue amounts. Opportunity line revenue amounts can be entered in currencies that are different from the currency specified at the opportunity level.

The process works in combination with these two profile options that store corporate currency and rate type:

- Corporate Currency Default: Stores configured corporate currency.
- Exchange Rate Type Default: Stores configured rate type.

Also keep in mind the following impact of the process:

- The process can also be triggered when corporate currency, configured rate type, or exchange rate (or any combination of these) is modified, either directly through administrator intervention or when these currency parameters change in the general ledger.
- Only product lines in Open status are targeted by the batch process.
- When updating product lines, the process doesn't consider whether the revenue is already included in a forecast.
- Forecasting activity is paused when this process executes.

## Run the Process

Run the Revalue Opportunity Currency process from the job process screen available from the **Scheduled Processes** option on the Navigator menu. Select the job name Revalue Opportunity Currency.

Here are the steps to run the process in basic mode:

1. Sign in as a sales administrator or as a setup user.
2. From the Navigator, select **Scheduled Processes** (within the Tools category).  
The Scheduled Processes overview page appears.
3. Click **Schedule New Process**.
4. In the search dialog box, search for and select the **Revalue Opportunity Currency** process.  
The Process Details page appears.
5. Click **Submit**.

This table shows the logical parameters expected by the batch process:

| Parameter                                   | Default                                                                                  | Description                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------|------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| CRM Common Currency                         | Stored in the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_CURRENCY) | <ul style="list-style-type: none"><li>Configured corporate currency.</li><li>Passed if corporate currency changes.</li><li>Program doesn't check against profile for a match.</li></ul>                                                                                                                                                         |
| CRM Common Currency Rate Type               | Stored in the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE)          | <ul style="list-style-type: none"><li>Configured rate type.</li><li>Passed if there is a requirement to reevaluate the conversion rate against a different rate type.</li><li>If no value is passed, the program uses the profile option value.</li></ul>                                                                                       |
| Business Unit Organization ID               | No default                                                                               | Leave blank, and all business units are targeted. Otherwise, provide the specific business unit ID.                                                                                                                                                                                                                                             |
| Number of Opportunities per Database Update | 500                                                                                      | Oracle recommends that you leave this parameter at the default value or blank (and program uses default value).                                                                                                                                                                                                                                 |
| Last Batch Job Run Time Stamp               | See Description column                                                                   | This parameter can be used for batch program reruns. When a few opportunities have failed, the log reflects all the failed opportunities, as well as provides a time stamp for "Start Batch Job Time Stamp". Enter this time stamp on the second run of the batch program to limit the scope of the batch job to only the failed opportunities. |
| Effective Date                              | System date                                                                              | Date passed to general ledger (using an API) to calculate the conversion rate. The program doesn't validate that the date must be in the future, so, in effect, any date can be passed.                                                                                                                                                         |

| Parameter | Default | Description |
|-----------|---------|-------------|
|           |         |             |

## Impact of Process on Revenue Attributes

The Revalue Opportunity Currency process impacts several revenue attributes, as shown in this table.

| Revenue Model Attribute                                                                                                            | Attribute Description/Function                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Batch Process Update                                                                                                                                                                                                                                                                                                                    |
|------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>CRM_CURRENCY_CODE</li> <li>CRM_CONVERSION_RATE_TYPE</li> <li>CRM_CONVERSION_RATE</li> </ul> | <p>These attributes store the exchange rate between revenue line currency and the corporate currency, and are used to construct the materialized views for Closed, Pipeline and Unforecasted revenue metrics along the territory hierarchy. For lines in status category of Open, these attributes are updated whenever a revenue line is created or updated or whenever an opportunity with revenue is updated or saved.</p> <ul style="list-style-type: none"> <li>The default for CRM_CURRENCY_CODE is taken from the profile option, Corporate Currency Default (ZCA_COMMON_CORPORATE_CURRENCY).</li> <li>The default for CRM_CONVERSION_RATE_TYPE is taken from the profile option, Exchange Rate Type Default (ZCA_COMMON_RATE_TYPE).</li> <li>CRM_CONVERSION_RATE is calculated using a GL API.</li> </ul> | <p>CRM_CURRENCY_CODE and CRM_CONVERSION_RATE_TYPE are updated based on a parameter to the batch program. If these two parameters are passed in, the program uses them to update the revenue tables. If these values aren't passed in, the application retrieves the profile option values and updates the revenue tables with them.</p> |
| REVN_AMT_CURCY_CODE                                                                                                                | Currency of the revenue (summary or line)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Entered currency. Not updated.                                                                                                                                                                                                                                                                                                          |
| <ul style="list-style-type: none"> <li>CONVERSION_RATE_TYPE</li> <li>CONVERSION_RATE</li> </ul>                                    | <p>These attributes store the exchange rate between revenue line currency and the summary revenue (opportunity level) currency and are used to convert the revenue line amounts to opportunity level currency. For lines in a status category of Open, these attributes are updated whenever the revenue is created or updated or whenever an opportunity with revenues is updated or saved.</p>                                                                                                                                                                                                                                                                                                                                                                                                                  | <ul style="list-style-type: none"> <li>CONVERSION_RATE_TYPE is updated based on a parameter to the batch program.</li> <li>CONVERSION_RATE is updated. Changes if corporate rate types change. Rate is obtained using (conversion_rate_type, line_currency_code, summary_currency_code, and system date).</li> </ul>                    |
| <ul style="list-style-type: none"> <li>REVN_AMT</li> <li>DOWNSIDE_AMT</li> <li>UPSIDE_AMT</li> </ul>                               | <p>For summary revenue amounts, these amounts are calculated as the sum of line revenue amounts. These amounts are converted to the opportunity-level currency before calculating the sum. The exchange rate stored in the CONVERSION_RATE attribute is used to perform the conversion.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <ul style="list-style-type: none"> <li>Line revenue isn't updated.</li> <li>Summary revenue is recalculated.</li> </ul>                                                                                                                                                                                                                 |
| LAST_UPDATE_DATE                                                                                                                   | WHO column                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Updated.                                                                                                                                                                                                                                                                                                                                |
| USER_LAST_UPDATE_DATE                                                                                                              | Functional WHO column                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Not updated.                                                                                                                                                                                                                                                                                                                            |



### Related Topics

- [Considerations for Setting Up Opportunity Revenue](#)

## Enter Daily Rates Using the Daily Rates Spreadsheet

You are required to enter the daily rates for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for 5 days.

To load rates using the Create Daily Rates Spreadsheet, you must first install Oracle ADF Desktop Integration client software. Oracle ADF Desktop Integration is an Excel add-in that enables desktop integration with Microsoft Excel workbooks. You can download the installation files from the Tools work area by selecting Download Desktop Integration Installer.

### Entering Daily Rates

1. From the General Accounting work area, select the **Period Close** link.
2. From the Tasks panel, click the **Manage Currency Rates** link.

Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.

3. Click the Daily Rates tab.

Use the Daily Rates tab to review and enter currency rates.

4. Click the **Create in Spreadsheet** button.

Use the Create Daily Rates spreadsheet to enter daily rates in a template that you can save and reuse.

5. Click in the **From Currency** field. Select the GBP - Pound Sterling list item.
6. Click in the **To Currency** field. Select the USD - US Dollar list item.
7. Click in the **Conversion Rate** field. Select the Spot list item.
8. Click in the **From Conversion** field. Enter a valid value: 10/2/2017.
9. Click in the **To Conversion Date** field. Enter a valid value: 10/6/2017.
10. Click in the **Conversion Rate** field. Enter a valid value: 1.6.
11. Click **Submit** and click **OK** twice.
12. Review the **Record Status** column to verify that all rows were inserted successfully.
13. Save the template to use to enter daily rates frequently. You can save the spreadsheet to a local drive or a shared network drive.
14. Optionally, edit the rates from the Daily Rates user interface or resubmit the spreadsheet.

### Related Topics

- [Examples of Using Conversion Rate Types in a Journal](#)
- [Guidelines for Using Desktop Integrated Excel Workbooks](#)
- [Update Currency Rates](#)

## Update Currency Rates

You're required to change today's daily rates that were already entered. The rates you're changing are for currency conversion from Great Britain pounds sterling (GBP) to United States dollars (USD) for your company InFusion America.

Currency conversion rates were entered by an automatic load to the Daily Rates table. They can also be entered through a spreadsheet.

### Updating Currency Rates

1. Navigate to the Period Close work area.  
Use the Period Close work area to link to close processes and currency process.
2. Click the Manage Currency Rates link.  
Use the Currency Rates Manager page to create, edit, and review currency rate types, daily rates, and historical rates.
3. Click the Daily Rates tab.  
Use the Daily Rates tab to review and enter currency rates.
4. Click the From Currency list. Select the GBP - Pound Sterling list item.
5. Click the To Currency list. Select the USD - US Dollar list item.
6. Enter the dates for the daily rates that you are changing. Enter today's date.
7. Click the Rate Type list. Select the Spot list item.
8. Click the Search button.
9. Click in the Rate field. Enter the new rate of 1.7 in the Rate field.
10. Click in the Inverse Rate field. Enter the new inverse rate of 0.58822 in the Inverse Rate field.
11. Click the Save button.

#### Related Topics

- [Guidelines for Using Desktop Integrated Excel Workbooks](#)

## Guidelines for Creating Conversion Rate Types

Maintain different conversion rates between currencies for the same period using conversion rate types.

The following conversion rate types are predefined:

- Spot
- Corporate
- User
- Fixed

You can use different rate types for different business needs. During journal entry, the conversion rate is provided automatically based on the selected conversion rate type and currency, unless the rate type is **User**. For **User** rate types, you must enter a conversion rate. You can define additional rate types as needed. Set your most frequently used rate type as the default. Conversion rate types can't be deleted.

Assign conversion rate types to automatically populate the associated rate for your period average and period end rates for the ledger. For example, you can assign the conversion rate type of **Spot** to populate period average rates, and the conversion rate type of **Corporate** to populate period end rates. Period average and period end rates are used in translation of account balances.

Conversion rate types are used to automatically assign a rate when you perform the following accounting functions:

- Convert foreign currency journal amounts to ledger currency equivalents.
- Convert journal amounts from source ledgers to reporting currencies or secondary ledgers.
- Run revaluation or translation processes.

When creating conversion rates, decide whether to:

- Enforce inverse relationships
- Select pivot currencies
- Select contra currencies
- Enable cross rates and allow cross-rate overrides
- Maintain cross-rate rules

## Enforce Inverse Relationships

The **Enforce Inverse Relationship** option indicates whether to enforce the automatic calculation of inverse conversion rates when defining daily rates. The following table describes the impact of selecting or not selecting the option.

| Action       | Results                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Selected     | <p>When you enter a daily rate to convert currency A to currency B, the inverse rate of currency B to currency A is automatically calculated and entered in the adjacent column. If either rate is changed, the application automatically recalculates the other rate.</p> <p>You can update the application calculated inverse rate, but once you do, the related rate is updated. The option enforces the inverse relationship is maintained but doesn't prevent you from updating the rates.</p> |
| Not Selected | <p>The inverse rate is calculated, but you can change the rate and update the daily rates table without the corresponding rate being updated.</p>                                                                                                                                                                                                                                                                                                                                                   |

## Select Pivot Currencies

Select a pivot currency that's commonly used in your currency conversions. A pivot currency is the central currency that interacts with contra currencies. For example, you set up a daily rate between the US dollar (USD) and the Euro currency (EUR) and another between the USD and the Canadian dollar (CAD). USD is the pivot currency in creating a rate between EUR and CAD. EUR and CAD are the contra currencies. Select the pivot currency from the list of values which contains those currencies that are enabled, effective, and not a statistical (STAT) currency. The description of the pivot currency is populated automatically based on the currency definition.

If you want the application to create cross rates against a base currency, define the base currency as the pivot currency. Selected pivot currencies can be changed in the Rate Types page.

## Select Contra Currencies

Select currencies available on the list of values as contra currencies. The available currencies are those currencies which are enabled, effective, not STAT currency, and not the pivot currency selected earlier. The description of the contra currency is populated automatically based on the currency definition. Add or delete contra currencies in the Contra Currencies region of the Rate Types page.

## Enable Cross Rates and Allow Cross Rate Overrides

Check the **Enable Cross Rates** check box to calculate conversion rates based on defined currency rate relationships. General Ledger calculates cross rates based on your defined cross rate rules. Associate your cross rate rules with a conversion rate type, pivot currency, and contra currencies. Cross rates facilitate the creation of daily rates by automatically creating the rates between contra currencies based on their relationship to a pivot currency. If the **Enable Cross Rates** option is deselected after entering contra currencies, the application stops calculating cross rates going forward for that particular rate type. All the earlier calculated cross rates for that rate type remain in the database unless you manually delete them.

For example, if you have daily rates defined for the pivot currency, USD to the contra currency, EUR, and USD to another contra currency, CAD, the application automatically creates the rates between EUR to CAD and CAD to EUR. You don't have to manually define the EUR to CAD and CAD to EUR rates.

Select the **Allow Cross Rates Override** check box to permit your users to override application generated cross rates. If you accept the default of not selected, the application generated cross rates can't be overridden.

## Maintain Cross Rate Rules

Define or update your cross rate rules at any time by adding or removing contra currency assignments. Add a contra currency to a cross rate rule and run the Daily Rates Import and Calculation process to generate the new rates. If you remove a cross rate rule or a contra currency from a rule, any cross rates generated previously for that contra currency remain unless you manually delete them. Changes to the rule aren't retroactive and don't affect previously stored cross rates. The Cross Rate process generates as many rates as possible and skips currencies where one component of the set is missing.

**Note:** With a defined web service that extracts daily currency conversion rates from external services, for example Reuters, currency conversion rates are automatically updated for the daily rates and all cross currency relationships.

### Related Topics

- [Examples of Using Conversion Rate Types in a Journal](#)
- [What's the difference between calendar and fiscal period naming?](#)

# 11 Adaptive Search and Workspace

## Overview of Adaptive Search

Oracle is completing the process of replacing the CRM search technology with Adaptive Search, a high-performance search engine that provides keyword searching and enhanced filtering capabilities. Digital Sales UIs and features rely exclusively on Adaptive Search. In CX Sales, some work areas still rely on legacy CRM Search technology.

By default, all customers now have Adaptive Search enabled automatically for Accounts and Contacts. You can enable other objects using Setup Assistant or manually. Not all the available objects are sales objects. For example, Partner and Partner Contact are only pertinent for Partner Relationship Management. HR Help Desk Request, Installed Base Asset, Internal Service Request, and Service Request are specific to Fusion Service. Adaptive Search is also available on custom objects or child objects you create.

Here's where you can use Adaptive Search:

- All Digital Sales UIs
- Workspace in CX Sales

A work area where salespeople can work on all of the available business objects at the same time.

- Work areas for individual business objects in CX Sales.
- Global Search in CX Sales

This is the keyword search available at the top of the page in CX Sales.

- REST APIs

**Note:** Many customers run their applications and Oracle Databases in their own data centers on Oracle Cloud@Customer. Currently, Cloud@Customer pods or government pods don't support Adaptive search.

## Workspace and Work Areas Powered by Adaptive Search

Oracle now provides work areas for the different business objects that use the same underlying Adaptive Search technology as Workspace.

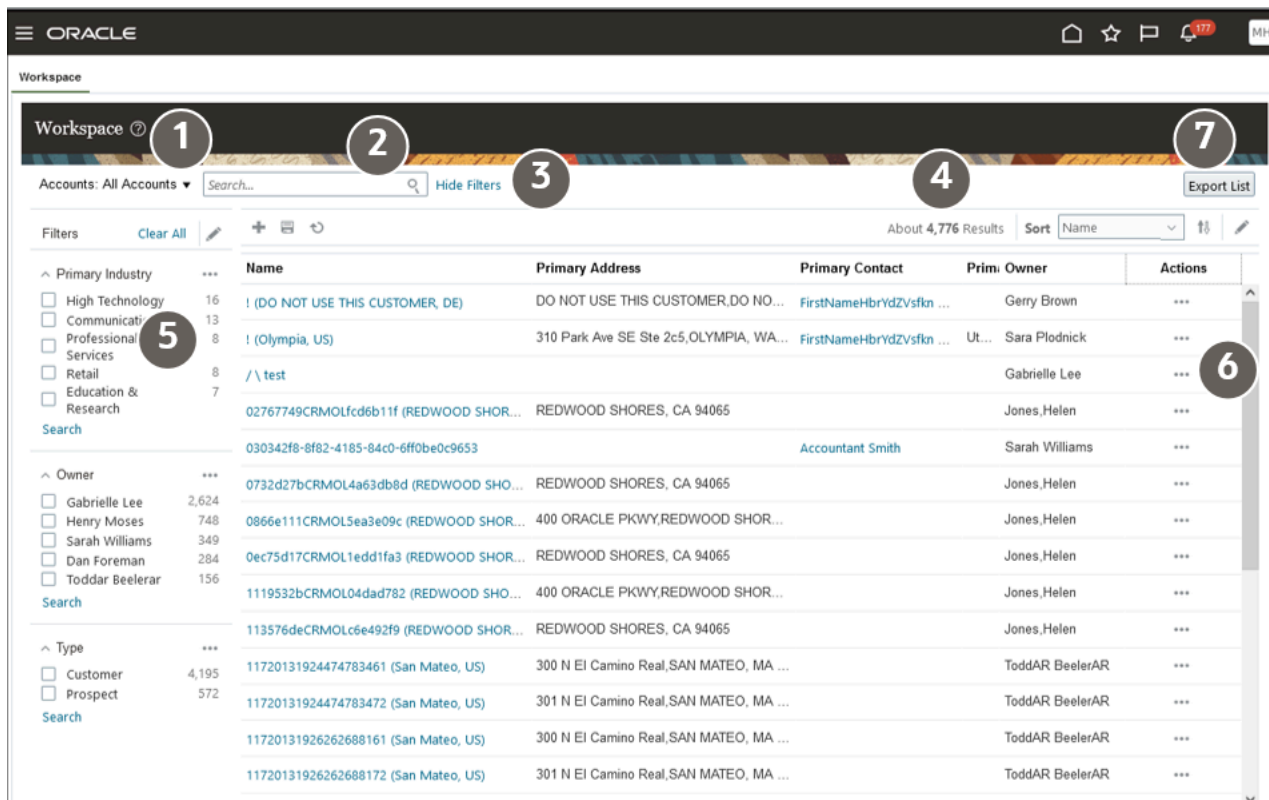
Salespeople navigating to the Accounts, Contacts, Leads, Opportunities, and other work areas get the same improvement in search performance and pretty much the same features as Workspace. You can think of the individual work areas as mini-Workspaces.

## Workspace

Workspace improves and speeds up searches and makes key sales information available all within a single, unified work area. No more navigation to the Opportunities work area to see your key opportunities and then to the Leads work area to work on your leads.

The Workspace UI icon appears on the home page in a separate Workspace tab. When you configure navigation, you can move the icon to the Sales tab so salespeople see all the navigation icons together in one tab.

Here's a screenshot of the Workspace UI highlighting some of its key features.

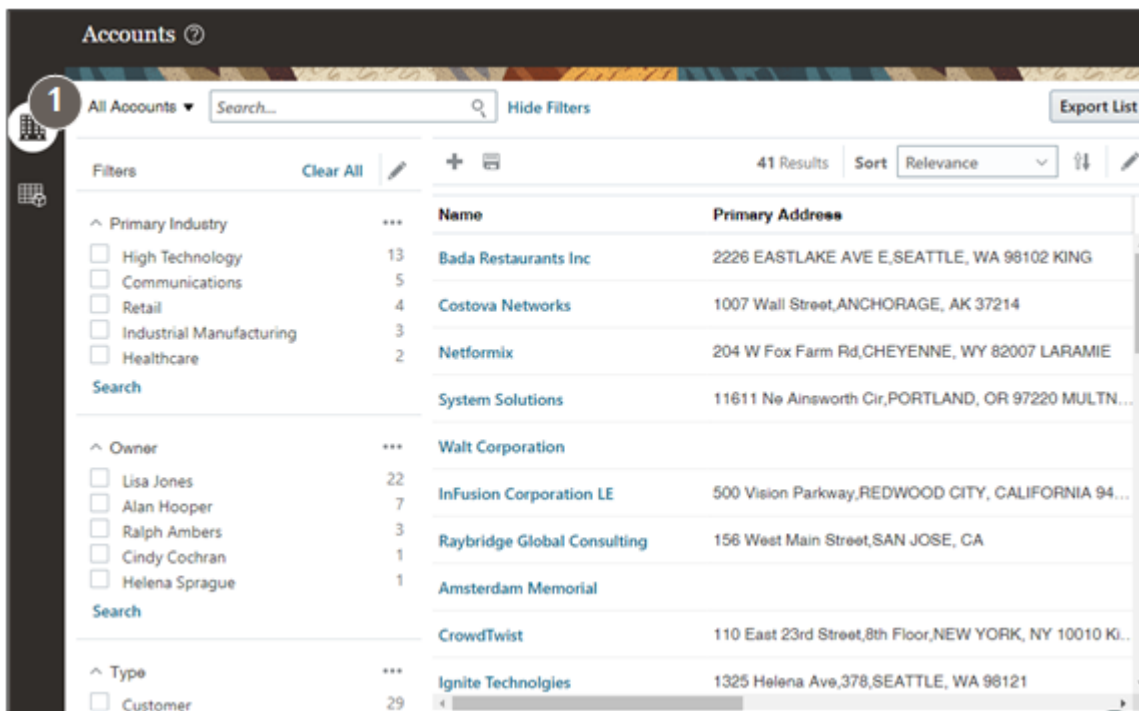


| Callout Number | Feature Description                                                                                                                                                                                                                                                                         |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1              | Select the object and saved search you want to display in Workspace.                                                                                                                                                                                                                        |
| 2              | Use the Search field to search within the constraints of the saved search you selected. If you selected My Accounts, you get to view and search only the accounts where you're on the territory or in the sales team. Selecting All Accounts, makes it possible for you to search them all. |
| 3              | Control the display of filters by clicking Display Filters and Hide Filters.                                                                                                                                                                                                                |
| 4              | View the number of records in your search results.                                                                                                                                                                                                                                          |
| 5              | Use filters to understand your search results and to narrow down your search further. Filters show you the items with the highest number of results, for example, the industries with most accounts or salespeople who own the most opportunities.                                          |

| Callout Number | Feature Description                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 6              | Log calls, take notes, create tasks, and take other actions on search results without having to drill down into them. For accounts, you can even create an opportunity.                                                                                                                                                                                                                                                         |
| 7              | From time to time, you may want to export data from Workspace for offline viewing and verification. For example, a sales manager might want to export a list of accounts to perform a more in-depth analysis of their sales team or for reporting purposes. Only sales manager and sales administrator roles are granted the predefined security privilege ZCA_WORKSPACE_EXPORT to access the export data feature in Workspace. |

## Work Areas Powered by Adaptive Search

Work areas for individual business objects, provide much the same functionality as Workspace.



There are a few key differences.

- Workspace lets you work on all business objects in one place and switch between them. Work areas for the different objects don't. For example, in Workspace, you can switch between working on accounts and opportunities. In the Accounts work area, you can only work on accounts. To work on opportunities, you must open the Opportunities work area.
- Work areas can include tabs with BI reports and additional functionality. For example, the Territories work area includes additional features that Workspace doesn't. It enables the creation of sales territory hierarchies.
- The work areas for the individual business objects don't support dynamic tabs, a feature targeted at service users.

These work areas support the Adaptive Search and other Workspace features:

- Accounts
- Activities
- Assets
- Campaigns
- Contacts
- Deal Registrations
- Leads
- Opportunities
- Partners
- Quotes and Orders
- Territories

The few sales work areas still use the legacy CRM Search include the following:

- Products
- Competitors
- Business Plans
- Price Books
- Service Requests

## How Salespeople Search in the UI and What You Can Configure

Here's how salespeople use both the Workspace UI and the work areas powered by Adaptive Search and how you can modify the default behavior provided by Oracle.

| How Salespeople Search in the UI                                                                                                                                                                                                                                                                                                                                                                                                                              | What Administrators Can Configure                                                                                                                                                                                                                                                            |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Selecting a saved search displays a list that matches the saved search criteria and determines the scope of any search you perform on the page. For example, if you select All Accounts, you're searching all accounts you can view. If you select My Accounts, then you're searching only the accounts that you own.                                                                                                                                         | You can create your own saved searches targeted to specific roles within the sales organization. And you can determine which saved search appears by default when salespeople open the UI. Salespeople can create their own personal saved searches and override the administrator defaults. |
| <p>You can enter one or more search terms in the <b>Search</b> field.</p> <p>You can use related information for your searches. For an account, you can search by company name, the city where the account is located, or the primary contact at the company, for example. You can even search for an account by the name of the salesperson on the sales team.</p> <p>The search results match whole terms, but you can use the (*) wildcard for partial</p> | You can enable or disable the attributes available for search. Oracle enables the most common attributes for you, but you must enable the search for any child objects and fields you create in Application Composer.                                                                        |



| How Salespeople Search in the UI                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | What Administrators Can Configure                                                                                                                                                                                                                                  |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| words and use operators, including NOT, OR, and Between for date ranges.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                    |
| You can view the filters used in the saved search by clicking the <b>Show Filters</b> link. You can also add filters of your own.                                                                                                                                                                                                                                                                                                                                                                                                                                                          | You can specify which additional fields users can add as filters and you can set up groupings of values the filters show. For example, you can break down opportunities by revenue ranges: 0 to 10,000, 10,000 to 100,000, 100,000 to 500,000, and 500,000 and up. |
| Filters show the most common values and the number of records in each. For example, a search of accounts with the primary industry as a filter, automatically displays the most frequent industries and the number of records for each. A search of opportunities using win probability as a filter, displays different ranges of win probabilities and the number of records in each range.<br><br>Your filter selections are additive, if you select Health Care as the primary industry and then Lisa Jones as the owner, Workspace displays only those Health Care accounts Lisa owns. | You can configure value ranges for numeric, corporate currency, percent, and date filters. For example, you can configure value ranges for the opportunity win probability filter and other similar filters.                                                       |
| Salespeople can save any search criteria they enter as their own personal saved search.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | You can create saved searches for use by the whole sales organization and you can tailor them to different roles.<br><br>You can expose the saved searches as filters in Workspace infolets to display key sales information right on the home page.               |
| Sales administrators and sales managers can download search results into an Excel spreadsheet.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | You can remove the Export List button from the page using Application Composer. You can also enable other custom sales roles to use the button, by granting the privilege ZCA_WORKSPACE_EXPORT.                                                                    |

## Who Gets Workspace and New Work Areas Automatically

Oracle automatically enables Adaptive Search and Workspace for accounts and contacts for all customers. Oracle runs the Publish process behind the scenes, and the Workspace icon is available on the home page for salespeople to manage accounts and contacts without any additional setup.

New customers get the new work areas powered by Adaptive Search by default. Existing customers must still opt in to the **Open Work Areas Powered by Adaptive Search** feature to get the new work areas.

When you enable an object for Adaptive Search, salespeople clicking on its icon get the new work area. Clicking on an icon for an object that hasn't been enabled, opens the legacy work area.

# Adaptive Search Setup

## What are the Adaptive Search setup UI components?

Here's a quick rundown of the Configure Adaptive Search page. The rest of this chapter provides the details.

The Configure Adaptive Search page is made up of five tabs:

- Monitor
- Setup
- Parameters
- Configure UI
- Configure Global Search

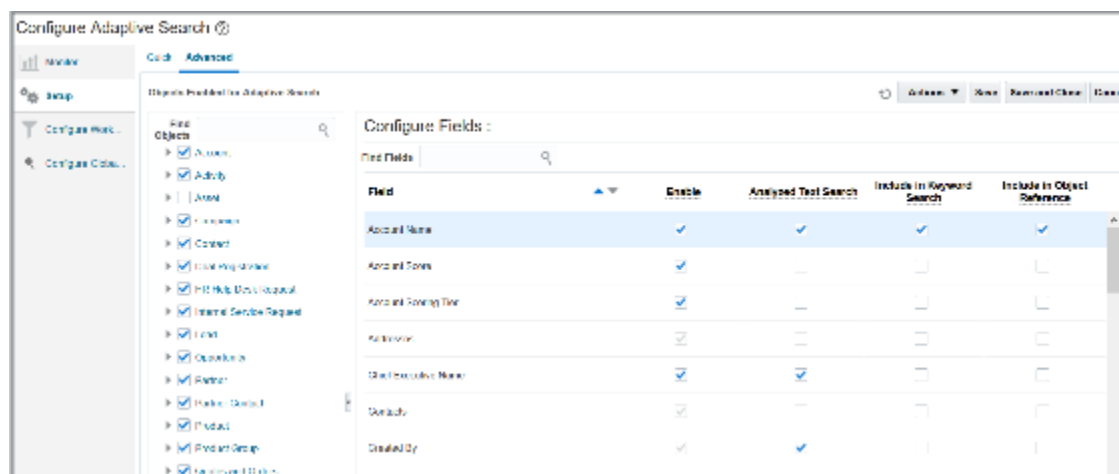
## Setup

The setup tab includes the **Quick** and **Advanced** subtabs. Use the **Quick** subtab to get an overview of the predefined and custom objects are available for Adaptive Search. If you're OK with using the search configuration provided by Oracle, you can select the objects you want to enable and click **Publish**.

On the **Advanced** subtab, you can change which objects and fields are enabled for search, how they're searched on, and other search configurations. You can also enable and disable objects for searching. Click Publish to save these changes. Once the publish job is complete, any user with permission to access an enabled object can search on fields enabled within the object, retrieve search results, create saved searches, and more.

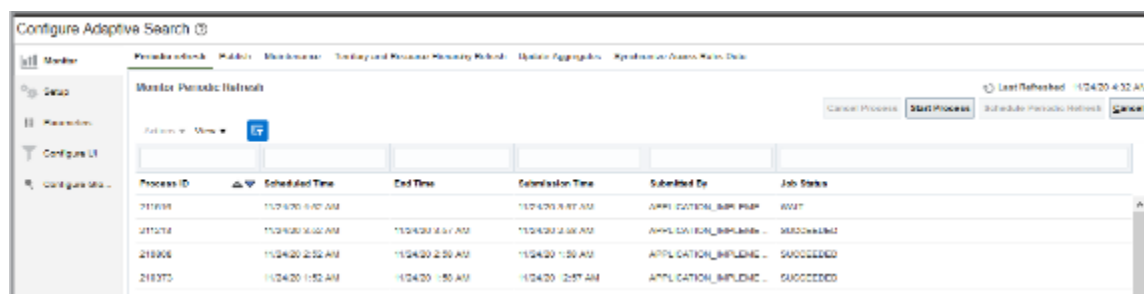
The left side of the **Advanced** subtab shows the ready-to-use objects, including any custom objects or child objects you created in Application Composer. The right portion lists the fields, including any custom fields you created. You can also view field names and their types and can enable up to 15 fields for use in searches of related objects in the **Include in Object Reference** column. You must publish your changes before they take effect. See the Search Setup section of this chapter for details.

**Note:** To enable search on custom fields and custom child objects, you must first publish them from the sandbox. You can't use the Configure Adaptive Search UI within a sandbox.



## Monitor

You can monitor the publish process as well as other indexing and maintenance processes on the **Monitor** tab. From here, you can view the real-time progress of Adaptive Search indexing jobs. When you click **Publish**, a progress bar indicates how much of the indexing job has been processed and what percentage remains to complete the indexing process. See the [Monitor Adaptive Search Background Processes](#) topic for more details.



## Parameters

You can configure various parameters to specify how Adaptive Search behaves, using the **Parameters** tab available in the Adaptive Search setup page. For example, you can enable mass update and actions, set record-level navigation, specify the fuzziness level for search, and so on. See the [How do I edit Adaptive Search parameters?](#) topic for details.

**Configure Adaptive Search** ?

Monitor  
Setup  
Parameters  
Configure UI  
Configure Globa...

**Parameters**

Edit Adaptive Search Parameters Edit Cancel

| Parameter Name                                              | Minimum Value | Maximum Value | Default Value | Current Value |
|-------------------------------------------------------------|---------------|---------------|---------------|---------------|
| Decouple incremental job at the end of Publish              | -             | -             | N             | N             |
| Enable Group By in Workspace                                | -             | -             | N             | Y             |
| Enable Keyword Highlighting in Workspace                    | -             | -             | Y             | Y             |
| Enable Mass Actions                                         | -             | -             | Y             | Y             |
| Enable Mass Update                                          | -             | -             | N             | Y             |
| Enable record level navigation                              | -             | -             | Y             | Y             |
| Fuzziness Level                                             | None          | Two           | One           | One           |
| Lookup Type Cache Concurrency Level                         | 1             | 10            | 2             | 2             |
| Lookup Type Cache Initial Capacity                          | 16            | 10000         | 16            | 16            |
| Lookup Type Cache Load Factor                               | 0.5           | 1.0           | 0.75          | 0.75          |
| Maximum Number of Records for Export                        | 1             | 10000         | 2000          | 2000          |
| Maximum number of records that can be selected in Workspace | 1             | 25            | 10            | 10            |
| Enable Partial Publish                                      | -             | -             | Y             | Y             |
| Search Filter Limit                                         | 1             | 10            | 6             | 6             |
| Shard maximum size required for index in GB                 | 1             | 9999          | 45            | 45            |

## Configure UI

You can use the **Configure UI** tab to specify which fields are available for selection as filters and for display as columns in search results. You can also set up filter value groupings or value ranges for date and numeric fields. Users can select these value groupings to filter search results. See *Enable Fields for Display as Filters and Search Result Columns* for details.

**Note:** When editing UI columns and specifying fields, always ensure that you have at least four fields selected for both standard and custom objects.

From here, you can also add or remove Create, Export, and Mass Update buttons for every object using the following check boxes:

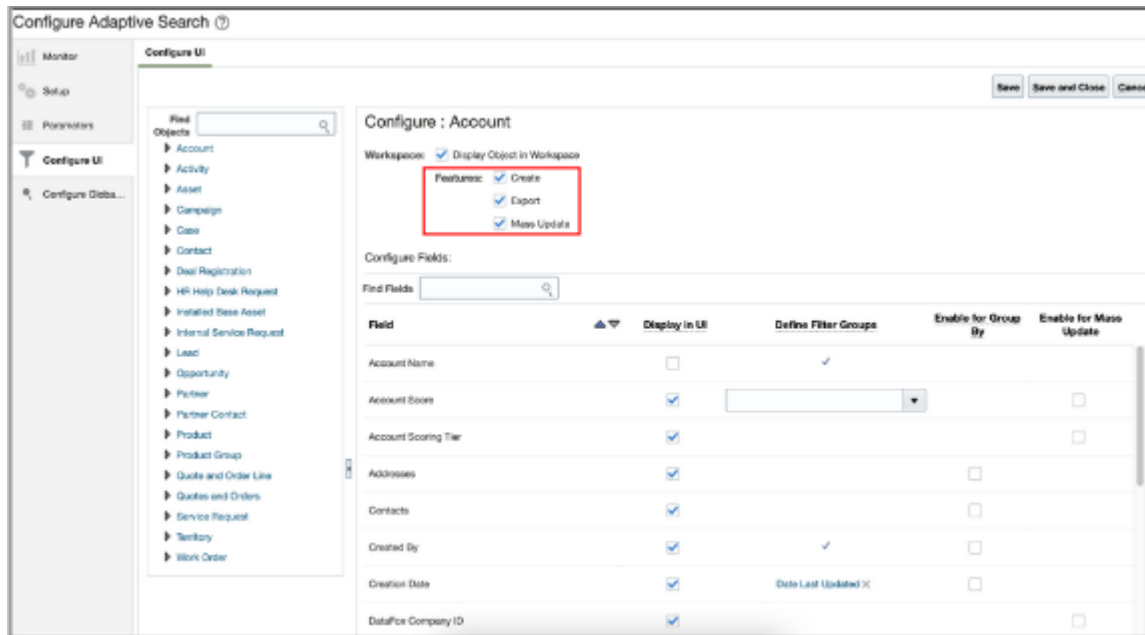
- **Create**
- **Export**
- **Mass Update**

For example, follow these steps if you want to restrict the export option in Workspace based on the Account object.

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area, and click the **Configure Adaptive Search** task:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Configure Adaptive Search

The Configure Adaptive Search page appears.

3. Click **Configure UI**.
4. Select Account in the left pane of the tab as the object you want to restrict the export option in Workspace.
5. Uncheck the **Export** option in the Features section as highlighted in this sample screenshot.



6. Click **Save and Close**.

You can verify your changes as follows:

1. Log out and Log in again as a sales representative user.
2. Navigate to **Workspace > My Accounts Saved Search**
3. Verify that the **Export List** button isn't displaying in the Account Workspace List Page.

See [How do I access Workspace data offline?](#) for more information.

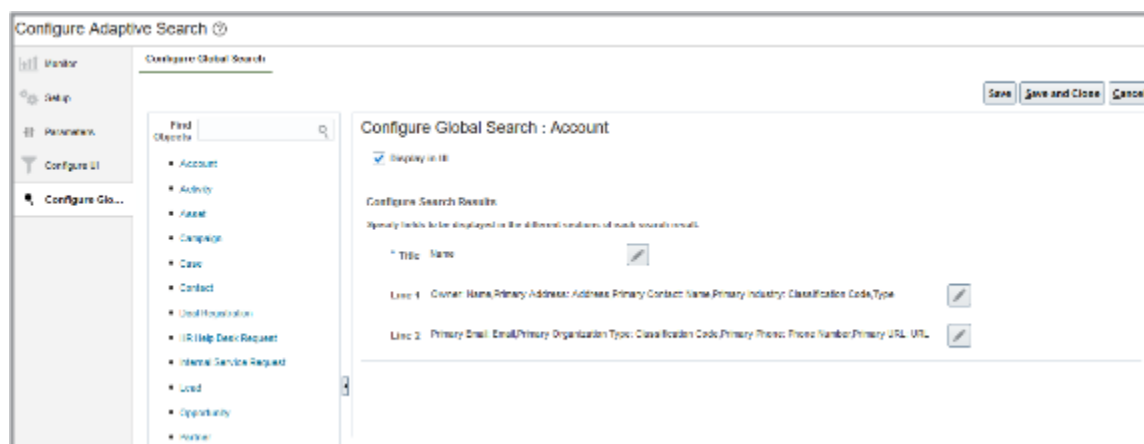
## Configure Global Search

Global search enables you to search for any object to which you have access across Sales and Fusion Services. Searches are performed across various fields and related objects and across custom fields. Results can be filtered based on objects and Last Updated Date.

Once you enable global search to use the adaptive search engine, you can use the **Configure Global Search** tab to:

- Configure objects to be included in Global search.
- Define attributes to be included in the search results.
- Define the format and content of Title, Line 1, and Line 2 of each matching record's search result.

For more information about how to enable Global Search, see the topics in the Global Search section of the Global and Work Area Search chapter of the sales Implementation Reference guide.



## Overview of Adaptive Search Setup

Here's a summary of the setup steps for enabling and configuring Adaptive Search.

You must have the Application Implementation Consultant job role to complete the setup. Only the first step is required.

When you enable business objects for Adaptive Search or change the way search is implemented, you must run the Publish indexing process for the changes to take effect. Other setups take immediate effect.

| Step | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Publish Required? | Where to Get More Details                                                                                                                                                                                                                            |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1    | <p>Open the Configure Adaptive Search task and select the objects you want on the Setup Quick tab.</p> <p>To use the configuration provided by Oracle, click <b>Publish</b> to run the indexing process. Workspace is ready for use and accessible from the home page after the process completes. You can monitor the process progress by clicking the Publish link on the Monitor tab.</p>                                                                                                                         | Yes               | <p>See the following topics in this chapter:</p> <ul style="list-style-type: none"> <li><a href="#">What are the Adaptive Search setup UI components?</a></li> <li><a href="#">How do I monitor Adaptive Search background processes?</a></li> </ul> |
| 2    | <p>You can modify how search operates on the Setup Advanced tab of the Configure Adaptive Search page. For example, you can specify which fields of an object and its related objects can be used in searches and displayed as search filters. Because Oracle configures the fields for you, setup is optional unless you want to enable search on custom child objects and fields, or to change Oracle's default search configuration.</p> <p>You must run the Publish process for your changes to take effect.</p> | Yes               | <p>See <a href="#">How Search Action is Modified</a> and related topics.</p>                                                                                                                                                                         |

| Step | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Publish Required? | Where to Get More Details                                                                                                                                                                                                                                                                                                |
|------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 3    | <p>You can configure search filters on the Configure UI tab of the Configure Adaptive Search page. You can:</p> <ul style="list-style-type: none"><li>Specify which fields can be used as filters in UI searches and for display in search results.</li><li>Define groupings of filter values for use during search.</li></ul> <p>For example, you can break down opportunities by revenue ranges: 0 to 10,000, 10,000 to 100,000, 100,000 to 500,000, and 500,000 and up.</p> | No                | <p>See the following topics in this chapter:</p> <ul style="list-style-type: none"><li><a href="#">Create Groupings of Values for Display in Search Filters</a></li><li><a href="#">Enable Fields for Display as Filters and Search Result Columns</a></li><li><a href="#">Set Up Search Results in Groups</a></li></ul> |
| 4    | <p>You can create and share saved searches for different roles in the organization. You must open Workspace to complete this setup.</p>                                                                                                                                                                                                                                                                                                                                        | No                | <p>See the <a href="#">How do I create and manage saved searches?</a> topic.</p>                                                                                                                                                                                                                                         |

## Enable Business Objects for Adaptive Search

Enabling a business object builds a search index and makes the object available for Workspace, enables navigation from the business object icon to the work area powered by Adaptive Search, and makes the object available for Global Search, REST web services, and Workspace infolets.



Watch video

How Adaptive Search is used varies by object. Some objects are available through REST web services only. For more details, see [Overview of Adaptive Search](#). Here's how to enable business objects for Adaptive Search.

1. In the Setup and Maintenance work area, open the **Configure Adaptive Search** task:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Show: All Tasks
  - Task: Configure Adaptive Search

**Note:** If this is your first time configuring Adaptive Search, then with the Sales Foundation functional area selected, click **Actions** and then select **Change Feature Selection** from the list. In the Edit Features: Sales Foundation page, click **Enable for Configure Adaptive Search** and click **Done**.

2. On the Configure Adaptive Search page, click the **Setup** tab.
3. On the Setup tab, **Quick** subtab, select the objects you want to enable for Adaptive Search:

- Account
- Activity
- Asset
- Case - (available only in Adaptive Search REST API)
- Campaign
- Competitor - (this unique object doesn't have a list page of its own in Workspace)
- Contact
- Deal Registration
- HR Help Desk Request - (available only in Adaptive Search REST API)
- Installed Base Asset- (available only in Adaptive Search REST API)
- Internal Service Request - (available only in Adaptive Search REST API)
- Lead
- Opportunity
- Partner
- Partner Contact
- Product (available only in Adaptive Search REST API)
- Product Group (available only in Adaptive Search REST API)
- Quotes and Orders
- Quote and Order Line
- Revenue Lines
- Service Request
- Territory
- Work Order (available only in Adaptive Search REST API)

Enabling an object enables any custom child objects and any custom fields you created. Not all the objects are sales objects. Partner and Partner Contact are only pertinent for Partner Relationship Management. HR Help Desk Request, Internal Service Request, and Service Request are specific to Fusion Service. The Case, HR Help Desk Request, Installed Base Asset, Internal Service Request, Product, Product Group, and Work Order objects can be enabled for REST web services only.

**Note:** Making the selection on the **Quick** tab enables the default search configuration. Use the **Advanced** tab to modify search behavior and to enable custom objects.

4. By default, the objects you enable on the Quick subtab are enabled in all the UIs that use Adaptive Search as well. You can disable objects from appearing in those UIs using the **Configure UI** and **Configure Global Search** tabs, but keep them available for REST web services.



## 5. Click **Publish**.

Your action runs an indexing process and an hourly index refresh for the objects you selected. You can monitor the progress of the indexing process on the **Monitor** tab. The process can take several minutes to complete, depending on your data volume.

**Note:** You can choose to publish only those objects for which you have changed the configuration. This avoids having to perform a full publish every time a configuration change is done, thus saving a lot of time.

## 6. Click the **Monitor** tab and **Publish** subtab to monitor the process. After the process completes with a status of succeeded, the Workspace icon appears on the home page. If the process completes with errors, contact your help desk.

# How do I switch to Work Areas powered by Adaptive Search

Here's how existing customers can switch from the legacy work areas to the new work areas powered by Adaptive Search. No action is required for new customers who get the new work areas by default.

You must complete these steps:

- Use the Opt In UI to enable this feature.
- Make sure that the business objects for the work areas are indexed.
- You select the **Display Object in Workspace** check box on the Configure UI tab in the Configure Adaptive Search page.

See the Configure UI section of "A Quick Rundown of the Adaptive Search Setup UI" topic for more information.

**Note:** Salespeople granted the View Fuse List as Default List Pages (ZCA\_VIEW\_FUSE\_LIST\_PAGES) privilege, are taken to the legacy work areas that use CRM Search technology instead of the new ones.

## Opt in to Enable Work Areas Powered by Adaptive Search

Here's how existing customers can enable navigation to the new work areas that use Adaptive Search.

1. Sign in as a setup user.
2. In the Setup and Maintenance area, go to the Sales offering.
3. Select the **Change Feature Opt In** from the **Sales Foundation** functional area and open the **Edit Features: Sales Foundation** page.
4. In the Features column, locate **Open Work Areas Powered by Adaptive Search**.
5. Click the pencil icon and select the **Enable** check box.
6. Click **Done**.

For more information, see the New Feature Opt-In section of the Oracle Applications Cloud - Using Functional Setup Manager guide on the Oracle Help Center ([docs.oracle.com](https://docs.oracle.com)).

## How do I monitor Adaptive Search background processes?

Adaptive Search requires several background processes to run periodically. You can monitor these processes on the Monitor UI tab of the Configure Adaptive Search page. For example, you can view the real-time progress of Adaptive Search indexing jobs.

When you click Publish, a progress bar indicates how much of the indexing job has been processed and what percentage remains before completion. This feature provides have better visibility on the **Publish** job progress so that you can plan your operations accordingly.

**Note:** If you update job request parameters after a job is submitted, then the results displayed on the progress bar might be unreliable.

You also receive email notifications about the status of Publish jobs for Adaptive Search if scheduled jobs haven't completed within a 12 hour time frame. For example, you're notified about the successful completion of published processes or receive an alert of failed processes that might be causing issues with data access. Emails are sent to the user who submitted the last successful publish job, periodic job, or to the user who submitted the first successful publish job if the scheduler process data isn't already purged. You can also specify more email addresses when you schedule the publish job.

**Note:** If you want, you can reschedule all Adaptive Search jobs to run under a different user. You just need to cancel the parent job for all the jobs and sign in with the new user for the scheduler process jobs and reschedule them.

The Monitor UI tab includes sub tabs where you can monitor the processes. The following table describes the processes, provides a recommended run schedule, and explains what actions you can take on each tab.

**Note:** Oracle recommends that you perform a full publish each time you do a production to test (P2T) environment refresh. When the full publish job completes successfully, your Adaptive Search configuration becomes the latest active meta model. This ensures that users have the latest features and enhancements and aren't limited in functionality due to an older version of an active meta model being in use. The recommended schedule for some processes might vary according to your business requirements, existing run assignments, and data load schedules.

| Process and Tab Name | Process Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Recommended Schedule | Available Actions                                                                                                                                                                                                                                                                  |
|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Periodic Refresh     | Indexing enables Adaptive Search to find records based on keyword search terms entered, search filters, saved search criteria, and other search criteria. Periodic Refresh enables Adaptive Search to search for imported records and records that have gone through the mass update process. While records you create and update in the UI are automatically indexed and made searchable within seconds, imported records or records updated by background processes aren't available for search until the process completes. | Every hour           | <ul style="list-style-type: none"><li>Change the process frequency by clicking <b>Schedule Periodic Refresh</b>.</li><li>Start the process immediately by clicking <b>Start Process</b>.</li><li><b>Cancel Process</b> cancels the instance of the process you selected.</li></ul> |

| Process and Tab Name                     | Process Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Recommended Schedule                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Available Actions                                                                                                                                                                                                                                                                                                                                             |
|------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                          | <p><b>Note:</b><br/>The <b>Publish</b> process should be completed before running the Periodic refresh.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                               |
| Publish                                  | <p>Publishes the Adaptive Search configuration you set up in the Quick Setup and Advanced Setup UIs.</p> <p><b>Note:</b><br/>For CLOB (Character Large Object) fields, only the first 4000 characters are indexed.</p> <p>New CLOB fields are no longer supported in Workspace.</p> <p><b>Note:</b><br/>Formula fields can't be configured.</p> <p>Also generated ID fields aren't available to enable for any objects in Adaptive Search.</p> <p>For example, you can't search on ID fields in Workspace such as Party ID, SR ID, Opty ID, Record ID for custom object, and so on. Such fields aren't searchable and can't be indexed by design.</p> | <p>You must click <b>Publish</b> to run the process each time you:</p> <ul style="list-style-type: none"> <li>Make changes on the Setup tab.</li> <li>Perform a production to test (P2T) environment refresh</li> </ul> <p>Here are the different phases you can monitor from the progress bar:</p> <ul style="list-style-type: none"> <li>Preparing for Indexing</li> <li>Indexing in Progress</li> <li>Updating References</li> <li>Updating Latest Changes</li> <li>Activating Indexes</li> <li>Completed</li> </ul> <p>Your changes become effective when the process completes.</p> | <p>You can monitor the progress of the publish process. Your configuration is active when the process completes successfully.</p> <p>If the process fails to complete successfully, contact your help desk.</p>                                                                                                                                               |
| Maintenance                              | <p>Backs up the current active meta model, removes older snapshots, and cleans up any search server index or snapshots that aren't associated with any workflow state of the meta model.</p> <p><b>Note:</b><br/><b>Restore from Backup</b> is disabled if a meta model is being published.</p>                                                                                                                                                                                                                                                                                                                                                       | Daily                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <p>You can restore the current active Adaptive Search configuration by clicking <b>Restore from Backup</b>. This action clears any saved changes that aren't yet published.</p> <p>To restore the last active Adaptive Search configuration version, click <b>Revert to Previous Version</b>.</p> <p>Any other actions should be taken by your help desk.</p> |
| Territory and Resource Hierarchy Refresh | Updates the index with sales territory and resource hierarchy changes.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | Weekly                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <ul style="list-style-type: none"> <li>Change the process frequency by clicking <b>Schedule Periodic Refresh</b>.</li> </ul>                                                                                                                                                                                                                                  |

| Process and Tab Name          | Process Description                        | Recommended Schedule                                                                                                                                                                                 | Available Actions                                                                                                                                                                                                                                                                      |
|-------------------------------|--------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               |                                            |                                                                                                                                                                                                      | <ul style="list-style-type: none"> <li>Start the process immediately by clicking <b>Start Process</b>.</li> <li><b>Cancel Process</b> cancels the instance of the process you selected.</li> </ul>                                                                                     |
| Update Aggregates             | Updates the index with total changes.      | Weekly or as required.                                                                                                                                                                               | <ul style="list-style-type: none"> <li>Change the process frequency by clicking <b>Schedule Periodic Refresh</b>.</li> <li>Start the process immediately by clicking <b>Start Process</b>.</li> <li><b>Cancel Process</b> cancels the instance of the process you selected.</li> </ul> |
| Synchronize Access Rules Data | Updates access group object sharing rules. | Automatically runs when a job, Perform Object Sharing Rule Assignment Processing, or job set is submitted for a batch of access group object sharing rules for all the available assignment objects. | Depending on your requirements, you can change the process frequency by clicking <b>Schedule Periodic Refresh</b> . You can also manually Start or Cancel the process at any time.                                                                                                     |

**Note:** The Publish and Periodic Refresh indexing processes include records based on the following condition:

`LAST_UPDATE_DATE is greater than (CURRENT DATE - MAX_AGE_IN_DAYS) days.`

For example, in the case of opportunity records, this means that only those opportunities that were created and updated within the last 365 days are indexed and available for viewing in Workspace. If you want to view records older than 365 days for your specific object, you need to update the MAX\_AGE\_IN\_DAYS entity to a greater number than 365.

## How To Change Periodic Refresh Frequency

The default periodic refresh process runs every hour. However, you might want to change the frequency to run every 15 minutes so that any new records quickly appear in your Workspace saved searches.

Here's how to change the periodic refresh frequency.

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Configure Adaptive Search
3. From the **Configure Adaptive Search** page, click **Monitor > Periodic refresh**.
4. Select the job row which is currently running hourly and has a status of **Wait**.
5. Click **Schedule Periodic Refresh**.
6. Click **Change Frequency** and adjust the schedule to run every 15 minutes or per your specific requirement.

## Adaptive Search Meta Model Types

Adaptive search saves the published configuration so you can restore the behavior you had before. Or you can restore to the seeded one. Meta models encode the information that's necessary to index the entities that are searched.

Adaptive Search supports the following meta models, each with a distinct workflow state.

- **Seeded Meta Model**  
A ready to use model that's shipped to customers. You can click **Restore Defaults** to revert to the predefined meta model.
- **Sandbox Meta Model**  
A modified version of the Adaptive Search configuration is stored and saved when you make changes to the configuration and click **Save** or **Save and Close**.
- **Being Published Meta Model**  
When the configuration changes are saved and you click **Publish**, the meta model is in a state of being published.
- **Active Meta Model**  
When the full publish job completes successfully, it becomes the active meta model.
- **Archived Meta Model**  
The previous successful version of the configuration becomes the archived meta model. There's only one archived version available.

## Index Date Ranges for Adaptive Search Objects

Adaptive Search objects are categorized into transactional objects and reference objects. Transactional objects store Sales and Fusion Service transactions while reference objects don't. The following sections outline how the search records for both types of objects are indexed.

### Transactional Objects

When indexing transactional object search records for the first time, Adaptive Search only index records that have the "Last Updated Date" within the last 365 days. Thereafter, records that are changed or created from transactional objects are incrementally added to the index. Here's a list of the Adaptive Search transactional objects:

- Activities
- Campaigns
- Case
- Deal Registration
- HR Help Desk Request
- Internal Service Request
- Leads
- Opportunities
- Quotes and Orders
- Quote and Order Lines

- Revenue Lines
- Service Requests
- Work Order

**Note:** Adaptive Search transactional object details are updated asynchronously during Near Real-time Indexing. The asynchronous update happens after the objects in the above list are refreshed.

See the following transactional object examples of what content is indexed for a specific action on a particular date for Opportunity records:

| Date         | Action                                          | Index Content                                                                                             |
|--------------|-------------------------------------------------|-----------------------------------------------------------------------------------------------------------|
| Dec 15, 2018 | Publish job is run                              | Records, which have Last Updated Date > Dec 15, 2017                                                      |
| Jan 10, 2019 | New Opportunity created with name Green Servers | All previously indexed records plus the new opportunity record (Green Servers) created                    |
| Jan 20, 2019 | 20 new opportunities created by an import job   | All previously indexed records plus the 20 new records created (after the periodic refresh job completes) |

## Reference Objects

All records from the reference objects are indexed. Custom objects are treated as reference objects and hence all of their records are indexed. Here's a list of the Adaptive Search Reference objects:

- All custom objects
- Account
- Asset
- Contact
- Installed Base Asset
- Partner
- Partner Contact
- Product
- Product Group
- Territory

## How do I edit Adaptive Search parameters?

You can configure how Adaptive Search works and control how the Workspace interface operates using the Parameters tab available in the Adaptive Search setup page.

Modify the parameters to define the way the Adaptive search engine operates and runs the search indexing. For example, you can perform a partial publish to enable you to publish only those objects that have configuration modifications. This avoids having to perform a full publish every time a configuration change is done thus saving time.

Some of the parameters you can modify include timeouts, fetch sizes, maximum number of batches and so on. You can change parameters so that the indexing process runs successfully based on the server size and the volume of data to be indexed.

Parameter settings include the ability to enable mass actions and record-level navigation, specify the fuzziness level for search, set the default number of records to be displayed per page, and set the maximum number of records to export at one time. For example, you might want to modify parameter values for the following:

- Set the maximum columns allowed in the Workspace list page
- Enable Group By in Workspace
- Enable Mass Actions
- Enable Mass Update
- Enable record level navigation
- Fuzziness Level
- Maximum Number of Records for Export
- Number of records displayed per page in Workspace
- Enable Partial Publish

You can also choose to change current and default values. Here's how to edit Adaptive Search parameters.

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Configure Adaptive Search

- On the **Configure Adaptive Search** page, click the **Parameters** tab.

| Parameter Name                                              | Minimum Value | Maximum Value | Default Value | Current Value |
|-------------------------------------------------------------|---------------|---------------|---------------|---------------|
| Decouple incremental job at the end of Publish              | -             | -             | N             | N             |
| Enable Group By in Workspace                                | -             | -             | N             | Y             |
| Enable Keyword Highlighting in Workspace                    | -             | -             | Y             | Y             |
| Enable Mass Actions                                         | -             | -             | Y             | Y             |
| Enable Mass Update                                          | -             | -             | N             | Y             |
| Enable record level navigation                              | -             | -             | Y             | Y             |
| Fuzziness Level                                             | None          | Two           | One           | One           |
| Lookup Type Cache Concurrency Level                         | 1             | 10            | 2             | 2             |
| Lookup Type Cache Initial Capacity                          | 16            | 10000         | 16            | 16            |
| Lookup Type Cache Load Factor                               | 0.5           | 1.0           | 0.75          | 0.75          |
| Maximum Number of Records for Export                        | 1             | 10000         | 2000          | 2000          |
| Maximum number of records that can be selected in Workspace | 1             | 25            | 10            | 10            |
| Enable Partial Publish                                      | -             | -             | Y             | Y             |
| Search Filter Limit                                         | 1             | 10            | 6             | 6             |
| Shard maximum size required for index in GB                 | 1             | 9999          | 45            | 45            |

- Highlight the **Parameter Name** that you want to change and click **Edit**. This warning is displayed.

You're about to change parameters that control how Adaptive Search works. Changes should only be carried out by search setup experts. Do you want to continue?

- Click **Yes**.
- In the **Current Value** field, makes the changes that you require and click **Save and Close**.

This table outlines the list of Adaptive search parameters available and shows the minimum, maximum, and default values.

| Parameter Name                                 | Description                                                                                                                                                                                                                                                                                                                | Minimum Value | Maximum Value | Default Value |
|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|---------------|---------------|
| Decouple incremental job at the end of Publish | At the end of a Publish process, a periodic refresh is run so that any records updated during the Publish process get updated. By default the decouple parameter is set to N which means that the periodic job is run after the Publish process. Change this parameter to Y if you don't want the periodic process to run. | None          | None          | N             |



| Parameter Name                                            | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Minimum Value | Maximum Value | Default Value |
|-----------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|---------------|---------------|
| Enable Group By in Workspace                              | Enable this parameter to view search results in groups based on specific fields on the object or related objects. Salespeople get an overview of the number of records in each Grouped By grouping and they can search and filter records within these groupings. They can also view aggregates such as count, average, and sum of values on the records of each group.                                                                                                                         | None          | None          | N             |
| Enable Keyword Highlighting in Workspace                  | Setting this parameter means that any keywords entered in the Search box are highlighted in the search results returned in Workspace.                                                                                                                                                                                                                                                                                                                                                           | None          | None          | Y             |
| Enable CJK Language Detection for Non-Translatable Fields | You can perform a search on untranslatable name fields such as Account Name or Contact Name that contain Chinese, Japanese and Korean characters.                                                                                                                                                                                                                                                                                                                                               | None          | None          | N             |
| Enable Mass Actions                                       | You can perform some actions on multiple records at the same time. For example, you can select multiple leads in Workspace and qualify them at once by selecting the Qualify action.                                                                                                                                                                                                                                                                                                            | None          | None          | Y             |
| Enable Mass Update                                        | <p>You can update multiple records at the same time. This saves you time and helps improve efficiency. For example, you might want to update the close date for opportunity records at the same time or change the Lead rank from Cool to Warm for a number leads.</p> <p>Use the <b>Configure UI</b> tab from the Configure Adaptive Search page to specify which fields to enable for mass update. In addition, ensure that you select the <b>Mass Update</b> check box and have at least</p> | None          | None          | N             |

| Parameter Name                                                             | Description                                                                                                                                                                                  | Minimum Value | Maximum Value | Default Value |
|----------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|---------------|---------------|
|                                                                            | four fields selected for both standard and custom objects.                                                                                                                                   |               |               |               |
| Enable record level navigation                                             | You can use <b>Previous</b> and <b>Next</b> buttons on the record details page to navigate lists of records in Workspace.                                                                    | None          | None          | Y             |
| Enable Partial Publish                                                     | Set this parameter to do a publish on selected set of objects without doing a full publish.                                                                                                  | None          | None          | N             |
| Fuzziness Level                                                            | This parameter defines the number of character edits that's considered when a keyword search is performed. For a value of 1, the search term "redwood" returns Redwood in the search result. | None          | Two           | One           |
| Initial target shard size required for index in GB                         | This parameter lets you set the initial target shard size for your search index file. 30 GB is the predefined value.                                                                         | 1             | 9999          | 30            |
| Lookup Type Cache Concurrency Level                                        | You can configure the Adaptive search lookup caching to build pipelines concurrently when the lookup table or index file is large. The default number of pipelines is 2.                     | 1             | 10            | 2             |
| Lookup Type Cache Initial Capacity                                         | Set the initial capacity for the concurrent hash map that's used for the lookup type cache.                                                                                                  | 16            | 10000         | 16            |
| Lookup Type Cache Load Factor                                              | You can modify the cache load factor for the lookup type cache. The default factor is 0.75.                                                                                                  | 0.5           | 1.0           | 0.75          |
| Maximum Number of Columns to Optimize Column Sizing in Workspace/List Page | Select the maximum number of columns for optimal sizing in Workspace list pages. The default is 8 columns to optimize column sizing.                                                         | 1             | 20            | 8             |

| Parameter Name                                                                    | Description                                                                                                                                                                                                                                                                                 | Minimum Value | Maximum Value | Default Value |
|-----------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|---------------|---------------|
| Maximum columns allowed in the Workspace/List Page                                | Adjust the number of saved search columns to display in Workspace list pages. The default is 20 columns.                                                                                                                                                                                    | 1             | 40            | 20            |
| Maximum Number of Records for Export                                              | This parameter represents the maximum number of records to save to the desktop in a single Export action by users.                                                                                                                                                                          | 1             | 10000         | 2000          |
| Maximum number of records that can be selected in Workspace                       | This parameter enables you to change the maximum number of records that can be selected in Workspace to perform a mass action. The default number is 10 records and you can select up to 25 records.                                                                                        | 1             | 25            | 10            |
| Minimum Characters to type in Search Box before Suggestions Filters are displayed | This parameter lets you change the minimum number of characters that you must include in the Search box before the suggestion filters are displayed. The default minimum value is 1 character. A value of 0 means the Filter Suggestions display immediately on clicking in the search box. | 0             | 100           | 1             |
| Number of records displayed per page in Workspace                                 | You can change the number of records displayed on the search results page from the default value of 25 records up to a maximum of 100 records.                                                                                                                                              | 1             | 100           | 25            |
| Screen Width in Pixels to Optimize Column Sizing in Workspace/List Page           | Adjust the screen width in pixels to optimize the size of columns displayed in Workspace list pages. The default value is set as auto, which means that the screen will automatically adjust to the number of columns on the page.                                                          | 1280          | 3840          | Auto          |
| Search Filter Limit                                                               | Set the number of filters you can include for your search. The default number of filters is 6.                                                                                                                                                                                              | 1             | 10            | 6             |

| Parameter Name                              | Description                                                                                      | Minimum Value | Maximum Value | Default Value |
|---------------------------------------------|--------------------------------------------------------------------------------------------------|---------------|---------------|---------------|
| Shard maximum size required for index in GB | This parameter lets you set the shard maximum size for your search index file in gigabytes (GB). | 1             | 9999          | 45            |

#### Related Topics

- [How do I access Workspace data offline?](#)

## How To Publish a Limited Set of Objects in Adaptive Search

You can choose to publish only those objects which have changed their configuration by performing a partial publish. This avoids having to perform a full publish every time there is a configuration change.

This significantly reduces the publishing time when changing Adaptive Search configuration or when adding new objects to your Workspace or other work areas powered by Adaptive Search.

For example, you have enabled 2 additional objects, Asset and Partner. You also made changes to the Account and Opportunity search configuration. If you have enabled the partial publish parameter, then instead of having to do a full publish of Adaptive search, you can now select and republish only both the additional enabled objects and the updated objects. The **Enable Partial Publish** parameter is enabled by default, but if you want to disable it, do the following:

1. Sign in as a user with an administrator or setup role.
2. Go to the **Configure Adaptive Search** setup task.
3. Click the **Parameters** tab.
4. Click **Edit** to enable edit mode on the page.
5. Update the value of **Enable Partial Publish** from Y to N.
6. Click **Save**.

### Partial Publish a Limited Set of Objects

Once you have the **Enable Partial Publish** parameter enabled, you can choose to perform a partial publish on a selected set of objects without doing a full publish.

**Note:** Whenever a quarterly update happens, the Adaptive Search configuration version isn't updated unless a Full Publish is done. In such a situation, the runtime searching isn't affected and will continue to work. However, the partial publish feature won't be available. If you need to make any changes, you will have to do a Full Publish once to bring the configuration version to the latest version and only then can a Partial Publish be performed. If performing a CSM, a full publish is automatically started and when complete, you can make any changes to your configuration using the partial publish feature.

Here are the steps to perform a partial publish.

1. Sign in as a user with an administrator or setup role.
2. Go to the **Configure Adaptive Search** setup task.
3. From the Configure Adaptive Search page, click **Setup > Advanced**.
4. From the **Actions** menu, select **Partial Publish**.
5. Select only those objects you want to republish and click **Proceed with Partial Publish**.

6. Review your partial publish selections from the **Partial Publish** dialog and then click **Publish**.

## Enable the Favorite Field for Quick Access to Records

You can designate records as favorites so that salespeople can quickly reach them to view and edit the records that they want.

Once you enable the favorite field for specific objects, then salespeople can add a filter for favorite records in the Workspace UI to help improve the speed to reach records.

Enable the Favorites field on the object for which you want salespeople to have easy access to frequently used records:

1. Sign in to the application as a sales administrator or a setup user.
2. Go to the **Configure Adaptive Search** task in Setup and Maintenance.
3. Click **Setup** and then the **Advanced** subtab.
4. Select the business object you want and from the **Configure Fields:** area, search for the Favorite field.
5. Select the **Enable** check box to enable the Favorite field for the selected business object.
6. Repeat steps 4 and 5 to enable the Favorite fields for all the other business objects.
7. Click **Save** and then click **Publish**.

Once enabled, from the Workspace UI, salespeople can change the columns that display for their search results. For example, they can add the Favorite column to display on the search results page and in what order by clicking Edit Column (the pencil icon).

1. From the Edit Columns page, search for Favorite.
2. Select **Favorite** and move from the Available area to the Selected area.
3. Click **OK**.

Those records that are marked as favorites are represented by a color-filled star icon. Those items not marked as favorites have a clear star icon. You can remove and add items to suit your requirements. When selected, the clear star icon changes to a filled star. You can also change the width of the columns by dragging their sides. Your preferences can be saved as part of a saved search.

### *Related Topics*

- [How Users Mark Favorite Records](#)

## How to Migrate Your Adaptive Search Configurations from Test to Production Environments

You can migrate your Adaptive Search configuration along with other configurations from your test environment to your production environment. From the Navigator, select Configuration Migration . For more detailed information, see the section Moving Application Changes in the Configuring Applications Using Application Composer guide.

To include the Adaptive Search configuration in your configuration migration, select the **Workspace Configuration** option. Before you migrate any changes, you must ensure that:

- ZCA\_MANAGE\_INTERACTIVE\_LISTS\_SAVED\_SEARCH privilege is assigned to your role
- All changes are published on the target environment.
- There's no publish job in progress.

**Note:** For CSM export, you must first run a publish job from Configure Adaptive Search to ensure that the active meta model version is updated to the latest release.

An error occurs if a publish job is in progress and if a Configuration Set Migration (CSM) import is triggered. Only migrate changes after your Adaptive Search publish has completed on the target.

Selecting the **Workspace Configuration** option migrates all of your Adaptive Search configurations except for saved searches you created. You must recreate any custom saved searches in the production environment after the migration is complete.

Trigger the CSM import on the customer environment only when all published jobs are in a successful state. After the successful completion of your CSM migration:

1. Navigate to your target environment and configure the Workspace UI.
2. Run a **Publish** job to ensure that all changes are indexed and available to Workspace.

**Note:** Don't manually configure the production environment for the features you're migrating.

## Adaptive Search Configuration Provided by Oracle

Oracle provides you with a default Adaptive Search configuration as outlined here. For each of the supported business objects, the table lists:

- The fields you can add as filters
- The fields you can search using the Search box in all the UIs that use Adaptive Search

Fields in parentheses can be included as filters. For example, you can filter an account by contact name, primary address, primary phone, and so on.

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                            | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                                                                                     |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account         | <ul style="list-style-type: none"><li>• Addresses</li><li>• Contacts</li><li>(Name, Primary Address, Primary Email, Primary Phone)</li><li>• Created By</li><li>• Creation Date</li><li>• Emails</li><li>• Industries</li><li>• Instant Messages</li><li>• Last Updated By</li><li>• Last Updated Date</li><li>• Name</li><li>• Organization Types</li><li>• Owner</li></ul> | <ul style="list-style-type: none"><li>• Name</li><li>• Primary Address</li><li>• Primary Contact</li><li>(Name, Primary Address, Primary Email, Primary Phone)</li><li>• Primary Email</li><li>• Primary Industry</li><li>• Primary Instant Message</li><li>• Primary Organization Type</li><li>• Primary Phone</li><li>• Primary URL</li><li>• Registry ID</li></ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                                              |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>• Phones</li> <li>• Primary Address</li> <li>• Primary Contact</li> </ul> <p>(Name, Primary Address, Primary Email, Primary Phone)</p> <ul style="list-style-type: none"> <li>• Primary Email</li> <li>• Primary Industry</li> <li>• Primary Instant Message</li> <li>• Primary Organization Type</li> <li>• Primary Phone</li> <li>• Primary URL</li> <li>• Record Set</li> <li>• Registry ID</li> <li>• Team Members</li> <li>• Type</li> <li>• URLs</li> </ul>                                                                                                                                                                                                   |                                                                                                                                                                                                                                                                                                                                |
| Activity        | <ul style="list-style-type: none"> <li>• Account (Name, Primary Address)</li> <li>• Activity</li> <li>• Asset (Asset Number, Serial Number)</li> <li>• Call Report Count</li> <li>• Consumer</li> <li>• Contacts</li> </ul> <p>(Name, Primary Address, Primary Email, Primary Phone)</p> <ul style="list-style-type: none"> <li>• Created By</li> <li>• Creation Date</li> <li>• Date</li> <li>• Delegated By</li> <li>• Description</li> <li>• Dismiss</li> <li>• Due Date</li> <li>• Last Updated By</li> <li>• Last Updated Date</li> <li>• Lead (Lead Name)</li> <li>• Location</li> <li>• Meeting Minutes</li> <li>• Opportunity (Name)</li> <li>• Owner</li> <li>• Primary Contact (Name)</li> </ul> | <ul style="list-style-type: none"> <li>• Account (Name, Primary Address)</li> <li>• Consumer</li> <li>• Description</li> <li>• Meeting Minutes</li> <li>• Owner</li> <li>• Primary Contact</li> </ul> <p>(Name, Primary Address, Primary Email, Primary Phone)</p> <ul style="list-style-type: none"> <li>• Subject</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Fields Enabled for the Search Box                                                                                                                                                                                                                                      |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Priority</li> <li>Private</li> <li>Record Set</li> <li>Start Date</li> <li>Status</li> <li>Subject</li> <li>Team members</li> <li>Type</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                        |
| Asset           | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Asset Name</li> <li>Asset Number</li> <li>Competitor Asset</li> <li>Consumer</li> <li>Contacts</li> <li>(Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Description</li> <li>End Date</li> <li>Install Date</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Manufacturer</li> <li>Model</li> <li>Product</li> <li>Product Group</li> <li>Purchase Date</li> <li>Purchase Unit Price</li> <li>Quantity</li> <li>Record Set</li> <li>Serial Number</li> <li>Status</li> <li>Team Members</li> <li>Version</li> <li>Year</li> </ul> | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Asset Name</li> <li>Asset Number</li> <li>Consumer</li> <li>Description</li> <li>Manufacturer</li> <li>Model</li> <li>Product</li> <li>Product Group</li> <li>Serial Number</li> </ul> |
| Campaign        | <ul style="list-style-type: none"> <li>Actual Cost</li> <li>Budgeted Cost</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | <ul style="list-style-type: none"> <li>Campaign Number</li> <li>Description</li> </ul>                                                                                                                                                                                 |



| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Fields Enabled for the Search Box                                                                                                                                            |
|-----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>• Campaign Created By</li> <li>• Campaign Creation Date</li> <li>• Campaign Last Update Date</li> <li>• Campaign Last Updated By</li> <li>• Campaign Number</li> <li>• Created By</li> <li>• Created by Module</li> <li>• Creation Date</li> <li>• Description</li> <li>• End Date</li> <li>• Last Updated By</li> <li>• Last Updated Date</li> <li>• Name</li> <li>• Owner</li> <li>• Parent Campaign</li> <li>• Product Description</li> <li>• Region Code</li> <li>• Source System Campaign ID</li> <li>• Start Date</li> <li>• Status</li> <li>• Total Leads</li> <li>• Total Opportunities</li> <li>• Total Opportunities Revenue</li> <li>• Type (Campaign Number, Name, and Status)</li> </ul> | <ul style="list-style-type: none"> <li>• Name</li> <li>• Origin</li> <li>• Parent Campaign</li> <li>• Source System Campaign ID</li> <li>• Status</li> <li>• Type</li> </ul> |
| Case            | <ul style="list-style-type: none"> <li>• Account (Name, Primary Address)</li> <li>• Activity ID</li> <li>• Actual Start Date</li> <li>• Address Line 1</li> <li>• Assigned To (Name, Primary Email, Primary Phone)</li> <li>• City</li> <li>• Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>• Contact Name</li> <li>• Country</li> <li>• Created By</li> <li>• Creation Date</li> <li>• Email</li> </ul>                                                                                                                                                                                                                                                                                                            | <ul style="list-style-type: none"> <li>• Reference Number</li> </ul>                                                                                                         |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Fields Enabled for the Search Box                      |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Estimated Start Date</li> <li>Favorite</li> <li>Field Service Resource (Name, Primary Email, Primary Phone)</li> <li>Integration</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Partner Account (Name, Primary Address)</li> <li>Phone</li> <li>Postal Code</li> <li>Primary Asset (Asset Number, Serial Number)</li> <li>Product (Name)</li> <li>Product Group (Name)</li> <li>Record Set</li> <li>Reference Number</li> <li>Requested Date</li> <li>Requested Date and Start Time</li> <li>Requested Time Slot</li> <li>Resolution Due</li> <li>Scheduled Date</li> <li>Scheduled Date and Start Time</li> <li>Scheduled Time Slot</li> <li>Service Request (Channel Type, Owner Type, Reference Number, Stripe Code, Title)</li> <li>State</li> <li>Status</li> <li>Time Zone</li> <li>Title</li> <li>Work Order Area</li> <li>Work Order Integration Status Code</li> <li>Work Order Status (Status, Status Category)</li> <li>Work Order Type (Work Order Type Code)</li> </ul> |                                                        |
| Competitor      | <ul style="list-style-type: none"> <li>Country Name</li> <li>Created By</li> <li>Creation Date</li> <li>Last Updated By</li> <li>Last Updated Date</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | <ul style="list-style-type: none"> <li>Name</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Fields Enabled for the Search Box                                                                                                                                                                                                                                                       |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Name</li> <li>Registry ID</li> <li>SIC Code</li> <li>Status</li> <li>Threat Level</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                                                         |
| Contact         | <ul style="list-style-type: none"> <li>Affinity</li> <li>Annual Income</li> <li>Buying Role</li> <li>Contact Role</li> <li>Created By</li> <li>Creation Date</li> <li>First Name</li> <li>Job Title</li> <li>Last Contact Date</li> <li>Last Name</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Middle Name</li> <li>Name</li> <li>Owner</li> <li>Preferred Contact Method</li> <li>Primary Account (Name, Primary Address)</li> <li>Registry ID</li> <li>Registration Status</li> <li>Sales Profile Status</li> <li>Type</li> <li>Accounts (Name, Primary Address)</li> <li>Addresses</li> <li>Emails</li> <li>Instant Messages</li> <li>Phones</li> <li>Primary Address</li> <li>Primary Email</li> <li>Primary Instant Message</li> <li>Primary Phone</li> <li>Primary URL</li> <li>Record Set</li> <li>Team Members</li> </ul> | <ul style="list-style-type: none"> <li>First Name</li> <li>Job Title</li> <li>Last Name</li> <li>Middle Name</li> <li>Name</li> <li>Primary Address</li> <li>Primary Email</li> <li>Primary Instant Message</li> <li>Primary Phone</li> <li>Primary URL</li> <li>Registry ID</li> </ul> |

| Business Object   | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Fields Enabled for the Search Box                                                                                                                                                                                                              |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | <ul style="list-style-type: none"> <li>URLs</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                                                                                                                                                |
| Deal Registration | <ul style="list-style-type: none"> <li>Approval Decision By (Name, Primary Email, Primary Phone)</li> <li>Approval Decision Date</li> <li>Close Date</li> <li>Contact Email</li> <li>Contact First Name</li> <li>Contact Last Name</li> <li>Created By</li> <li>Creation Date</li> <li>Deal Products (Name)</li> <li>Deal Size</li> <li>Deal Type</li> <li>Existing Account (Name, Primary Address, Registry ID)</li> <li>Existing Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone)</li> <li>Expiration Date</li> <li>Job Title</li> <li>Last Completed Activity</li> <li>Last Completed Call Activity</li> <li>Last Completed Email Activity</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Lead (Lead Name)</li> <li>Name</li> <li>New Account</li> <li>New Contact</li> <li>Next Task Due</li> <li>Number of Completed Activities</li> <li>Number of Completed Call Activities</li> <li>Number of Completed Email Activities</li> <li>Number of Products</li> <li>Number of Team Members</li> <li>Opportunity (Name)</li> <li>Opportunity Account (Account Name, Name, Primary Address)</li> <li>Opportunity Contact (Do not call, Do not contact, Do not email, Do not mail, Name,</li> </ul> | <ul style="list-style-type: none"> <li>Registration Number</li> <li>Existing Contact (Name)</li> <li>Existing Account (Name, Primary Address, Registry ID)</li> <li>Partner (Name, Partner Number, Primary Address)</li> <li>Status</li> </ul> |

| Business Object      | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Fields Enabled for the Search Box                                                              |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
|                      | <ul style="list-style-type: none"> <li>Primary Address, Primary Email, Primary Phone)</li> <li>• Owner (Name, Primary Email, Primary Phone)</li> <li>• Partner (Name, Partner Number, Primary Address, Public Address ID, Public Email ID, Public Fax ID, Public Phone ID)</li> <li>• Partner Type</li> <li>• Record Set</li> <li>• Registration Number</li> <li>• Rejected Comments</li> <li>• Rejected Reason</li> <li>• Returned Comments</li> <li>• Returned Reason</li> <li>• Status</li> <li>• Submitted By (Name, Primary Email, Primary Phone)</li> <li>• Submitted Date</li> <li>• Team Members (Name, Primary Email, Primary Phone)</li> </ul>                                            |                                                                                                |
| HR Help Desk Request | <ul style="list-style-type: none"> <li>• Assigned To (Name, Primary Email, Primary Phone)</li> <li>• Category Name</li> <li>• Channel Type</li> <li>• Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone)</li> <li>• Created By</li> <li>• Creation Date</li> <li>• Critical</li> <li>• Date Closed</li> <li>• Date Reported</li> <li>• Language Code</li> <li>• Last Updated By</li> <li>• Last Updated Date</li> <li>• Messages (Channel Type, Message Content, Posted By)</li> <li>• Outcome Problem</li> <li>• Owner Type</li> <li>• Problem Description</li> <li>• Product (Name)</li> <li>• Product Group (Name)</li> </ul> | <ul style="list-style-type: none"> <li>• Contact (Name)</li> <li>• Reference Number</li> </ul> |

| Business Object          | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Fields Enabled for the Search Box                                                          |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
|                          | <ul style="list-style-type: none"> <li>Queue (Queue Name)</li> <li>Record Set</li> <li>Reference Number</li> <li>Reported By (Name, Primary Email, Primary Phone)</li> <li>Resolution Code</li> <li>Resolution Date</li> <li>Resolved By</li> <li>Severity</li> <li>Solution Description</li> <li>Status Team Members (Name, Primary Email, Primary Phone) Title</li> <li>Status Type</li> <li>Stripe Code</li> <li>Team Members (Name, Primary Email, Primary Phone)</li> <li>Title</li> </ul>                                                                                                                                                                                                                 |                                                                                            |
| Internal Service Request | <ul style="list-style-type: none"> <li>Assigned To (Name, Primary Email, Primary Phone)</li> <li>Category Name</li> <li>Channel Type</li> <li>Contact (Do not call, Do not contact, Do not email, Do not mail, Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Critical</li> <li>Date Closed</li> <li>Date Reported</li> <li>Language Code</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Messages (Channel Type, Message Content, Posted By)</li> <li>Outcome Problem</li> <li>Owner Type</li> <li>Problem Description</li> <li>Product (Name)</li> <li>Product Group (Name)</li> <li>Queue (Queue Name)</li> <li>Record Set</li> </ul> | <ul style="list-style-type: none"> <li>Contact (Name)</li> <li>Reference Number</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Fields Enabled for the Search Box                                                                                                                                                                                    |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Reference Number</li> <li>Reported By (Name, Primary Email, Primary Phone)</li> <li>Resolution Code</li> <li>Resolution Date</li> <li>Resolved By</li> <li>Severity</li> <li>Solution Description</li> <li>Status Team Members (Name, Primary Email, Primary Phone) Title</li> <li>Status Type</li> <li>Stripe Code</li> <li>Team Members (Name, Primary Email, Primary Phone)</li> <li>Title</li> </ul>                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                      |
| Lead            | <ul style="list-style-type: none"> <li>Accepted Date</li> <li>Account (Name, Primary Address)</li> <li>Consumer</li> <li>Contacts (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Conversion Reason</li> <li>Created By</li> <li>Creation Date</li> <li>Deal Size</li> <li>Estimated Close Date</li> <li>Existing Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Lead Name</li> <li>Lead Number</li> <li>Owner</li> <li>Primary Product</li> <li>Primary Product Group</li> <li>Products</li> <li>Qualification Date</li> <li>Rank</li> <li>Reassign Reason</li> <li>Record Set</li> <li>Score</li> </ul> | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Consumer</li> <li>Existing Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Lead Name</li> <li>Rank</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                            |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Source</li> <li>Status</li> <li>Team Members</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                              |
| Opportunity     | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Asset (Asset Number, Serial Number)</li> <li>Close Date</li> <li>Consumer</li> <li>Contacts (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Leads (Lead Name)</li> <li>Line of Business</li> <li>Name</li> <li>Owner</li> <li>Primary Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Primary Revenue</li> <li>Record Set</li> <li>Revenues</li> <li>Sales Stage</li> <li>Status Category</li> <li>Team Members</li> </ul> | <ul style="list-style-type: none"> <li>Line of Business</li> <li>Name</li> <li>Primary Revenue</li> </ul>                                                                                                                                                                                                    |
| Partner         | <ul style="list-style-type: none"> <li>Addresses</li> <li>Created By</li> <li>Creation Date</li> <li>Emails</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Level</li> <li>Name</li> <li>Owner (Name, Primary E-Mail, Primary Phone)</li> <li>Parent Partner (Name, Owner, Partner Number, Primary Address)</li> <li>Partner Contacts</li> <li>Partner Number</li> </ul>                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"> <li>Name</li> <li>Partner Number</li> <li>Primary Address</li> <li>Primary Contact (First Name, Last Name, Middle Name, Name, Primary Address, Primary E-Mail, Primary Phone, Primary URL)</li> <li>Primary E-Mail</li> <li>Primary Phone</li> <li>Primary URL</li> </ul> |



| Business Object  | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Fields Enabled for the Search Box                                                                                                                                                                                               |
|------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | <ul style="list-style-type: none"> <li>• Partner Types</li> <li>• Phones</li> <li>• Primary Address (Address, City, Country, State)</li> <li>• Primary Contact (Name, Primary Address, Primary E-Mail, Primary Phone)</li> <li>• Primary E-Mail</li> <li>• Primary Phone</li> <li>• Primary URL</li> <li>• Record Set</li> <li>• Registry ID</li> <li>• Status</li> <li>• Team Members</li> <li>• URLs</li> </ul>                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                 |
| Partner Contacts | <ul style="list-style-type: none"> <li>• Addresses</li> <li>• Certification Level</li> <li>• Certification Reason</li> <li>• Comments</li> <li>• Created By</li> <li>• Creation Date</li> <li>• Department</li> <li>• Department Code</li> <li>• Duplicate Type</li> <li>• Emails</li> <li>• Enrichment Status</li> <li>• First Name</li> <li>• Internal Job</li> <li>• Title</li> <li>• Last Assigned Date</li> <li>• Last Contact Date</li> <li>• Last Known Location</li> <li>• Last Name</li> <li>• Last Updated By</li> <li>• Last Updated Date</li> <li>• Middle Name</li> <li>• Name Partner (Name, Owner, Partner Number, Primary Address)</li> <li>• Phones</li> <li>• Primary Address (Address, City, Country, State)</li> </ul> | <ul style="list-style-type: none"> <li>• First Name</li> <li>• Last Name</li> <li>• Middle Name</li> <li>• Name</li> <li>• Primary Address</li> <li>• Primary E-Mail</li> <li>• Primary Phone</li> <li>• Primary URL</li> </ul> |

| Business Object      | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Fields Enabled for the Search Box                                                                                                                                                        |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                      | <ul style="list-style-type: none"> <li>Primary E-Mail</li> <li>Primary Phone</li> <li>Primary URL</li> <li>Record Set</li> <li>Registration Status</li> <li>Title</li> <li>URLs</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                                                                                                                                                          |
| Quotes and Orders    | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Active</li> <li>Amount</li> <li>Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Description</li> <li>Last Synchronized</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Name</li> <li>Opportunity (Name)</li> <li>Owner</li> <li>Placed On</li> <li>Quote ID</li> <li>Quote or Order Number</li> <li>Record Set</li> <li>Reference Code</li> <li>Reference Number</li> <li>Status</li> <li>Valid To Date</li> <li>Version</li> <li>Win Status</li> </ul> | <ul style="list-style-type: none"> <li>Name</li> <li>Quote or Order Number</li> </ul>                                                                                                    |
| Quote and Order Line | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Created By</li> <li>Creation Date</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Line Amount</li> </ul>                                                                                                                                                                                                                                                                                                                                           | <ul style="list-style-type: none"> <li>Account</li> <li>Contact</li> <li>Opportunity</li> <li>Order Line Item</li> <li>Product Name</li> <li>Record Set</li> <li>Sales Orders</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                                                                                                                                                        |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>Line Contract End Date</li> <li>Line Contract Value</li> <li>Line Discount</li> <li>Line Price Period</li> <li>Line Price Type</li> <li>Line Request Date</li> <li>Line Status</li> <li>Opportunity (Name, Opportunity Number, Status)</li> <li>Order Line Item</li> <li>Product Name</li> <li>Record Set</li> <li>Sales Orders (Active, Creation Date, Valid To Date, Name, Quote or Order Number, Amount, Status, Win Status)</li> </ul>                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Revenue Lines   | <ul style="list-style-type: none"> <li>Account</li> <li>Amount</li> <li>Best Case</li> <li>Close Date</li> <li>Competitor</li> <li>Conversation Rate</li> <li>Cost</li> <li>Created By</li> <li>Creation Date</li> <li>Discount</li> <li>Estimated Price</li> <li>Expected Delivery Date</li> <li>Expected Revenue</li> <li>Favorite</li> <li>Forecast Territory</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Margin</li> <li>Opportunity</li> <li>Owner</li> <li>Primary Partner</li> <li>Product</li> <li>Product Group</li> <li>Quantity</li> </ul> | <ul style="list-style-type: none"> <li>Account</li> <li>Competitor</li> <li>Created By</li> <li>Forecast Territory</li> <li>Last Updated Date</li> <li>Opportunity</li> <li>Owner</li> <li>Primary Partner</li> <li>Product</li> <li>Product Group</li> <li>Recurrence Type Code</li> <li>Sales Credit Allocation</li> <li>Sales Credit Type</li> <li>Split Type Code</li> <li>Status</li> <li>UOM</li> <li>Win / Loss Reason</li> </ul> |

| Business Object  | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Fields Enabled for the Search Box                                                                                                                                                                                                                                  |
|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  | <ul style="list-style-type: none"> <li>Record Set</li> <li>Recurrence Type Code</li> <li>Sales Credit</li> <li>Sales Credit Allocation</li> <li>Sales Credit Type</li> <li>Split Type Code</li> <li>Status</li> <li>UOM</li> <li>Win Probability</li> <li>Win / Loss Reason</li> <li>Worse Case</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                                                    |
| Service Requests | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Asset (Asset Number, Serial Number)</li> <li>Assigned To (Name, Primary Email, Primary Phone)</li> <li>Category Name</li> <li>Channel Type</li> <li>Contacts (Name, Primary Address, Primary Email, Primary Phone, Registry ID)</li> <li>Created By</li> <li>Creation Date</li> <li>Critical</li> <li>Date Closed</li> <li>Date Reported</li> <li>Language Code</li> <li>Last Updated By</li> <li>Last Updated Date</li> <li>Messages (Channel Type, Message Content)</li> <li>Outcome</li> <li>Owner Type</li> <li>Primary Contact (Name, Primary Address, Primary Email, Primary Phone, Registry ID)</li> <li>Problem Description</li> <li>Product (Name)</li> <li>Product Group (Name)</li> <li>Queue (Queue Name)</li> <li>Record Set</li> <li>Reference Number</li> </ul> | <ul style="list-style-type: none"> <li>Account (Name, Primary Address)</li> <li>Consumer (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Primary Contact (Name, Primary Address, Primary Email, Primary Phone)</li> <li>Reference Number</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                            | Fields Enabled for the Search Box |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
|                 | <ul style="list-style-type: none"> <li>• Reported By (Name, Primary Email, Primary Phone)</li> <li>• Resolution Code</li> <li>• Resolution Date</li> <li>• Resolved By</li> <li>• Severity</li> <li>• Solution Description</li> <li>• Status</li> <li>• Stripe Code</li> <li>• Team Members (Name, Primary Email, Primary Phone)</li> <li>• Title</li> </ul> |                                   |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Territory       | <ul style="list-style-type: none"> <li>Coverage <ul style="list-style-type: none"> <li>Account Name</li> <li>Account Type</li> <li>Additional Attribute 1</li> <li>Additional Attribute 2</li> <li>Additional Attribute 3</li> <li>Additional Attribute 4</li> <li>Additional Attribute 5</li> <li>Aux1</li> <li>Aux2</li> <li>Aux3</li> <li>Business Unit</li> <li>Coverage Type</li> <li>Coverage Model</li> <li>Customer Size</li> <li>City</li> <li>County</li> <li>Country</li> <li>Geography</li> <li>Geography High ID</li> <li>Include Hierarchy</li> <li>Item</li> <li>Inventory Organization</li> <li>Industry</li> <li>Partner</li> <li>Province</li> <li>Postal Code</li> <li>Product Group</li> <li>Sales Channel</li> <li>Sales Subchannel</li> <li>State</li> </ul> </li> <li>Coverage Model</li> <li>Created By</li> <li>Creation Date</li> <li>Description</li> <li>Eligible for Quota</li> </ul> | <ul style="list-style-type: none"> <li>Coverage <ul style="list-style-type: none"> <li>Account Name</li> <li>Account Type</li> <li>Additional Attribute 1</li> <li>Additional Attribute 2</li> <li>Additional Attribute 3</li> <li>Additional Attribute 4</li> <li>Additional Attribute 5</li> <li>Aux1</li> <li>Aux2</li> <li>Aux3</li> <li>Business Unit</li> <li>Coverage Type</li> <li>Coverage Model</li> <li>Customer Size</li> <li>City</li> <li>County</li> <li>Country</li> <li>Geography</li> <li>Geography High ID</li> <li>Include Hierarchy</li> <li>Item</li> <li>Inventory Organization</li> <li>Industry</li> <li>Partner</li> <li>Province</li> <li>Postal Code</li> <li>Product Group</li> <li>Sales Channel</li> <li>Sales Subchannel</li> <li>State</li> </ul> </li> <li>Description</li> <li>Function</li> <li>Name</li> <li>Owner</li> <li>Parent Territory</li> </ul> |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Fields Enabled for the Search Box                                                                                                                                                                                                                                                                                               |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"> <li>• Forecast Participation Code</li> <li>• Function</li> <li>• Last Updated By</li> <li>• Last Updated Date</li> <li>• Leaf Territory</li> <li>• Line of Business</li> <li>• Name</li> <li>• Owner</li> <li>• Parent Territory</li> <li>• Parent Territory Number</li> <li>• Parent Territory Unique Number</li> <li>• Partner (Name, Partner Number, Primary Address, Public Address ID, Public Email ID, Public Fax ID, Public Phone ID)</li> <li>• Partner ID</li> <li>• Resource</li> <li>○ Forecasting Delegate</li> <li>○ Team Member Function</li> <li>• Source Territory</li> <li>• Team Members (Name, Primary Email, Primary Phone)</li> <li>• Territory ID</li> <li>• Territory Number</li> <li>• Type</li> <li>• Unique Territory Number</li> </ul> | <ul style="list-style-type: none"> <li>• Parent Territory Number</li> <li>• Parent Territory Unique Number</li> <li>• Partner ID</li> <li>• Resource</li> <li>○ Forecasting Delegate</li> <li>○ Team Member Function</li> <li>• Source Territory</li> <li>• Territory ID</li> <li>• Territory Number</li> <li>• Type</li> </ul> |
| Work Order      | <ul style="list-style-type: none"> <li>• Assignee Party Name (Name, Primary Email, Primary Phone)</li> <li>• Case Category ID</li> <li>• Case Message</li> <li>• Case Number</li> <li>• Case Opportunity (Name)</li> <li>• Case Resource (Name, Primary Email, Primary Phone)</li> <li>• Closed Date</li> <li>• Contacts (Name, Primary Address, Primary Email, Primary Phone)</li> <li>• Created By</li> <li>• Creation Date</li> <li>• Description</li> <li>• Favorite</li> </ul>                                                                                                                                                                                                                                                                                                                  | <ul style="list-style-type: none"> <li>• Case Number</li> </ul>                                                                                                                                                                                                                                                                 |

| Business Object | Fields Enabled for Use as Filters                                                                                                                                                                                                               | Fields Enabled for the Search Box |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
|                 | <ul style="list-style-type: none"><li>Last Updated By</li><li>Last Updated Date</li><li>Open Date</li><li>Primary Contact Party ID</li><li>Queue ID</li><li>Reported by Party Name (Name, Primary Email, Primary Phone)</li><li>Title</li></ul> |                                   |

## What is the security access difference for contacts created by Customer, Prospect, and Standalone types?

This topic lists the standalone data security predicates predefined for each of the business objects supported by Adaptive Search. Data security predicates provide access to object data, the access type, and the data to be accessed.

The data to be accessed can be All, a specific record, or a subset of the data.

**Note:** Adaptive Search doesn't support the use of custom data security policies. Customers must use Access Groups instead as described in the Securing CX Sales and Fusion Service guide.

The instance set defines the subset of data that limits the condition part of the data resource. For more information, see the Manage Database Resources section of the Securing CX Sales and Fusion Service guide.

### ACCOUNT

This table lists the instance set name and associated description for the Account business object:

| Instance Set Name  | Instance Set Description                                                                                                                                                   | Required Action Set                                                           |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| HZPARTIESHZ197     | Access the trading community organization for table HZ_PARTIES for a trading community organization that's a partner and the user is a member of the partner organization. | <ul style="list-style-type: none"><li>View Sales Party</li><li>Read</li></ul> |
| HZPARTIESZBS100105 | Access the sales party for table HZ_PARTIES where they're in the management chain of the account owner.                                                                    | <ul style="list-style-type: none"><li>View Sales Party</li><li>Read</li></ul> |
| HZPARTIESZBS100106 | Access the sales party for table HZ_PARTIES where they're the account owner.                                                                                               | <ul style="list-style-type: none"><li>View Sales Party</li><li>Read</li></ul> |
| HZPARTIESZCM1      | Access the sales party for table HZ_PARTIES where user is in the sales account team.                                                                                       | <ul style="list-style-type: none"><li>View Sales Party</li><li>Read</li></ul> |



| Instance Set Name | Instance Set Description                                                                                                                                    | Required Action Set                                                              |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| HZPARTIESZCM8     | Access the sales party for table HZ_PARTIES for all sales parties in the enterprise.                                                                        | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM133   | Access the sales party for table HZ_PARTIES for all prospects in the enterprise.                                                                            | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM134   | Access the sales party for table HZ_PARTIES for all customers in the enterprise.                                                                            | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM3     | Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team.                            | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM39    | Access the sales party for table HZ_PARTIES where user is a member of the territory associated with the sales account.                                      | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM4     | Access the sales party for table HZ_PARTIES where user is in the sales account team with edit access.                                                       | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM40    | Access the sales party for table HZ_PARTIES where user is a member of the territory that's an ancestor of the territory associated with the sales account.  | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM44    | Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team with edit access.           | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM45    | Access the sales party for table HZ_PARTIES where user is in the sales account team with full access.                                                       | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM46    | Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team with full access.           | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM51    | Access the sales party for table HZ_PARTIES where user is the owner of the territory associated with the sales account.                                     | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM52    | Access the sales party for table HZ_PARTIES where user is the owner of the territory that's an ancestor of the territory associated with the sales account. | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |

| Instance Set Name | Instance Set Description                            | Required Action Set                                                               |
|-------------------|-----------------------------------------------------|-----------------------------------------------------------------------------------|
| HZPARTIESZCA99968 | Access the accounts where they're in access groups. | <ul style="list-style-type: none"><li>• View Sales Party</li><li>• Read</li></ul> |

## ACTIVITY

This table lists the instance set name and associated description for the Activity business object:

| Instance Set Name        | Instance Set Description                                                                                                                                           | Required Action Set                                                            |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------|
| ZMMACTYACTIVITIESZMM1398 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're only an owner of an activity (1=1).                                                                | <ul style="list-style-type: none"><li>• View Activity</li><li>• Read</li></ul> |
| ZMMACTYACTIVITIESZMM1399 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're only a delegator of an activity (1=1).                                                             | <ul style="list-style-type: none"><li>• View Activity</li><li>• Read</li></ul> |
| ZMMACTYACTIVITIESZMM1400 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of an owner only of an activity.                                           | <ul style="list-style-type: none"><li>• View Activity</li><li>• Read</li></ul> |
| ZMMACTYACTIVITIESZMM1401 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of a delegator only of an activity.                                        | <ul style="list-style-type: none"><li>• View Activity</li><li>• Read</li></ul> |
| ZMMACTYACTIVITIESZMM1402 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're only a resource of an activity.                                                                    | <ul style="list-style-type: none"><li>• View Activity</li><li>• Read</li></ul> |
| ZMMACTYACTIVITIESZMM1403 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of a resource only of an activity.                                         | <ul style="list-style-type: none"><li>• View Activity</li><li>• Read</li></ul> |
| ZMMACTYACTIVITIESZMM1404 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're the owner of an account associated with an activity.                                               | <ul style="list-style-type: none"><li>• View Activity</li><li>• Read</li></ul> |
| ZMMACTYACTIVITIESZMM1405 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the sales account team and the sales account activity that's in their management hierarchy.     | <ul style="list-style-type: none"><li>• View Activity</li><li>• Read</li></ul> |
| ZMMACTYACTIVITIESZMM1406 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the sales account territory and the sales account activity that's in their territory hierarchy. | <ul style="list-style-type: none"><li>• View Activity</li><li>• Read</li></ul> |
| ZMMACTYACTIVITIESZMM1408 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the opportunity                                                                                 | <ul style="list-style-type: none"><li>• View Activity</li></ul>                |

| Instance Set Name        | Instance Set Description                                                                                                                                                                                      | Required Action Set                                                           |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
|                          | team and the opportunity activity that's in their management hierarchy.                                                                                                                                       | <ul style="list-style-type: none"> <li>Read</li> </ul>                        |
| ZMMACTYACTIVITIESZMM1409 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the opportunity territory and the opportunity activity that's in their territory hierarchy.                                                | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM1410 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the lead team and the lead activity that's in their management hierarchy.                                                                  | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM1411 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're on the lead territory and the lead activity that's in their territory hierarchy.                                                              | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM47   | Access the activity for table ZMM_ACTY_ACTIVITIES for all template activities in the enterprise.                                                                                                              | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM48   | Access the activity for table ZMM_ACTY_ACTIVITIES where they're either a resource or a delegator of an activity.                                                                                              | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM49   | Access the activity for table ZMM_ACTY_ACTIVITIES where they're either a resource or a delegator of a task or an owner or a delegator of an appointment or an owner or a delegator of a call report activity. | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM50   | Access the activity for table ZMM_ACTY_ACTIVITIES where they're either the owner or a delegator of an activity.                                                                                               | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM51   | Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of an activity resource.                                                                                              | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM52   | Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain for a task activity or they're an owner for an appointment activity.                                                  | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM53   | Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of the activity owner.                                                                                                | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM54   | Access the activity for table ZMM_ACTY_ACTIVITIES for all activities in the enterprise.                                                                                                                       | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |

| Instance Set Name        | Instance Set Description                                                                                                                                                           | Required Action Set                                                           |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| ZMMACTYACTIVITIESZMM74   | Access the activity for table ZMM_ACTY_ACTIVITIES where they're a participant on the activity.                                                                                     | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM75   | Access the activity for table ZMM_ACTY_ACTIVITIES where they're either a resource or a delegator of a task or an owner or a delegator of an appointment or a call report activity. | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM76   | Access the activity for table ZMM_ACTY_ACTIVITIES where partner users are resources in the activity.                                                                               | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM77   | Access the activity for table ZMM_ACTY_ACTIVITIES can edit all activities where users from their partner company are participating.                                                | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM1413 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're in the management chain of a resource for the primary contact of an activity.                                      | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |
| ZMMACTYACTIVITIESZMM1414 | Access the activity for table ZMM_ACTY_ACTIVITIES where they're member of a partner territory.                                                                                     | <ul style="list-style-type: none"> <li>View Activity</li> <li>Read</li> </ul> |

## ASSET

This table lists the instance set name and associated description for the Asset business object:

| Instance Set Name | Instance Set Description                                                                                                                                | Required Action Set                                                        |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------|
| ZCAASSETZCM213    | Access the Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party.                                                  | <ul style="list-style-type: none"> <li>View Asset</li> <li>Read</li> </ul> |
| ZCAASSETZCM214    | Access the Asset for table ZCA_ASSET where user is in the management chain of a resource who's a sales party team member of the asset owner party.      | <ul style="list-style-type: none"> <li>View Asset</li> <li>Read</li> </ul> |
| ZCAASSETZCM215    | Access the Asset for table ZCA_ASSET where user is a member of the territory associated with the asset owner party.                                     | <ul style="list-style-type: none"> <li>View Asset</li> <li>Read</li> </ul> |
| ZCAASSETZCM216    | Access the Asset for table ZCA_ASSET where user is a member of the territory that's an ancestor of the territory associated with the asset owner party. | <ul style="list-style-type: none"> <li>View Asset</li> <li>Read</li> </ul> |

| Instance Set Name | Instance Set Description                                                                                                                                            | Required Action Set                                                         |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------|
| ZCAASSETZCM224    | Access the Asset for table ZCA_ASSET where user is in the management chain of a resource who's a sales party team member of the asset owner party with edit access. | <ul style="list-style-type: none"><li>• View Asset</li><li>• Read</li></ul> |
| ZCAASSETZCM228    | Access the Asset for table ZCA_ASSET where user is in the management chain of a resource who's a sales party team member of the asset owner party with full access. | <ul style="list-style-type: none"><li>• View Asset</li><li>• Read</li></ul> |
| ZCAASSETZCM252    | Access the Asset for table ZCA_ASSET where user is owner of the territory associated with the asset owner party.                                                    | <ul style="list-style-type: none"><li>• View Asset</li><li>• Read</li></ul> |
| ZCAASSETZCM253    | Access the Asset for table ZCA_ASSET where user is a owner of the territory that's an ancestor of the territory associated with the asset owner party.              | <ul style="list-style-type: none"><li>• View Asset</li><li>• Read</li></ul> |
| ZCAASSETZCM254    | Access the Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party with edit access.                                             | <ul style="list-style-type: none"><li>• View Asset</li><li>• Read</li></ul> |
| ZCAASSETZCM255    | Access the Asset for table ZCA_ASSET where user is a sales party team member of the asset owner party with full access.                                             | <ul style="list-style-type: none"><li>• View Asset</li><li>• Read</li></ul> |
| ZCAASSETZCM266    | Access the Asset for table ZCA_ASSET all assets in the enterprise where asset owner party is a prospect.                                                            | <ul style="list-style-type: none"><li>• View Asset</li><li>• Read</li></ul> |
| ZCAASSETZCM268    | Access the Asset for table ZCA_ASSET all assets in the enterprise where asset owner party is a customer.                                                            | <ul style="list-style-type: none"><li>• View Asset</li><li>• Read</li></ul> |

## CAMPAIGN

This table lists the instance set name and associated description for the Campaign business object:

| Instance Set Name     | Instance Set Description                                                                                                                | Required Instance Name                                                                               |
|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|
| MKTCAMPAIGNSZCA100054 | Access groups can view marketing integration campaigns as a member of an access group associated to the marketing integration campaign. | <ul style="list-style-type: none"><li>• View Marketing Integration Campaign</li><li>• Read</li></ul> |

## CASE

This table lists the instance set name and associated description for the Case business object:

| Instance Set Name     | Instance Set Description                                                                      | Required Instance Name                                                            |
|-----------------------|-----------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| SVCCASESSVC330        | Access the cases for table SVC_CASES where the case is assigned to them or their subordinate. | <ul style="list-style-type: none"><li>• View Case Header</li><li>• Read</li></ul> |
| SVCCASEMESSAGESSVC322 | Access the case messages for table SVC_CASE_MESSAGES where they're the creator of a message.  | <ul style="list-style-type: none"><li>• View Case Header</li><li>• Read</li></ul> |

## COMPETITOR

This table lists the instance set name and associated description for the Competitor business object:

| Instance Set Name  | Instance Set Description                                                                                                | Required Instance Name                                                            |
|--------------------|-------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| HZPARTIESZCA100184 | Access the trading community party for table HZ_PARTIES a member of an access group associated to the sales competitor. | <ul style="list-style-type: none"><li>• View Sales Party</li><li>• Read</li></ul> |

## CONTACT

This table lists the instance set name and associated description for the Contact business object:

| Instance Set Name  | Instance Set Description                                                                                                                                                             | Required Instance Name                                                            |
|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------|
| HZPARTIESHZ196     | Access the trading community person for table HZ_PARTIES for all people in the enterprise (1=1). Ensure that View Sales Party action is enabled.                                     | <ul style="list-style-type: none"><li>• View Sales Party</li><li>• Read</li></ul> |
| HZPARTIESHZ198     | Access the trading community person for table HZ_PARTIES for their trading community person record.                                                                                  | <ul style="list-style-type: none"><li>• View Sales Party</li><li>• Read</li></ul> |
| HZPARTIESHZ199     | Access the trading community person for table HZ_PARTIES for all persons who are a member of their partner organization.                                                             | <ul style="list-style-type: none"><li>• View Sales Party</li><li>• Read</li></ul> |
| HZPARTIESZBS100105 | Access the sales party for table HZ_PARTIES where they're in the management chain of the account owner.                                                                              | <ul style="list-style-type: none"><li>• View Sales Party</li><li>• Read</li></ul> |
| HZPARTIESZBS100106 | Access the sales party for table HZ_PARTIES where they're the account owner.                                                                                                         | <ul style="list-style-type: none"><li>• View Sales Party</li><li>• Read</li></ul> |
| HZPARTIESZBS100108 | Access the sales party for table HZ_PARTIES for all customer contacts where they're in the management chain of a resource who's on the account team of at least one related account. | <ul style="list-style-type: none"><li>• View Sales Party</li><li>• Read</li></ul> |

| Instance Set Name  | Instance Set Description                                                                                                                                                                              | Required Instance Name                                                               |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
|                    |                                                                                                                                                                                                       |                                                                                      |
| HZPARTIESZBS100116 | Access the sales party for table HZ_PARTIES for all customer contacts where they're a member of a territory associated with at least one related account.                                             | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |
| HZPARTIESZBS100118 | Access the sales party for table HZ_PARTIES for all customer contacts where they're a member of an ancestor territory to a territory associated with at least one related account.                    | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |
| HZPARTIESZBS100119 | Access the sales party for table HZ_PARTIES for all customer contacts where they're in the management chain of a resource who's on the account team of at least one related account with full access. | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |
| HZPARTIESZBS100120 | Access the sales party for table HZ_PARTIES for all customer contacts where they're in the management chain of a resource who's on the account team of at least one related account with edit access. | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |
| HZPARTIESZCM1      | Access the sales party for table HZ_PARTIES where user is in the sales account team.                                                                                                                  | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |
| HZPARTIESZCM133    | Access the sales party for table HZ_PARTIES for all prospects in the enterprise.                                                                                                                      | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |
| HZPARTIESZCM134    | Access the sales party for table HZ_PARTIES for all customers in the enterprise.                                                                                                                      | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |
| HZPARTIESZCM169    | Access the sales party for table HZ_PARTIES for all customer contacts where they're in the account team of at least one related account with edit access.                                             | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |
| HZPARTIESZCM170    | Access the sales party for table HZ_PARTIES for all customer contacts where they're in the account team of at least one related account with full access.                                             | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |
| HZPARTIESZCM173    | Access the sales party for table HZ_PARTIES for all customer contacts where they're in the account team of at least one related account.                                                              | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |
| HZPARTIESZCM3      | Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team.                                                                      | <ul style="list-style-type: none"> <li>• View Sales Party</li> <li>• Read</li> </ul> |

| Instance Set Name | Instance Set Description                                                                                                                                    | Required Instance Name                                                           |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| HZPARTIESZCM39    | Access the sales party for table HZ_PARTIES where user is a member of the territory associated with the sales account.                                      | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM4     | Access the sales party for table HZ_PARTIES where user is in the sales account team with edit access.                                                       | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM40    | Access the sales party for table HZ_PARTIES where user is a member of the territory that's an ancestor of the territory associated with the sales account.  | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM44    | Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team with edit access.           | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM45    | Access the sales party for table HZ_PARTIES where user is in the sales account team with full access.                                                       | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM46    | Access the sales party for table HZ_PARTIES where user is in the management chain of a resource who's on the sales account team with full access.           | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM51    | Access the sales party for table HZ_PARTIES where user is the owner of the territory associated with the sales account.                                     | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM52    | Access the sales party for table HZ_PARTIES where user is the owner of the territory that's an ancestor of the territory associated with the sales account. | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM158   | Access the Contacts with one party usage.                                                                                                                   | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCM415   | Access the Contacts which aren't created by Partner User.                                                                                                   | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |
| HZPARTIESZCA99972 | Access the Contacts where they're in access groups.                                                                                                         | <ul style="list-style-type: none"> <li>View Sales Party</li> <li>Read</li> </ul> |

## CUSTOM

This table lists the instance set name and associated description for the Custom object business object:



| Instance Set Name          | Instance Set Description                                                                         | Required Instance Set |
|----------------------------|--------------------------------------------------------------------------------------------------|-----------------------|
| ZCX_OWNER_[OBJECT_NAME]    | Access the Custom Object where the user is Owner of the Custom Object.                           | Read                  |
| ZCX_MGR_HIER_[OBJECT_NAME] | Access the Custom Object where the user is in management chain of the Owner of the Custom Object | Read                  |

## DEAL REGISTRATION

This table lists the instance set name and associated description for the Deal Registration business object:

| Instance Set Name   | Instance Set Description                                                                                                              | Required Instance Set                                                               |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
| MKLDMDEALSMKL1500   | Access the deal registration summary for table MKL_DM_DEALS for all deal registrations in the enterprise.                             | <ul style="list-style-type: none"><li>View Deal Registration</li><li>Read</li></ul> |
| MKLDMDEALSMKL4021   | Access the deal registration summary for table MKL_DM_DEALS where they're a resource on the deal team with view, edit or full access. | <ul style="list-style-type: none"><li>View Deal Registration</li><li>Read</li></ul> |
| MKLDMDEALSMKL5049   | Access the deal registration summary for table MKL_DM_DEALS where they're in the partner organization.                                | <ul style="list-style-type: none"><li>View Deal Registration</li><li>Read</li></ul> |
| MKLDMDEALSZCA100002 | Access the deal registration summary for table MKL_DM_DEALS a member of an access group associated with the deal registration.        | <ul style="list-style-type: none"><li>View Deal Registration</li><li>Read</li></ul> |

## HR HELP DESK REQUEST

This table lists the instance set name and associated description for the HR Help Desk Request business object:

| Instance Set Name        | Instance Set Description                                                                                                        | Required Instance Set |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| SVCSERVICEREQUESTSSVC460 | Access the service request header for table SVC_SERVICE_REQUESTS for all HRHD service requests(1=1).                            | Read                  |
| SVCSERVICEREQUESTSSVC489 | Access the service request header for table SVC_SERVICE_REQUESTS where they're the primary contact of the HRHD service request. | Read                  |
| SVCSERVICEREQUESTSSVC514 | Access the service request header for table SVC_SERVICE_REQUESTS where the HRHD service request is assigned to them.            | Read                  |

| Instance Set Name        | Instance Set Description                                                                                                                                           | Required Instance Set |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| SVCSERVICEREQUESTSSVC486 | Access the service request header for table SVC_SERVICE_REQUESTS where they created the HRHD service request.                                                      | Read                  |
| SVCSERVICEREQUESTSSVC515 | Access the service request header for table SVC_SERVICE_REQUESTS where they're a member of HRHD service request team.                                              | Read                  |
| SVCSERVICEREQUESTSSVC519 | Access the service request header for table SVC_SERVICE_REQUESTS where the HRHD service request is assigned to them or their subordinate.                          | Read                  |
| SVCSERVICEREQUESTSSVC520 | Access the service request header for table SVC_SERVICE_REQUESTS where they or their subordinate is a member of HRHD service request team.                         | Read                  |
| SVCSERVICEREQUESTSSVC516 | Access the service request header for table SVC_SERVICE_REQUESTS where the HRHD service request is assigned to a queue that they're a member.                      | Read                  |
| SVCSERVICEREQUESTSSVC476 | Access the service request header for table SVC_SERVICE_REQUESTS where the HRHD service request is assigned to a queue that they or their subordinate is a member. | Read                  |

## INSTALLED BASED ASSET

This table lists the instance set name and associated description for the Installed Based Asset business object:

| Instance Set Name | Instance Set Description                                                                                                                                                | Required Instance Set                                                                       |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| CSEASSETSBSVC605  | Access the installed base asset for table CSE_ASSETS_B for all enterprise assets.                                                                                       | <ul style="list-style-type: none"> <li>Manage Installed Base Asset</li> <li>Read</li> </ul> |
| CSEASSETSBSVC437  | Access the installed base asset for table CSE_ASSETS_B for all installed base assets where they're listed as the contact on the asset account team that owns the asset. | <ul style="list-style-type: none"> <li>Manage Installed Base Asset</li> <li>Read</li> </ul> |
| CSEASSETSBSVC438  | Access the installed base asset for table CSE_ASSETS_B for all installed base assets where they're listed as the primary contact on the asset.                          | <ul style="list-style-type: none"> <li>Manage Installed Base Asset</li> <li>Read</li> </ul> |
| CSEASSETSBSVC439  | Access the installed base asset for table CSE_ASSETS_B for all installed base assets where                                                                              | <ul style="list-style-type: none"> <li>Manage Installed Base Asset</li> <li>Read</li> </ul> |

| Instance Set Name | Instance Set Description                                                        | Required Instance Set                                                                    |
|-------------------|---------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
|                   | they're a manager for the account listed on the asset.                          |                                                                                          |
| CSEASSETSBSVC434  | Access the installed base asset for table CSE_ASSETS_B for all customer assets. | <ul style="list-style-type: none"><li>Manage Installed Base Asset</li><li>Read</li></ul> |

## INTERNAL SERVICE REQUEST

This table lists the instance set name and associated description for the Internal Service Request business object:

| Instance Set Name        | Instance Set Description                                                                                                                                    | Required Instance Set |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| SVCSERVICEREQUESTSSVC273 | Access the service request header for table SVC_SERVICE_REQUESTS for all internal help desk service requests (1=1).                                         | Read                  |
| SVCSERVICEREQUESTSSVC289 | Access the service request header for table SVC_SERVICE_REQUESTS where the internal help desk service request is assigned to them or their subordinate.     | Read                  |
| SVCSERVICEREQUESTSSVC290 | Access the service request header for table SVC_SERVICE_REQUESTS where they're the primary contact of the internal help desk service request.               | Read                  |
| SVCSERVICEREQUESTSSVC311 | Access the service request header for table SVC_SERVICE_REQUESTS where the internal help desk service request is assigned to them.                          | Read                  |
| SVCSERVICEREQUESTSSVC291 | Access the service request header for table SVC_SERVICE_REQUESTS where they created the internal help desk service request.                                 | Read                  |
| SVCSERVICEREQUESTSSVC312 | Access the service request header for table SVC_SERVICE_REQUESTS where they're a member of internal help desk service request team.                         | Read                  |
| SVCSERVICEREQUESTSSVC292 | Access the service request header for table SVC_SERVICE_REQUESTS where they or their subordinate is a member of internal help desk service request team.    | Read                  |
| SVCSERVICEREQUESTSSVC310 | Access the service request header for table SVC_SERVICE_REQUESTS where the internal help desk service request is assigned to a queue that they're a member. | Read                  |

| Instance Set Name       | Instance Set Description                                                                                                                                                                                 | Required Instance Set |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| SVCSEVICEREQUESTSSVC288 | Access the service request header for table SVC_SERVICE_REQUESTS where the internal help desk service request is assigned to a queue that they or their subordinate is a member of HRHD Service Request. | Read                  |

## LEAD

This table lists the instance set name and associated description for the Lead business object:

| Instance Set Name | Instance Set Description                                                                                                                                                                               | Required Set Instance                                                        |
|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------|
| MKLLMLEADSMKL1    | Access the sales lead for table MKL_LM_LEADS where they're a resource in the lead sales team.                                                                                                          | <ul style="list-style-type: none"><li>View Sales Lead</li><li>Read</li></ul> |
| MKLLMLEADSMKL10   | Access the sales lead for table MKL_LM_LEADS where they're a resource in the territory assigned to the sales lead.                                                                                     | <ul style="list-style-type: none"><li>View Sales Lead</li><li>Read</li></ul> |
| MKLLMLEADSMKL104  | Access the sales lead for table MKL_LM_LEADS where they're the owner of the sales lead.                                                                                                                | <ul style="list-style-type: none"><li>View Sales Lead</li><li>Read</li></ul> |
| MKLLMLEADSMKL114  | Access the sales lead for table MKL_LM_LEADS where they're a resource in the lead sales team with full access.                                                                                         | <ul style="list-style-type: none"><li>View Sales Lead</li><li>Read</li></ul> |
| MKLLMLEADSMKL129  | Access the sales lead for table MKL_LM_LEADS where they're a territory resource in the sales lead territory team or a territory resource with a descendant territory in the sales lead territory team. | <ul style="list-style-type: none"><li>View Sales Lead</li><li>Read</li></ul> |
| MKLLMLEADSMKL138  | Access the sales lead for table MKL_LM_LEADS for all retired leads in the enterprise.                                                                                                                  | <ul style="list-style-type: none"><li>View Sales Lead</li><li>Read</li></ul> |
| MKLLMLEADSMKL148  | Access the sales lead for table MKL_LM_LEADS for all partner leads in the enterprise.                                                                                                                  | <ul style="list-style-type: none"><li>View Sales Lead</li><li>Read</li></ul> |
| MKLLMLEADSMKL15   | Access the sales lead for table MKL_LM_LEADS where they're a manager in the management hierarchy of a resource in the lead sales team with full access.                                                | <ul style="list-style-type: none"><li>View Sales Lead</li><li>Read</li></ul> |
| MKLLMLEADSMKL152  | Access the sales lead for table MKL_LM_LEADS for all sales leads in the business units that they're authorized.                                                                                        | <ul style="list-style-type: none"><li>View Sales Lead</li><li>Read</li></ul> |

| Instance Set Name  | Instance Set Description                                                                                                                                             | Required Set Instance                                                           |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| MKLLMLEADSMKL16    | Access the sales lead for table MKL_LM_LEADS where they're a manager in the management hierarchy of the owner of the sales lead.                                     | <ul style="list-style-type: none"> <li>View Sales Lead</li> <li>Read</li> </ul> |
| MKLLMLEADSMKL22    | Access the sales lead for table MKL_LM_LEADS where they're a manager in the management hierarchy of a resource in the lead sales team.                               | <ul style="list-style-type: none"> <li>View Sales Lead</li> <li>Read</li> </ul> |
| MKLLMLEADSMKL310   | Access the sales lead for table MKL_LM_LEADS where they're in the management hierarchy of the owner of the lead.                                                     | <ul style="list-style-type: none"> <li>View Sales Lead</li> <li>Read</li> </ul> |
| MKLLMLEADSZBS902   | Access the sales lead for table MKL_LM_LEADS where they're member or in management chain of lead sales team, member of territory team or upward territory hierarchy. | <ul style="list-style-type: none"> <li>View Sales Lead</li> <li>Read</li> </ul> |
| MKLLMLEADSZCA99964 | User can view lead for their access groups.                                                                                                                          | <ul style="list-style-type: none"> <li>View Sales Lead</li> <li>Read</li> </ul> |

## OPPORTUNITY

This table lists the instance set name and associated description for the Opportunity business object:

| Instance Set Name | Instance Set Description                                                                                                  | Required Instance Set                                                            |
|-------------------|---------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| MOOOPTYMOO119     | Access the opportunity for table MOO_OPTY for the selected records where I am on the team on the sales UI.                | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOOOPTYMOO120     | Access the opportunity for table MOO_OPTY for the selected records I own on the sales UI.                                 | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOOOPTYMOO121     | Access the opportunity for table MOO_OPTY for the selected records my subordinates own on the sales UI.                   | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOOOPTYMOO122     | Access the opportunity for table MOO_OPTY for the selected records where my subordinates are on the team on the sales UI. | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOOOPTYMOO123     | Access the opportunity for table MOO_OPTY for the selected records in my territory on the sales UI.                       | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOOOPTYMOO124     | Access the opportunity for table MOO_OPTY for the selected records in my territory hierarchy on the sales UI.             | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |

| Instance Set Name           | Instance Set Description                                                                                                                                                                                                          | Required Instance Set                                                            |
|-----------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| MOOOPTYMOO88                | Access the opportunity for table MOO_OPTY for all opportunities in the enterprise (1=1).                                                                                                                                          | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOOOPTYZBS99903             | Access the opportunity for table MOO_OPTY where they're a member or in a management chain of opportunity sales team with view, edit or full access, member of territory team or upward territory hierarchy.                       | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOOOPTYZBS99904             | Access the opportunity for table MOO_OPTY where they're a member or in management chain of opportunity account team, account territory team or upward territory hierarchy.                                                        | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOO_OPTYACCTERR_HIER_RES    | Access the opportunity for table MOO_OPTY where they're a territory resource in the opportunity sales account territory team or a territory resource with a descendant territory in the opportunity sales account territory team. | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOO_OPTY_ADMIN_SALES_ADMIN  | Access the opportunity for table MOO_OPTY for all opportunities in the business units that they're authorized within.                                                                                                             | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOO_OPTY_EDIT_OPTYTEAM_MGR  | Access the opportunity for table MOO_OPTY where they're in the management chain of an opportunity sales team member with edit or full access.                                                                                     | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOO_OPTY_EDIT_OPTYTEAM_REPS | Access the opportunity for table MOO_OPTY where they're an opportunity sales team member with edit or full access.                                                                                                                | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOO_OPTY_FULL_OPTYTEAM_MGR  | Access the opportunity for table MOO_OPTY where they're in the management chain of an opportunity sales team member with full access.                                                                                             | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOO_OPTY_FULL_OPTYTEAM_REPS | Access the opportunity for table MOO_OPTY where they're an opportunity sales team member with full access.                                                                                                                        | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOO_OPTY_TERR_HIER_RES      | Access the opportunity for table MOO_OPTY where they're a territory resource in the opportunity territory team or a territory resource with a descendant territory in the opportunity territory team.                             | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |
| MOO_OPTY_VIEW_ACCTTEAM_MGR  | Access the opportunity for table MOO_OPTY where they're in the management chain of an opportunity sales account team member.                                                                                                      | <ul style="list-style-type: none"> <li>View Opportunity</li> <li>Read</li> </ul> |

| Instance Set Name           | Instance Set Description                                                                                                                             | Required Instance Set                                                         |
|-----------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| MOO_OPTY_VIEW_ACCTTEAM_REPS | Access the opportunity for table MOO_OPTY where they're a member of the opportunity sales account team.                                              | <ul style="list-style-type: none"><li>View Opportunity</li><li>Read</li></ul> |
| MOO_OPTY_VIEW_OPTYTEAM_MGR  | Access the opportunity for table MOO_OPTY where they're in the management chain of an opportunity sales team member with view, edit, or full access. | <ul style="list-style-type: none"><li>View Opportunity</li><li>Read</li></ul> |
| MOO_OPTY_VIEW_OPTYTEAM_REPS | Access the opportunity for table MOO_OPTY where they're an opportunity sales team member with view, edit, or full access.                            | <ul style="list-style-type: none"><li>View Opportunity</li><li>Read</li></ul> |
| MOOOPTYZCA99962             | User can view Opportunities where they're in access groups.                                                                                          | <ul style="list-style-type: none"><li>View Opportunity</li><li>Read</li></ul> |

## PARTNER

This table lists the instance set name and associated description for the Partner business object:

| Instance Set Name | Instance Set Description                                                                                                      | Required Action Set |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------|---------------------|
| HZPARTIESHZ521    | Access the Partner where the user is the owner of the Partner Account.                                                        | Read                |
| HZPARTIESHZ522    | Access the Partner where the user is in management chain of the owner of the Partner Account.                                 | Read                |
| HZPARTIESHZ523    | Access the Partner where the user is a member of the Partner Account team.                                                    | Read                |
| HZPARTIESHZ524    | Access the Partner where the user is in management chain of the member of the Partner Account team.                           | Read                |
| HZPARTIESHZ525    | Access the Partner where the user is an owner or member of the Territory assigned to the Partner Account.                     | Read                |
| HZPARTIESHZ526    | Access the Partner where the user is a member of the territory and a descendant territory is assigned to the Partner Account. | Read                |
| HZPARTIESHZ197    | Access the Partner where user is a member of partner organization.                                                            | Read                |

| Instance Set Name | Instance Set Description                              | Required Action Set |
|-------------------|-------------------------------------------------------|---------------------|
| HZPARTIESZCA99978 | User can view Partner where they're in access groups. | Read                |

## PARTNER CONTACT

This table lists the instance set name and associated description for the Partner Contact business object:

| Instance Set Name | Instance Set Description                                                                                                              | Required Instance Set |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| HZPARTIESHZ530    | Access the Partner Contact where the user is a member of the Partner Account team.                                                    | Read                  |
| HZPARTIESHZ531    | Access the Partner Contact where the user is in management chain of the member of the Partner Account team.                           | Read                  |
| HZPARTIESHZ532    | Access the Partner Contact where the user is Owner of the Partner Account.                                                            | Read                  |
| HZPARTIESHZ533    | Access the Partner Contact where the user is in management chain of the Owner of Partner Account.                                     | Read                  |
| HZPARTIESHZ534    | Access the Partner Contact where the user is a member of the Territory assigned to the Partner Account.                               | Read                  |
| HZPARTIESHZ535    | Access the Partner Contact where the user is a member of the territory and a descendant territory is assigned to the Partner Account. | Read                  |

## QUOTES AND ORDERS

This table lists the instance set name and associated description for the Quotes and Orders business object:

| Instance Set Name             | Instance Set Description                                                                                                                                                                                                            | Required Instance Set                                                         |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
| ZCASALESORDERHEADERSZBS999939 | Access the sales order for table ZCA_SALES_ORDER_HEADERS where they're a member or in management chain of associated opportunity sales team with view, edit or full access, member of territory team or upward territory hierarchy. | <ul style="list-style-type: none"><li>View Sales Order</li><li>Read</li></ul> |
| ZCASALESORDERHEADERSZBS999941 | Access the sales order for table ZCA_SALES_ORDER_HEADERS where they're member or in management chain of associated opportunity account team, account territory team or upward territory hierarchy.                                  | <ul style="list-style-type: none"><li>View Sales Order</li><li>Read</li></ul> |



| Instance Set Name             | Instance Set Description                                                                                                                                                        | Required Instance Set                                                         |
|-------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------|
|                               |                                                                                                                                                                                 |                                                                               |
| ZCASALESORDERHEADERSZBS999948 | Access the sales order for table ZCA_SALES_ORDER_HEADERS for all associated opportunities in the business units that they're authorized within 1=1.                             | <ul style="list-style-type: none"><li>View Sales Order</li><li>Read</li></ul> |
| ZCASALESORDERHEADERSZPM5322   | Access the sales order for table ZCA_SALES_ORDER_HEADERS for all associated opportunities having a partner organization.                                                        | <ul style="list-style-type: none"><li>View Sales Order</li><li>Read</li></ul> |
| ZCASALESORDERHEADERSZPM5325   | Access the sales order for table ZCA_SALES_ORDER_HEADERS where they're in the management chain of an associated opportunity sales team member with view, edit, or full access.  | <ul style="list-style-type: none"><li>View Sales Order</li><li>Read</li></ul> |
| ZCASALESORDERHEADERSZPM5326   | Access the sales order for table ZCA_SALES_ORDER_HEADERS where they're an associated opportunity sales team member with view, edit, or full access.                             | <ul style="list-style-type: none"><li>View Sales Order</li><li>Read</li></ul> |
| ZCASALESORDERHEADERSZPM5329   | Access the sales order for table ZCA_SALES_ORDER_HEADERS where they're a member of a partner resource organization whose partner organization is on the associated opportunity. | <ul style="list-style-type: none"><li>View Sales Order</li><li>Read</li></ul> |

## QUOTE AND ORDER LINE

The Quote and Order Line object follows the same security requirements as the Quote and Order Line business object.

## SERVICE REQUEST

This table lists the instance set name and associated description for the Service Request business object:

| Instance Set Name       | Instance Set Description                                                                                                                                               | Required Instance Set |
|-------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| SVCSERVICEREQUESTSSVC1  | Access the service request header for table SVC_SERVICE_REQUESTS for all customer relationship management service requests (1=1).                                      | Read                  |
| SVCSERVICEREQUESTSSVC12 | Access the service request header for table SVC_SERVICE_REQUESTS where the customer relationship management service request is assigned to them or their subordinate.  | Read                  |
| SVCSERVICEREQUESTSSVC13 | Access the service request header for table SVC_SERVICE_REQUESTS where they or their subordinate is a member of customer relationship management service request team. | Read                  |

| Instance Set Name        | Instance Set Description                                                                                                                                                                                                   | Required Instance Set |
|--------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| SVCSERVICEREQUESTSSVC14  | Access the service request header for table SVC_SERVICE_REQUESTS where they or their subordinate is a member of customer relationship management service request account team.                                             | Read                  |
| SVCSERVICEREQUESTSSVC242 | Access the service request header for table SVC_SERVICE_REQUESTS where the customer relationship management service request is assigned to a queue that they're a member.                                                  | Read                  |
| SVCSERVICEREQUESTSSVC32  | Access the service request header for table SVC_SERVICE_REQUESTS where the customer relationship management service request is for a partner.                                                                              | Read                  |
| SVCSERVICEREQUESTSSVC35  | Access the service request header for table SVC_SERVICE_REQUESTS where their partner account is on the customer relationship management service request.                                                                   | Read                  |
| SVCSERVICEREQUESTSSVC70  | Access the service request header for table SVC_SERVICE_REQUESTS where they created the customer relationship management service request or are a member of customer relationship management service request contact list. | Read                  |

## TERRITORY

This table lists the instance set name and associated description for the Territory business object:

| Instance Set Name  | Instance Set Description                                                                                                              | Required Instance Set                                                                |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| MOTTERRITORIESMOT1 | Access the sales territory for table MOT_TERRITORIES where they're the territory owner.                                               | <ul style="list-style-type: none"> <li>View Sales Territory</li> <li>Read</li> </ul> |
| MOTTERRITORIESMOT2 | Access the sales territory for table MOT_TERRITORIES where they're the owner of a parent territory in the territory hierarchy.        | <ul style="list-style-type: none"> <li>View Sales Territory</li> <li>Read</li> </ul> |
| MOTTERRITORIESMOT4 | Access the sales territory for table MOT_TERRITORIES where they're an administrator of the territory.                                 | <ul style="list-style-type: none"> <li>View Sales Territory</li> <li>Read</li> </ul> |
| MOTTERRITORIESMOT5 | Access the sales territory for table MOT_TERRITORIES where they're an administrator of a parent territory in the territory hierarchy. | <ul style="list-style-type: none"> <li>View Sales Territory</li> <li>Read</li> </ul> |

| Instance Set Name       | Instance Set Description                                                                                                                           | Required Instance Set                                                                |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------|
| MOTTERRITORIESMOT26     | Access the sales territory for table MOT_TERRITORIES where they're a member of the territory team.                                                 | <ul style="list-style-type: none"> <li>View Sales Territory</li> <li>Read</li> </ul> |
| MOTTERRITORIESZCA100084 | Access the sales territory for table MOT_TERRITORIES where they're a member of an access group associated to the sales territory with read access. | <ul style="list-style-type: none"> <li>View Sales Territory</li> <li>Read</li> </ul> |

## WORK ORDER

This table lists the instance set name and associated description for the Work Order business object:

| Instance Set Name  | Instance Set Description                                                                                                                                                | Required Instance Set |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| SVCWORKORDERSVC214 | Access the field service work order for table SVC_WORK_ORDERS where the field service work order is standalone or associated with a service request.                    | Read                  |
| SVCWORKORDERSVC216 | Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is a member of the field service work order account team.                 | Read                  |
| SVCWORKORDERSVC217 | Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is a member of the field service work order contact team.                 | Read                  |
| SVCWORKORDERSVC219 | Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is a member of the service request team associated with the field.        | Read                  |
| SVCWORKORDERSVC220 | Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate created the service request associated with the field service work order. | Read                  |
| SVCWORKORDERSVC221 | Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate created the field service work order.                                     | Read                  |
| SVCWORKORDERSVC222 | Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is assigned to a field service work order.                                | Read                  |

| Instance Set Name  | Instance Set Description                                                                                                                                | Required Instance Set |
|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| SVCWORKORDERSVC223 | Access the field service work order for table SVC_WORK_ORDERS where their partner account is on the field service work order.                           | Read                  |
| SVCWORKORDERSVC224 | Access the field service work order for table SVC_WORK_ORDERS where the field service work order is for a partner account.                              | Read                  |
| SVCWORKORDERSVC246 | Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is the technician assigned to a field service work order. | Read                  |
| SVCWORKORDERSVC455 | Access the field service work order for table SVC_WORK_ORDERS where they or their subordinate is the technician assigned to a field service work order. | Read                  |

## Compare Active Adaptive Search Configuration to the Default Configuration

You can generate a spreadsheet that compares any changes made to the current active adaptive search configuration against the last published default configuration.

For example, you select the business objects you want to enable in Adaptive Search on the Quick subtab and click **Publish** to enable the adaptive search configuration provided by Oracle. For custom objects, the default configuration won't have any custom object configuration details.

You can modify how search operates on the Setup Advanced tab of the **Configure Adaptive Search** page. For example, you can specify which fields of an object and its related objects can be used in searches and displayed as search filters. Because Oracle configures the fields for you, setup is optional unless you want to enable search on custom child objects and fields, or to change Oracle's default search configuration. You must run the Publish process for your changes to take effect.

### Generate Adaptive Search Comparison Report

Before you run the Publish process, you can view and compare all the attributes for the custom objects in addition to any entities enabled or disabled in the unpublished configuration.

You must have the ZCA\_ADAPTIVE\_SEARCH\_CONFIG\_PUBLISH privilege to generate a comparison spreadsheet for your currently active Adaptive Search configuration against your default configuration.

1. From **Setup**, click **Advanced**.

From here you can change which objects and fields are enabled for search, how they are searched on, and other search configurations. You can also enable and disable objects for searching.

2. From the **Actions** menu, select **Compare with Previous Configuration**.

3. From the **Compare with Previous Configuration** dialog, under Records, select either **Modified** or **All** options.

4. Next, select one of these Adaptive Search configurations options:
  - Unpublished Configuration
  - Active Configurationto compare against one of these configurations:
  - Active Configuration
  - Default Configuration
5. Click **Export** to download the comparison data from Adaptive Search as a CSV file. You can then use this file to view or analyze your data offline.

The spreadsheet contains a separate tab for each object and displays a list of attributes for each object in the current configuration. The first column displays the name of the Attribute, the next four columns shows the Boolean values for the current configuration and the next four columns shows the Boolean values of the default configuration.

## Saved Search Setup

### How do I create and manage saved searches?

Use search to find specific information across the application. You can save any search you do on a page as a new saved search and can manage and setup saved searches to suit your requirements.

You can create and manage saved searches for different roles and for your own personal use. You can also assign a unique default saved search for each role. A default saved search is the search a user sees when first opening Workspace. Sales representatives can't replace or edit default saved searches assigned to them by their sales administrators. To view the assigned default saved search, or to assign a default saved search to a user role, you must have permission to view the object underlying the saved search. Sales users can create their own personal saved searches, manage them, and assign their personal default saved search. These saved searches take precedence over what you, as administrator, has assigned to them. You create and manage saved searches from the Workspace UI rather than from the Configure Adaptive Search page.

**Note:** By entering precise search criteria for your saved search, you can greatly decrease the number of records returned and decrease the load time.

**Note:** To create and manage saved searches you must have the privilege ZCA\_VIEW\_ADAPTIVE\_SEARCH\_WORKSPACE\_PRIV.

### Overview of Manage Saved Searches UI

The Manage Saved Search UI contains the **My List** tab, **Workspace List** tab, and **Set Defaults** tab. These allow administrators to manage their personal list of saved searches, assign saved searches to roles, and assign default saved searches to roles, respectively. These tabs are only exposed to administrators to:

- Assign saved searches for user roles
- Assign a default saved search for roles
- Change a default saved search for roles

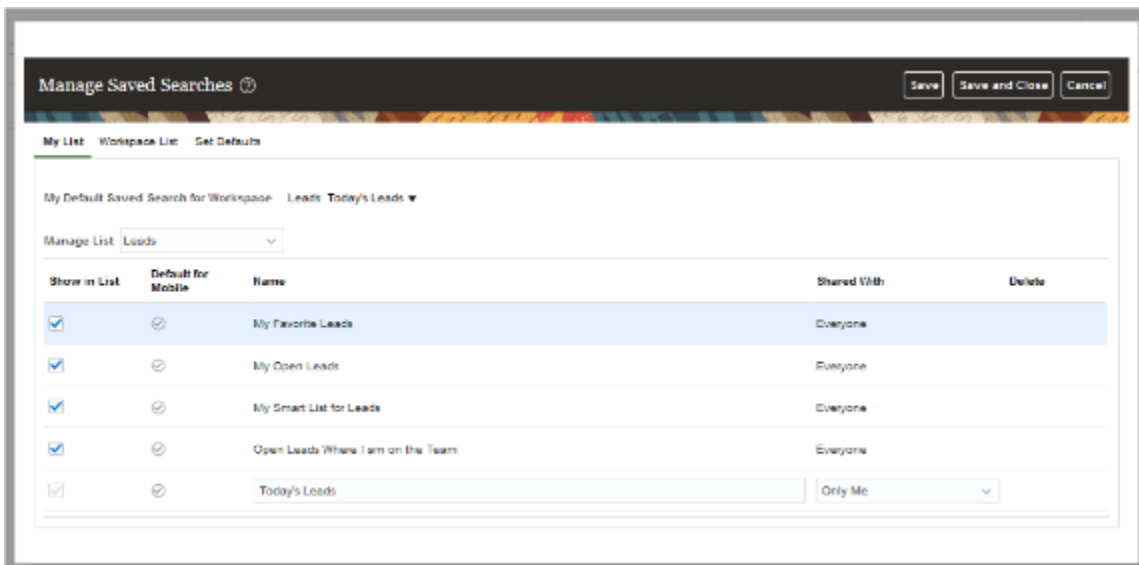
- Perform overall role-based administration

**Note:** Workspace users can manage their own personal saved searches from the Manage Saved Searches page but they won't have access to the My List, Workspace List, or Set Defaults tabs. However, mobile app users can override these restrictions and set their own default searches, too. This feature helps to display the most relevant records in their mobile app with a single tap on the menu.

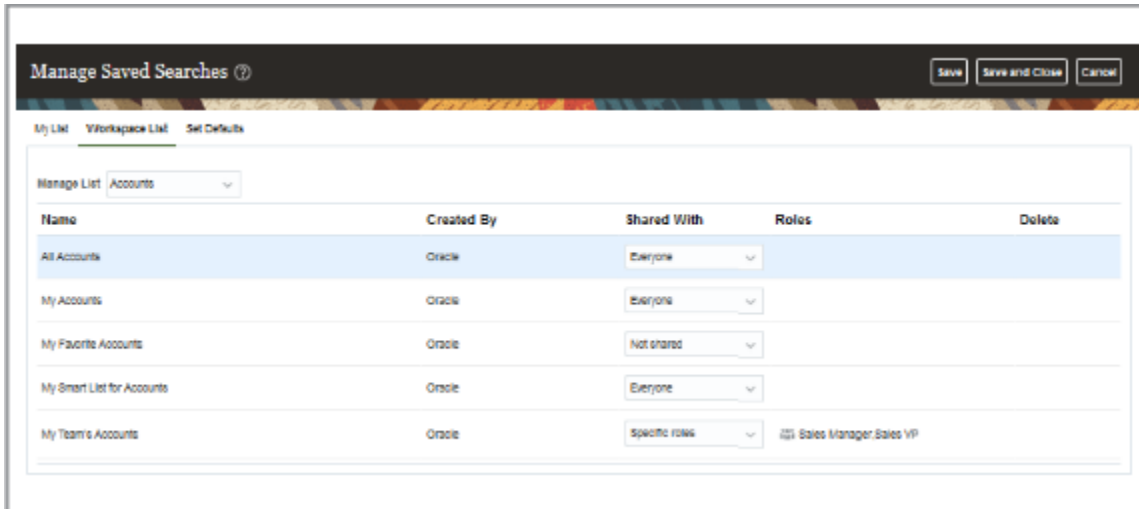
All sales users can create saved searches for themselves. But sales administrators can create saved searches for the whole sales organization and for specific sales roles. A default saved search is the saved search that's automatically displayed when the user first accesses Workspace. Oracle delivers predefined default saved searches for some user roles and the search results returned depends on what role is assigned. For example, ready-to-use partner roles include Partner Sales Representative, Partner Sales Manager, and Partner Administrator.

From the **My List** tab, you can manage your own personal saved searches exclusively, separate from the saved searches that are shared with the broader organization. Here is a screenshot of the My List window.

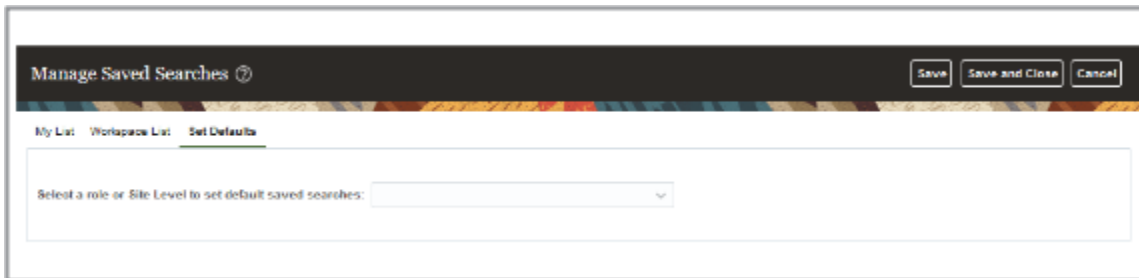
**Note:** Mobile app users can select the save searches they want from the **Default for Mobile** column.



From the **Workspace List** tab, you can share and manage saved searches with other roles. You can designate saved searches as shared with everyone, with specific user roles, or with no one. Here's a screenshot of what the Workspace List window looks like.



The **Set Defaults** tab enables you to define the default saved search for each user role. However, to assign a default saved search, you also must have permission to view that specific default saved search. Otherwise it won't appear in the list of saved searches to assign. Here's a sample screenshot of the UI.



For example, if you select Site Level, the following default saved search options are displayed for Accounts:

- All Accounts
- My Accounts
- My Favorite Accounts
- My List for Accounts

**Manage Saved Searches** ⓘ

My List Workspace List Set Defaults

Select a role or Site Level to set default saved searches: Site Level

Default Saved Search for Workspace: Contacts: All Contacts

Default Saved Search for Mobile:

| Object                | Default Saved Search  |
|-----------------------|-----------------------|
| Accounts              | My Accounts           |
| Activities            | Select...             |
| Campaigns             | All Accounts          |
| Contacts              | My Accounts           |
| Leads                 | My Open Leads         |
| Opportunities         | My Open Opportunities |
| Partner Contacts      |                       |
| Partners              |                       |
| Quote and Order Lines | My Active Quote Lines |
| Quotes and Orders     | My Active Quotes      |

If you select a specific role, such as Sales Representative, then you may want to select the My Accounts option as your default saved search as shown in this sample screenshot.

**Manage Saved Searches** ⓘ

My List Workspace List Set Defaults

Select a role or Site Level to set default saved searches: Sales Representative

Default Saved Search for Workspace: Contacts: All Contacts

Default Saved Search for Mobile:

| Object                | Default Saved Search  |
|-----------------------|-----------------------|
| Accounts              | My Accounts           |
| Activities            | My Open Tasks         |
| Campaigns             | Select...             |
| Contacts              | My Contacts           |
| Leads                 | My Open Leads         |
| Opportunities         | My Open Opportunities |
| Quote and Order Lines | Select...             |
| Quotes and Orders     | My Active Quotes      |
| Service Requests      | Select...             |



## Create a Saved Search

Here's how you can create a saved search either for yourself or for others in the organization. The saved searches you create are available for selection in Workspace and also appear as filters in the actionable infolets and Workspace infolets. The saved searches are listed in alphabetic order.

1. In Workspace, select a saved search as your starting point. For example, the **All Accounts** saved search provided by Oracle lets you create your saved search for all the accounts you can see.
2. Enter your search terms. You can enter search terms in the **Search** box, add filters, select filter values, or any combination of these.
3. You can add or change the columns displayed in the search results by clicking **Edit Columns** (the pencil icon highlighted by callout 2 in the following screenshot).
4. Click **Save As** (highlighted by callout 1).

The screenshot shows the 'Workspace' interface with a search for 'Health & Fitness' accounts. The results table lists various gyms and fitness centers. Callout 1 points to the 'Save As' button, and callout 2 points to the 'Edit Columns' (pencil) icon.

| Primary Industry         | Name              | Primary Address                            |
|--------------------------|-------------------|--------------------------------------------|
| Health & Fitness         | 24-7 ProFitness   | 59 Summit Way, YOUNGSTOWN, OH 44555        |
| High Technology          | Acadia Gym        | 6815 Southoff Place, KANSAS CITY, MO 64149 |
| Industrial Manufacturing | Advanta Gym       | 4412 Stillwater Ave, CHEYENNE, WY 82009    |
| Retail                   | Aegon Fitness Gym | 9287 Thompson Circle, SEATTLE, WA 98115    |
| Healthcare               | Aavi Genomic Gym  | 4595 Las Vegas Blvd S, LAS VEGAS, NV 89109 |
| Professional Services    | Akebia Gym        | 6856 Harrison Ave, BUTTE, MT 59701         |
|                          | Alaska Gym        | 901 W 6th Ave, ANCHORAGE, AK 99501         |
|                          | Alpine Gym        | 2 Carberry Park, PROVIDENCE, RI 02912      |

**Create Saved Search**

\* Name: Health & Fitness Accounts

☐ Set as my default saved search

Shared: Everyone

Create Cancel

5. Enter the name for your saved search. Remember that the saved searches are listed in alphabetic order.
6. To make this saved search the default saved search for you personally, select the **Set as my default saved search** option. The default saved search is what you see whenever you navigate to Workspace.
7. Specify how you want to share the saved search you're creating. There are three options:

- Only Me
- Everyone
- Specific Roles

8. If you selected **Specific Roles**, click **Search** (the people icon) and select the job roles.
9. Click **Create**.

#### *Related Topics*

- [How can I view and assign a default saved search for a role?](#)
- [Why does the Default Saved Search field display with either no name or with a Select drop-down list?](#)

## Manage List of Personal Saved Searches

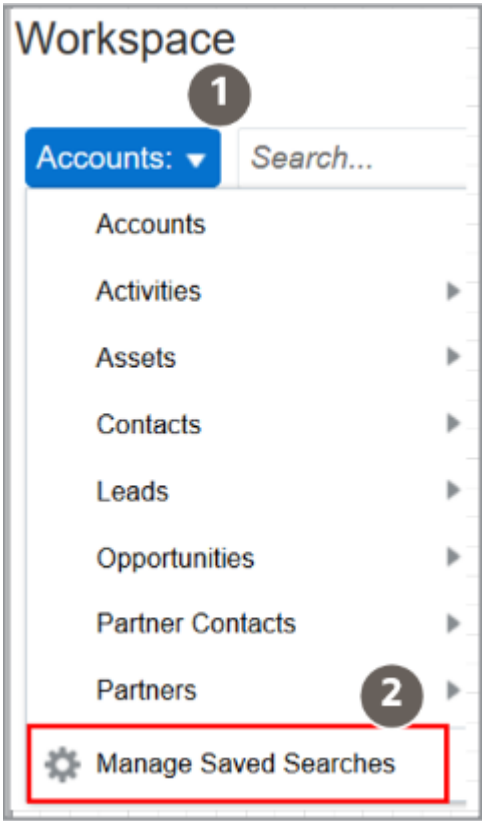
From the My List tab of the Workspace UI, you can manage your own personal saved searches exclusively, separate from the saved searches that are shared with the broader organization.

Here are the steps to help you manage your own personal saved searches for a business object:

1. Select the business object.

2. From the same menu select **Manage Saved Searches**, then select the **My List** tab.

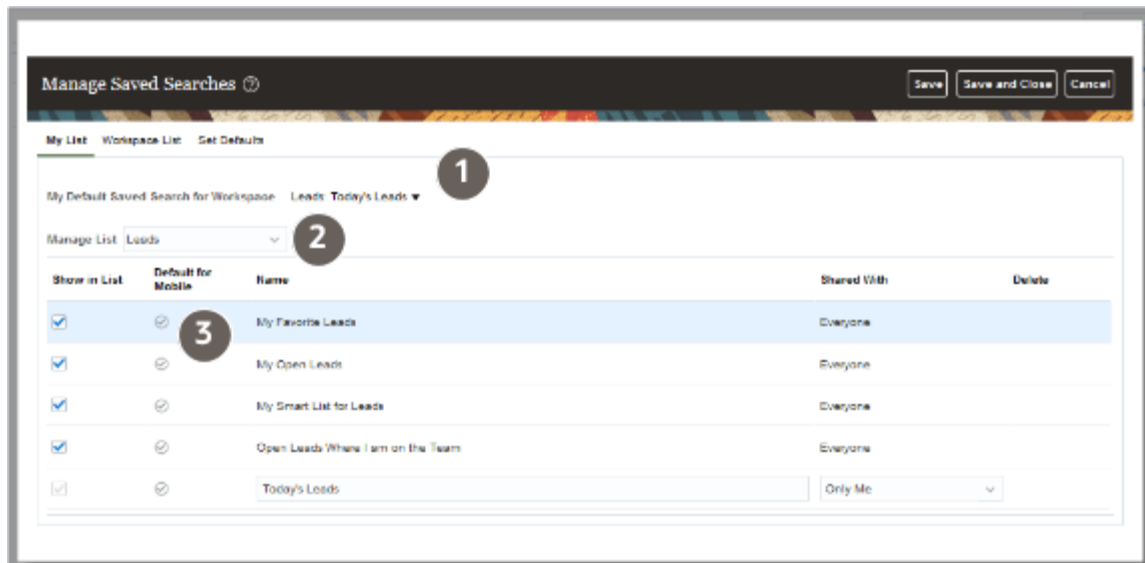
Here's a screenshot of the list of items that appears when you click the selector. The image highlights the Manage Saved Searches task, the last selection on the list.



This screenshot shows the My List tab as seen by administrators. The table describes the columns highlighted in the screenshot by callouts.

| Callout Number | Column Name                           | Description                                                                                                                                                                                                          |
|----------------|---------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1              | My Default Saved Search for Workspace | This is the signed in user's personal default saved search. The user can keep the default saved search assigned by the administrator, or change the saved search to a different one contained in the drop-down list. |
| 2              | Manage List                           | The business object containing the saved searches you're managing. For example, by selecting Accounts for Manage List, saved searches based on the Account business object will appear.                              |
| 3              | Default for Mobile                    | The saved search appears in the list of saved searches for mobile users when                                                                                                                                         |

| Callout Number | Column Name | Description                                                                                                                                                 |
|----------------|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                |             | this option is selected. While you can't delete lists provided by Oracle, you can hide them from mobile users by deselecting the Default for Mobile option. |



3. Update your personal saved searches. You can:
  - Rename saved searches you created
  - Hide any of the shared searches from the shared group by deselecting **Show in List**.
  - Specify searches for the whole organization by selecting **Everyone** from the **Shared With** list.
  - Specify searches for users with one or more specific job roles, by selecting **Specific Roles** from the **Shared With** list. The saved search can then be managed from the Workspace List tab, where you assign the specific roles permission to view the saved search. You must click **Save** before proceeding to the Workspace List tab.
  - Delete saved searches you created from the application by clicking **Delete**.
4. Click **Save and Close** when you're done.

If you're sharing a saved search with other user roles, click **Save** to proceed and manage those saved searches in the appropriate Workspace List or Set Defaults tabs.

## Share and Manage Saved Searches List with Other Job Roles

From the Workspace List tab, you can share and manage saved searches with other roles. You can designate saved searches as shared with everyone, with specific user roles, or with no one.

The **Set Defaults** tab lets you define the default saved search for each user role.

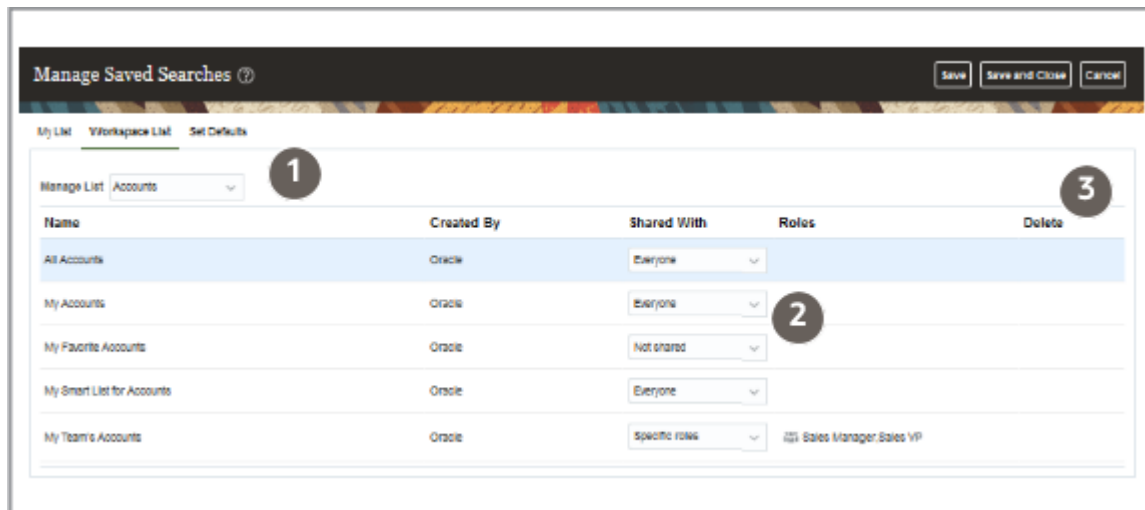
## Share and Manage Saved Searches with Other Roles

Here are the steps to help you manage and share saved searches with other roles:

1. Select the business object.
2. From the same menu select **Manage Saved Searches**, then select the **Workspace List** tab.

This screenshot shows the Workspace List tab as seen by administrators. The table describes the columns highlighted in the screenshot by callouts.

| Callout Number | Column Name | Description                                                                                                                                                                                                                        |
|----------------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1              | Manage List | The business object containing the saved searches that are shared across roles. For example, by selecting Accounts for Manage List, saved searches based on the Account business object will appear.                               |
| 2              | Shared With | You can share a saved search with <b>Everyone</b> (all job roles) in the organization or with <b>Specific roles</b> , (specific job roles). You can also select <b>Not shared</b> if you don't want to share with other job roles. |
| 3              | Delete      | Deletes the saved search from the application. You can't delete saved searches provided by Oracle.                                                                                                                                 |



3. Click the **Workspace List** tab to update the saved searches. You can:
  - Specify searches for the whole organization by selecting **Everyone** from the **Shared With** list.
  - Specify searches for users with one or more specific job roles, by selecting **Specific roles** from the **Shared With** list and then selecting the job roles by clicking Search (the people icon).

- Delete saved searches you created from the application by clicking **Delete**.
- 4. Click **Save and Close** when you're done.  
If you want to define the saved search as the default saved search for a user role in the Set Defaults tab, or if you want to navigate to the My List tab, first click **Save** before you leave the Workspace List tab.

## Define the Default Saved Search for Each User Role

The default saved search is the saved search that will automatically display when the user first accesses Workspace. With the Set Defaults tab, you can define or change a default saved search for any user role.

Here are the steps to help you define or change a default saved search for any user role:

1. Select the business object.
2. From the same menu select **Manage Saved Searches**, then select the **Set Defaults** tab.  
This screenshot shows the **Set Defaults** screen as seen by administrators when they select the set defaults at the site level.

3. Click the **Set Defaults** tab to define or change a default saved search for any user role.  
**Note:** Saved searches that you don't have permission to access, don't appear in the Default Saved Search drop-down list. To see the assigned default saved search in the drop-down list, and to assign the default saved search to a role, you must have permission to view the object underlying the saved search.
4. Scroll the page until you see the role name and its default saved search that you either want define or change for any user role.
5. From the drop-down list select a new role name for the default saved search or change to a different role contained in the drop-down list.
6. Click **Save and Close** when you're done.

If you want to manage your saved searches in the Workspace List tab, or if you want to navigate to the My List tab, first click **Save** before exiting the Set Defaults tab.

## Set Default Saved Searches for Mobile App Users

Saved searches are predefined for Workspace users. In addition, you can set the default saved search per object for mobile app users for either specific roles or for the whole site.

Mobile users can override these and set their own default searches, to display the most relevant records in their mobile app with a single tap on the menu.

The **Set Defaults** tab enables you to define the default saved search for each user role. However, to assign a default saved search, you also must have permission to view that specific default saved search. Otherwise it won't appear in the list of saved searches to assign. From example, you might select the role Channel Account Manager from the **Select a role or Site Level to set default saved searches:** drop down and select All Deal Registrations as your **Default Saved Search for Workspace:**. You can also select a default saved search for other objects from the Set Defaults tab of the Manage Saved Searches page. Here's a sample screenshot of the UI.

The screenshot shows the 'Manage Saved Searches' interface with the 'Set Defaults' tab selected. At the top, there are three buttons: 'Save', 'Save and Close', and 'Cancel'. Below the tabs, there are two dropdown menus. The first is labeled 'Select a role or Site Level to set default saved searches:' and has 'Channel Account Manager' selected. The second is labeled 'Default Saved Search for Workspace:' and has 'Deal Registrations: All Deal Registrations' selected. Below these, there is a section titled 'Default Saved Search:' containing a table with two columns: 'Object' and 'Default Saved Search'.

| Object                | Default Saved Search                                                                                                                                                           |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Accounts              | All Accounts                                                                                                                                                                   |
| Activities            | Select...<br>Select...<br>My Appointments<br>My Call Reports<br>My Calls to Log<br>My Open Tasks<br>My Overdue Tasks<br>Tasks Due in the Next 30 Days<br>Upcoming Appointments |
| Assets                | Select...                                                                                                                                                                      |
| Contacts              | Select...                                                                                                                                                                      |
| Deal Registrations    | Select...                                                                                                                                                                      |
| Leads                 | Select...                                                                                                                                                                      |
| Opportunities         | Select...                                                                                                                                                                      |
| Partner Contacts      | Select...                                                                                                                                                                      |
| Partners              | Select...                                                                                                                                                                      |
| Quote and Order Lines | Select...                                                                                                                                                                      |

## Set Up Search Results in Groups

To display search results in groups based on the specific fields on the object or related objects, you must set the **Enable Group By** in **Workspace** parameter to **Y**.

When the parameter is enabled, salespeople can view an overview of the number of records in each **Grouped By** grouping and can search and filter records within these groupings. They can also view aggregates such as count, average, and sum of values on the records of each group.

### Enable Group By in Workspace Parameter

Here's how to set the **Enable Group By** parameter.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Configure Adaptive Search
3. On the **Configure Adaptive Search** page, click the **Parameters** tab.
4. Highlight the **Enable Group By** and click **Edit**.
5. In the Warning message, click **Yes**.
6. In the **Current Value** field, change the value from **N** to **Y** and click **Save and Close**.

### Specify Fields to Use for Group By

Here's how to specify field values for display as a filter in your **Group By** search.

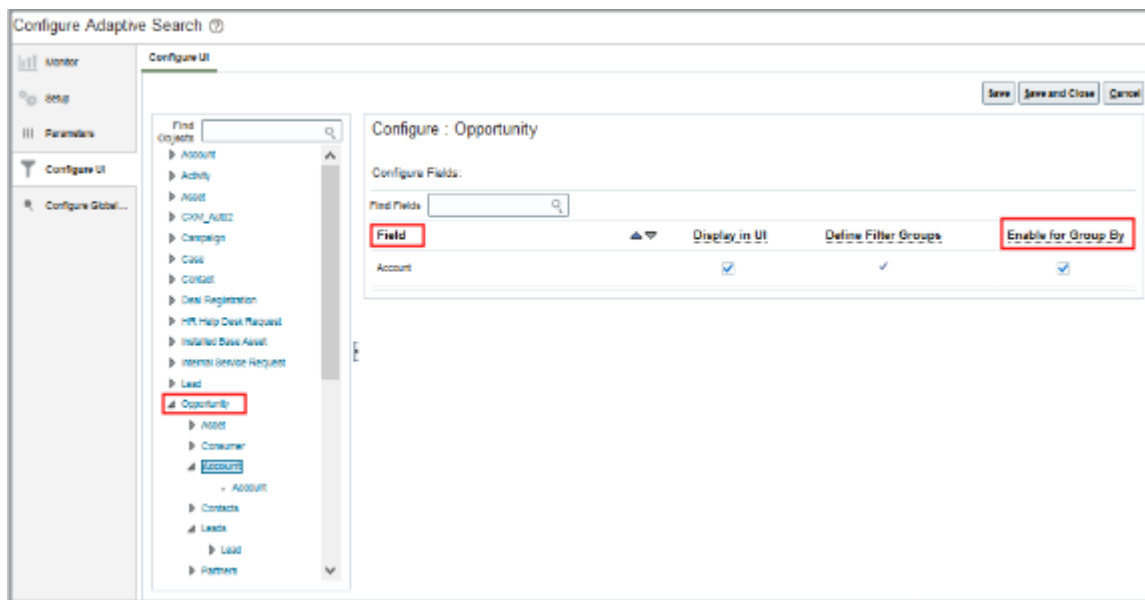
1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area, and use:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Show: All Tasks
  - o Task: Configure Adaptive Search

The **Configure Adaptive Search** page appears.

3. Click the **Configure UI** tab.



4. Select the object where you want to set up field values for your Group By search in the left pane of the tab. You may have to open up the object hierarchy. The fields for the object display in the Configure fields pane on the right as highlighted in the sample screenshot.



5. Select the **Enable for Group By** option for the fields you want to enable for use as a Group By search in the UI.

**Note:** Ensure that the **Display in UI** option is also selected

6. Click **Save and Close**.
7. Sign out and then sign in again to see your changes.

No publishing is required. The changes you made are reflected in the Workspace UI for the Group By field drop down lists for the selected object.

**Note:** If you decide to turn off the **Enable for Group By** option, any saved searches you created will continue to work but won't have the group by functionality. However, if you decide to enable the group by feature again and if you didn't make any changes to your saved searches, then the group by feature will continue to function for your saved searches. If the **Enable for Group By** parameter is disabled and you update an existing saved search that has the group by option, then the saved search will be updated as a saved search without group by.

## Supported Objects and Predefined Fields for Group By

Here are the supported objects and the associated predefined fields that are available for display as filters for your Group By search.

This list contains the standard predefined configuration but you can specify field values for display as a filter in your Group By search by going to the **Configure Adaptive Search > Configure UI > Enable for Group By**.

Fields in parentheses represents the associated Adaptive field attribute.

| Business Object      | Fields Enabled for Group By                                                                                                                                                                                                             |
|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account              | <ul style="list-style-type: none"> <li>Industry (PrimaryIndustry)</li> <li>Type (SalesProfileType)</li> <li>State - from the Primary Address (PrimaryAddress.State)</li> <li>Account Score (AccountScore)</li> </ul>                    |
| Activity             | <ul style="list-style-type: none"> <li>Type (ActivityTypeCode)</li> <li>Priority (PriorityCode)</li> <li>Status (StatusCode)</li> <li>Primary Contact (PrimaryContactId)</li> </ul>                                                     |
| Asset                | <ul style="list-style-type: none"> <li>Account (Account)</li> <li>Product (Product)</li> <li>Product Group (ProductGroup)</li> </ul>                                                                                                    |
| Contact              | <ul style="list-style-type: none"> <li>Account (PrimaryAccount)</li> </ul>                                                                                                                                                              |
| Lead                 | <ul style="list-style-type: none"> <li>Status -Unqualified, Qualified, Converted, Retired (StatusCode)</li> <li>Lead (Score)</li> <li>Lead Rank -Hot, Warm, Cold (Rank)</li> <li>Week - on lead creation date (CreationDate)</li> </ul> |
| Opportunity          | <ul style="list-style-type: none"> <li>Win Probability (PrimaryRevenue.WinProb)</li> <li>Month - on close date (EffectiveDate)</li> <li>Close Date</li> <li>Sales Stage</li> <li>Account (CustomerAccount)</li> </ul>                   |
| Partner              | <ul style="list-style-type: none"> <li>Tier (TierId)</li> <li>Partner Type (ListOfPartnerTypes.AttributePk2)</li> <li>Status (Status)</li> </ul>                                                                                        |
| Partner Contact      | <ul style="list-style-type: none"> <li>Partner (Partner)</li> </ul>                                                                                                                                                                     |
| Quote and Order Line | <ul style="list-style-type: none"> <li>Account (Account)</li> <li>Opportunity</li> <li>Product Name</li> </ul>                                                                                                                          |
| Quotes and Orders    | <ul style="list-style-type: none"> <li>Account (Account)</li> <li>Opportunity</li> </ul>                                                                                                                                                |
| Revenue Lines        | <ul style="list-style-type: none"> <li>Account</li> <li>Close Date</li> </ul>                                                                                                                                                           |

| Business Object | Fields Enabled for Group By                                                                                                                                                                            |
|-----------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 | <ul style="list-style-type: none"><li>• Win Probability</li></ul>                                                                                                                                      |
| Service Request | <ul style="list-style-type: none"><li>• Severity (SeverityCd)</li><li>• Status (StatusCd)</li><li>• Queue (Queue)</li><li>• Product (InventoryItemId)</li><li>• Category Name (srCategoryID)</li></ul> |

## Advanced Setup

### Field Search Setup

#### How Search Action is Modified

During Adaptive Search setup, you can decide which fields of a business object and its related objects can be used in searches and displayed as search filters.

For example, you can make it possible for salespeople to search for accounts using the account's primary contact name in the Workspace UI. You can also enable the account primary contact name for use in opportunity searches. When a salesperson searches on the account primary contact name in the opportunity Search box, the application lists all of the opportunities belonging to the accounts that have the individual listed as the primary contact.

**Note:** By entering precise search criteria for your saved search, you can greatly decrease the number of records returned and decrease the load time.

Adaptive Search supports relationships between the ready-to-use standard business objects. It also supports one-to-one and one-to-many custom relationships between standard and custom objects. Setup is done on the Advanced setup tab of the Configure Adaptive Search page. You select the business object you want to set up in the left pane of the tab, and set the object's search properties in the right pane.

**Note:** To be able to search on a particular attribute in Global Search, you must select the **Include in Keyword Search** option for that attribute.

Here's a screen capture of the Advanced setup tab of the Configure Adaptive Search page.

## Configure Adaptive Search ?

The screenshot displays the 'Configure Adaptive Search' interface. On the left, a sidebar contains navigation links: Monitor, Setup, Parameters, Configure UI, and Configure Glo... The 'Setup' tab is active, showing a list of objects with checkboxes for selection. The 'Account' object is selected, and its fields are listed in the right pane. The right pane is titled 'Configure : Account' and contains a table of fields with columns: Field, Display Name, Type, Enable, Analyzed Text Search, and Include in Keyword Search.

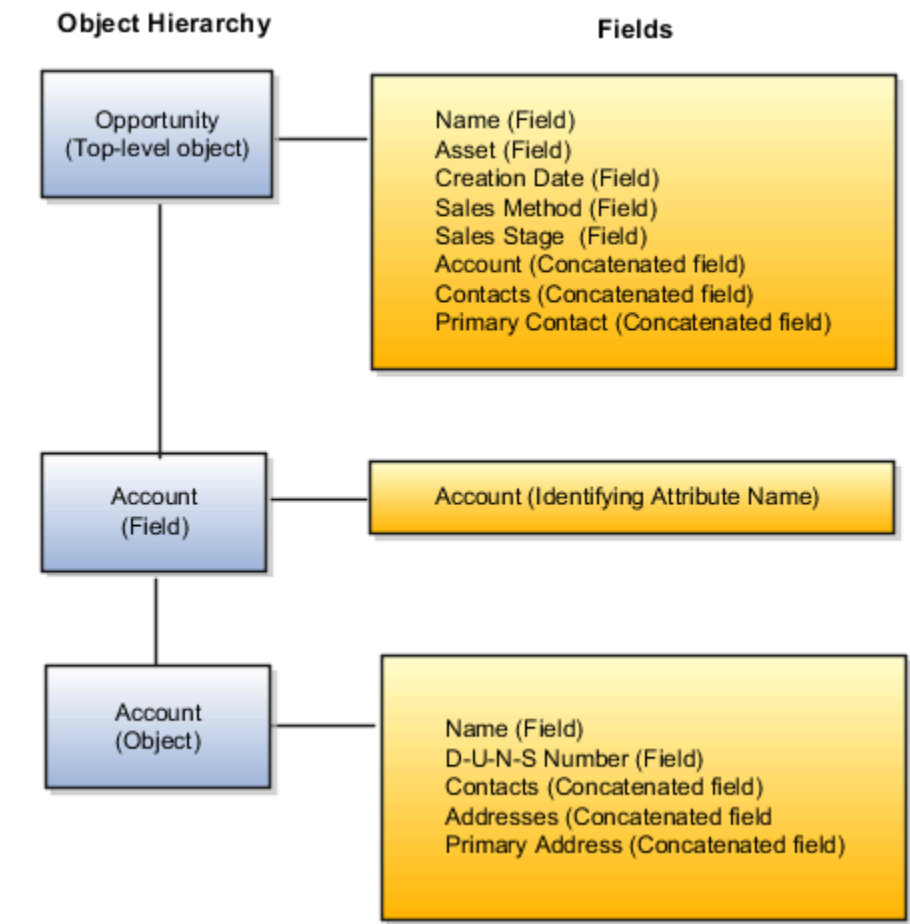
| Field                               | Display Name                           | Type                       | Enable                              | Analyzed Text Search                | Include in Keyword Search           |
|-------------------------------------|----------------------------------------|----------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| PartyName                           | Account Name                           | Text                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| AccountRollup                       | Account Rollup                         | Child/Related Object       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| AccountScore                        | Account Score                          | Number                     | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| AccountScoringTier                  | Account Scoring Tier                   | Text                       | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| AccountCustNum_c                    | AccountCustNum                         | Number                     | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| AccountCustText_c                   | AccountCustText                        | Text                       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| ListOfAddresses                     | Addresses                              | Child/Related Objects List | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| CeoName                             | Chief Executive Name                   | Text                       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| ListOfContacts                      | Contacts                               | Child/Related Objects List | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| CreatedBy                           | Created By                             | Text                       | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| CreationDate                        | Creation Date                          | Datetime                   | <input checked="" type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/>            |
| CurrentFiscalYearPotentialRevenu... | Current Fiscal Year's Potential Rev... | Number                     | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| DbRating                            | D&B Credit Rating                      | Text                       | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |

## Left Pane - Select Objects and Related Objects

In the left pane of the tab, you can:

- Enable and disable each business object for the Workspace UI by selecting its check box. (This is the equivalent of enabling the objects on the Quick Setup tab.)
- Expand each object to view the hierarchy of related objects.
- Select an object or a related object in the hierarchy to display its fields in the right pane.

As an example, here's a diagram of a portion of the related object hierarchy for opportunities and some of the fields each level of the hierarchy includes.



Here's an explanation:

| Hierarchy Level | Object Name | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1               | Opportunity | <p>Selecting the Opportunity top-level object in the left pane lets you specify the search operation for opportunity fields.</p> <p>The list includes opportunity fields, such as name, asset, creation date, sales method, and sales stage and fields created by Workspace representing the related objects. These concatenated fields include all of the configuration settings for each related object.</p> <p>For example, the Account field includes your configuration of search terms and settings for the Account object, the Contacts field includes the configuration for the Contacts object, and so on.</p> |
| 2               | Account     | <p>An opportunity includes a field called Account where you enter the name of the account related to the opportunity. When you select Account in the left pane, the right pane only displays one field: Account.</p>                                                                                                                                                                                                                                                                                                                                                                                                    |

| Hierarchy Level | Object Name | Description                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                 |             | <p>The Account field in the right pane displays the identifying attribute name for the respective objects as follows:</p> <p><b>Entity - Identifying Attribute Name</b></p> <ul style="list-style-type: none"> <li>Account - Name</li> <li>Activity - Subject</li> <li>Asset - Asset Number</li> <li>Contact - Name</li> <li>Lead - Lead Name</li> <li>Opportunity - Name</li> <li>Partner - Name</li> <li>Partner Contact - Name</li> </ul> |
| 3               | Account     | <p>Selecting the Account object in the hierarchy displays the list of fields you can enable and configure for accounts. Configuring the Account object is the same as configuring the Account top-level object: the list of fields is the same and your selections affect all objects that include Account as a related object.</p>                                                                                                          |

## Right Pane - Configure Search Action for Your Selection

The right pane of the tab, Configure Fields, is where you control the search properties for fields of the object or related object you selected. Depending on the field, there are up to four options you can select:

| Option               | What It Does                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enable               | <p>Enables the field for search. After you publish your setup and the indexing process completes successfully, you can:</p> <ul style="list-style-type: none"> <li>Search using the field and include it in filters</li> <li>Display it as a column in the Workspace table</li> </ul>                                                                                                                                                                                                                                                                                                          |
| Analyzed Text Search | <p>This option is available for text fields only. Workspace can search text fields either as a single string or as individual indexed words. Selecting this option indexes individual words and enables fuzzy match and additional operators that you can use when searching the field. Fuzzy match makes it possible to search for similar spellings.</p> <p>Selecting the <b>Analyzed Text Search</b> option, enables these operators:</p> <ul style="list-style-type: none"> <li>All of the words</li> <li>Any of the words</li> <li>Contains</li> <li>Ends with</li> <li>Equals</li> </ul> |

| Option                      | What It Does                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                             | <ul style="list-style-type: none"><li>• Fuzzy match</li><li>• None of the words</li><li>• Not equal to</li><li>• Starts with</li></ul> <p>Leaving the <b>Analyzed Text Search</b> option deselected, restricts you to these operators:</p> <ul style="list-style-type: none"><li>• Equals</li><li>• Exists</li><li>• Is missing</li><li>• Not equal to</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Include in Keyword Search   | <p>Makes it possible to search on the field using the Search box at the top of the Workspace UI and enables keyword search on fields in Adaptive Search REST API. To be able to search on a particular attribute in Global Search, you must select the Include in Keyword Search option for that attribute.</p> <p>The Adaptive Search application copies all the fields marked as <b>Include in Keyword Search</b> to a concatenated field that's made available for the search. If you select this option for five account fields, then the five are concatenated in a field and all five can be used in searching accounts. If you include too many fields as <b>Include in Keyword Search</b>, the accuracy of the search may diminish.</p> <p><b>Note:</b><br/>Date fields and numeric fields aren't supported for <b>Include in Keyword Search</b>.</p> |
| Include in Object Reference | <p>Enables the field for use in searches of related objects. You can enable up to 15 fields. For example, if you select this option for the Chief Executive Name on the Account object, you can enable this field also for searching opportunities.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

**Note:** Formula fields can't be configured in Adaptive Search because they aren't searchable and can't be indexed.

## How do I make a field searchable in the UI?

You can enable additional fields for search, including custom ones. You can also remove existing fields from use.

By default, the work areas powered by Adaptive Search include all of the key fields you need for search. (See the topic [Adaptive Search Configuration Provided by Oracle](#) for a list.)

To make the field searchable in work areas powered by Adaptive Search and Global Search, including Sales in the Redwood User Experience, involves these steps:

1. You must make the field searchable for its business object.
2. Optionally, you can enable the field for search of a related object.
3. You must publish your configuration.

**Note:** If you want the field to be displayed in the UI, either as a filter or as a column in search results, then you must enable it for display on the Configure UI tab of the Configure Adaptive Search page.

This example shows you how to enable the Chief Executive Name field, a standard application text field, but the same procedure applies to any field, even a custom field on a standard application object. When you're done with this

configuration and publish it, a salesperson can enter the CEO name, in either Global Search or in the search box for those work areas powered by Adaptive Search, to find the account where the person is the CEO. The search also returns all of the opportunities for that account when you enable opportunities to be searched by account fields.

Suppose that you added the CEO name field to the Account UI and want to make entries in this field searchable. Here's a screenshot of the Edit Account page highlighting the location of the field.

## Make the Field Searchable in Its Business Object

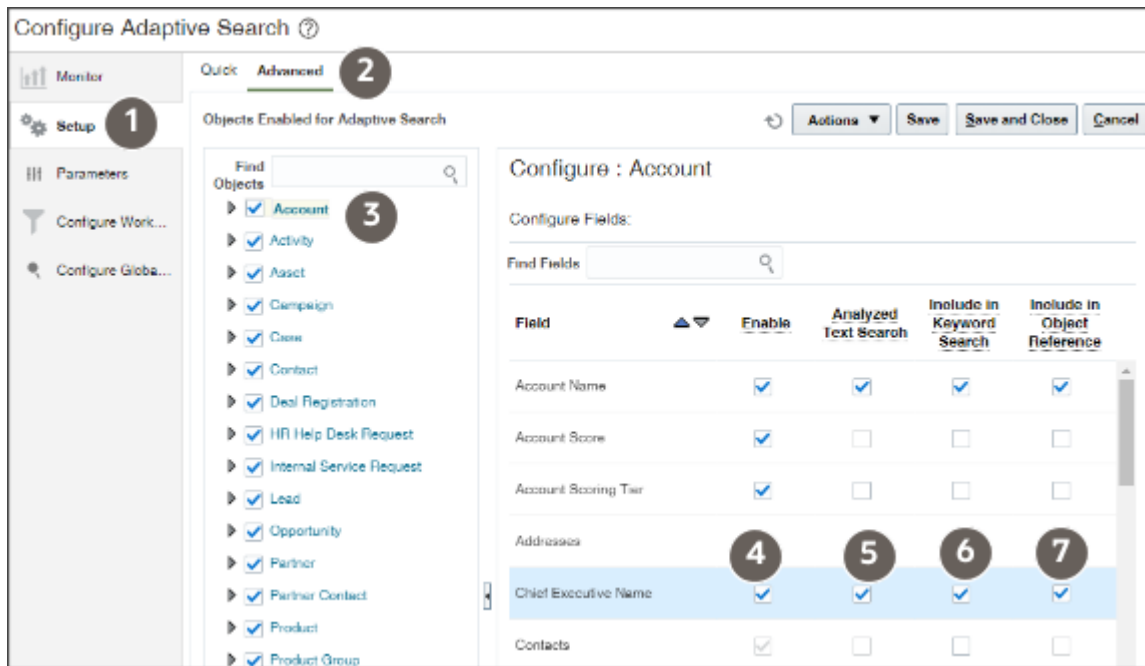
Here's how you make the field available for searching its business object. For example, making the account searchable by the CEO name.

1. Navigate to the Setup and Maintenance work area, and use the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Show: All Tasks
  - o Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, Setup tab (callout 1 in the screenshot), click **Advanced** (callout 2).



3. In the left pane, click the name link for the object where the custom field appears (callout 3). The CEO name field is an account field, so you click **Account**.

The field is listed in the Configure Fields section.



4. Select the **Enable** option to index the field for Workspace and Global Search (callout 4).
5. For a text field, including Chief Executive Officer, select the **Analyzed Text Search** option to index individual words in the field. Your selection also enables fuzzy search (search that retrieves results with similar spellings). And you enable other search operators, including **All of the words** and **Any of the words**.

**Note:** For fuzzy search to work, the first 3 characters of the word should match and in the remaining part of the word there can be 1 character difference. This can be changed to 2 characters difference if needed, but the first 3 characters still need to match.

6. Select the **Include in Keyword Search** option to enable the field for both Global Search and search using the Workspace search box.

**Note:** Because they're Personal Identifiable Information (PII), you can't make contact email addresses and phone numbers available for search using global search or the Workspace search box.

If you leave this check box deselected, users can't search for accounts using the CEO name. But in Workspace, they can still add the Chief Executive Name field as a filter for accounts and search the field there. Global Search doesn't permit you to add filters, only to search by keyword.

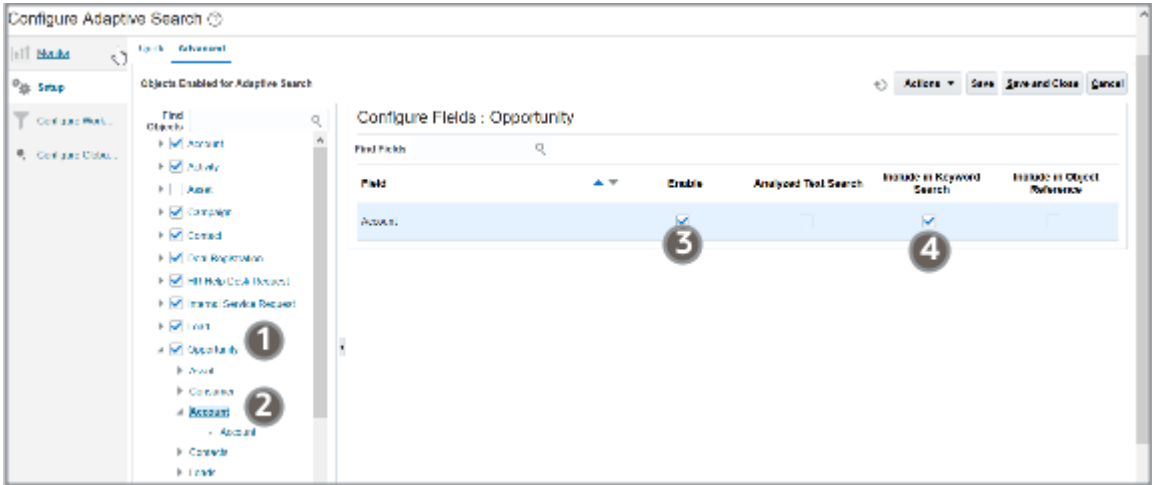
7. Select the **Include in Object Reference** option to enable the field for search in related objects. You can enable up to 15 fields. Make the selection if you want to use the CEO name when searching for opportunities, for example.

If you didn't select the **Include in Keyword Search** option, but select **Include in Object Reference**, then users searching opportunities can use the field only as a filter in Workspace.

Make the Field Available for Searching a Related Object

You can only make the field available for search in a related business object if you selected the **Include in Object Reference** option for the field.

1. In the left pane of the window, open the object where you want to enable the search. For this example, Opportunity (callout 1 in the screenshot).



2. Select the field in the left pane, in this example, Account (Callout 2).
3. In the right pane, select **Enable** (callout 3).
4. If you want to use the field for searches in Global Search and in the Workspace Search box, you must select the **Include in Keyword Search** option (callout 4).

If you don't select this option, but selected Enable, then the field remains available as a filter in Workspace, but can't be searched in Global Search.

The Include in Object Reference option isn't relevant here. Here's a summary of the two use cases:

| Use Case                                                                                                                                                                                                                                                                                                                                                                                                                              | Enable   | Include in Keyword Search |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|---------------------------|
| Users can search on the field using Global Search and in the Workspace Search box. For example, entering the CEO name, they get results containing, not only the account where the person is a CEO, but the opportunities for that account as well. In Workspace, they can also select the fields as a filter when searching for the object. For example, when searching for opportunities in Workspace, they can filter by CEO name. | Selected | Selected                  |
| Users can add the field as a filter in Workspace, but can't search on it using the Search box or using Global Search.                                                                                                                                                                                                                                                                                                                 | Selected | Deselected                |

## Publish Your Configuration

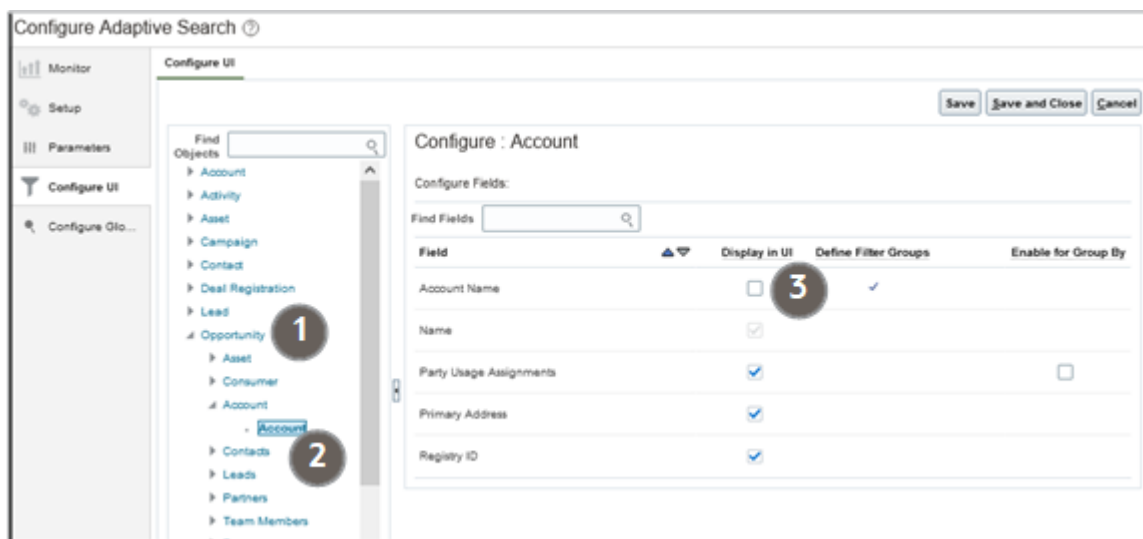
After making your option selections, click **Publish**.

Publishing triggers an indexing process that you can monitor on the Monitor tab, Publish subtab. Your new configuration becomes available after the indexing process completes. If the process completes with errors for some reason, contact your help desk.

## Enable the Field for Use As a Filter in the UI

For the field to be used as a filter and added as a column in search results, you must enable it for display on the UI:

1. In the Configure Adaptive Search page, click **Configure UI**.
2. To enable the field for use as a filter on its object (for example, to enable the account field to be used as a filter when searching accounts), do the following:
  - a. Select the object in the left pane of the Configure UI tab.
  - b. Select the **Display in UI** option for the field.
3. To enable the field for use in the UI of other related objects (for example, to enable the account field as a filter in opportunity searches), do the following:
  - a. Display the related object hierarchy for the object where you want to enable the filter in the left pane of the Configure UI tab. For example, select Opportunity (callout 1 in the following screenshot).
  - b. Locate and select the field's object in the object hierarchy. For example, select Account (callout 2).
  - c. Select **Display in UI** option for the field (callout 3).



4. Click **Save and Close**.

### Related Topics

- [Adaptive Search Configuration Provided by Oracle](#)

## Example of Including All Addresses in Account Searches

By default, Workspace makes it possible for you to use the fields in the primary address in searching accounts using the Search box.

For example, if you enter the word "main" as a search term when searching for accounts, the application returns accounts with the word "main" in their names as well as accounts with primary addresses on "Main Street", "Main Avenue" and so on. If your accounts have multiple addresses, you can broaden the search to include all of the addresses. To be able to search on a particular attribute in Global Search, you must select the **Include in Keyword Search** option for that attribute.

To broaden account searches to include all addresses for searching accounts:

1. Navigate to the Setup and Maintenance work area, and use the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Configure Adaptive Search

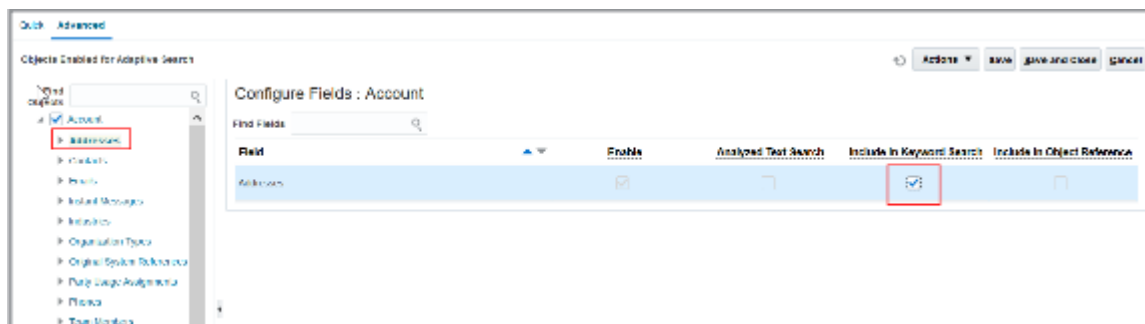
The Configure Adaptive Search page appears.

2. Click **Advanced**.
3. In the left pane of the tab, open the Account object to reveal its related objects.
4. Select the **Addresses** related object.

The right pane, Configure Fields: Account displays the concatenated Addresses field.

5. Make sure the **Enable** option is selected for the Addresses field.
6. Select the **Include in Keyword Search** option.

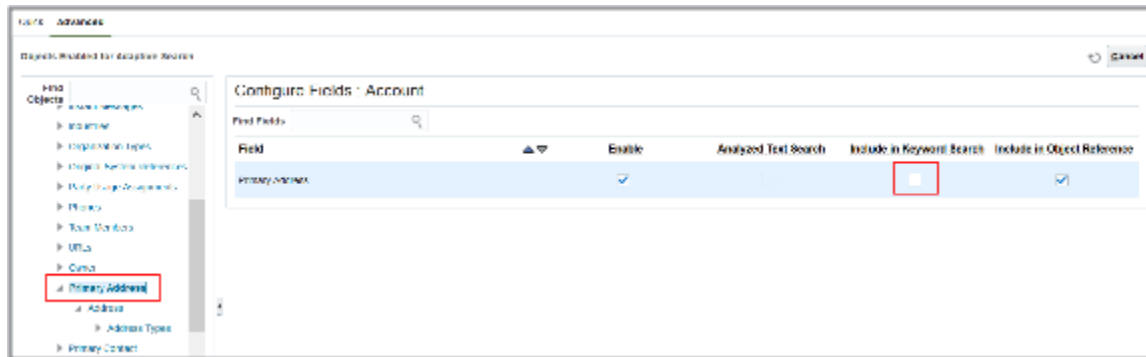
Here's a screen capture of the Advanced tab of the Configure Adaptive Search page highlighting the selection of the Account Addresses in the left pane and the Addresses field with the selected **Include in Keyword Search** option in the right pane.



7. Now that all addresses are included in account searches, you can exclude the primary addresses to avoid duplication. Primary addresses are already included in addresses.

- a. Select **Primary Address** in the left pane.
- b. Deselect the **Include in Keyword Search** option in the right pane.

Here's a screen capture of the Advanced tab of the Configure Adaptive Search page highlighting the selection of the Primary Address in the left pane and the Primary Address field with the **Include in Keyword Search** option deselected in the right pane.



8. After making your selections, click **Publish**.

Publishing triggers an indexing process that you can monitor on the Monitor tab. Your new configuration becomes available after the indexing process completes. If the process completes with errors for some reason, contact your help desk.

## Set Up Searches on Related Object Attributes

Sometimes you want to enable the search on the attributes of a related business object. For example, you may want to find opportunities using the account owner or primary contact.



Watch video

Enabling this kind of search involves two steps:

1. Specifying which object attributes are searchable.
2. Enabling the related object for search.

For example, to make opportunities searchable by account attributes, you first make sure that the attributes you need are searchable for the Account object. You then open the Opportunity object and enable the Account related object for searching opportunities.

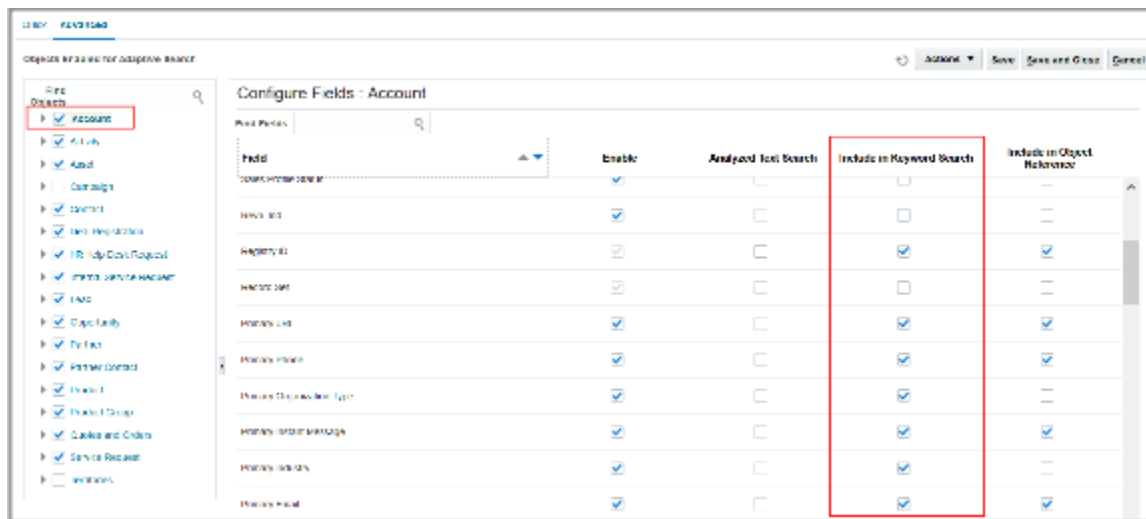
## Specify Which Object Attributes Are Searchable

1. Navigate to the Setup and Maintenance work area, and use the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Show: All Tasks
  - o Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, click **Advanced**.

3. In the left pane of the tab, select the top-level object. For example, to specify which account attributes are searchable, you select the top-level Account object.
4. In the right pane, do the following for each field you want include in the search:
  - a. Select the **Enable** option.
  - b. Select the **Include in Keyword Search** option.

All of the fields with the Include in Keyword Search option selected are included in the concatenated field and can be used in search. It is this field, with the same name as the object, that you enable for the related object.

Here's a screenshot of the Advanced tab of the Configure Adaptive Search page. It highlights the location of the **Account** object and **Include in Keyword Search** option.



## Make the Related Object Available for Search in the Object

Here's how to make the related object available for search.

1. In the left pane of the Advanced tab, open the object to reveal its related objects. For example, open the Opportunity object.
2. Select the related object. For example, select Account underneath the Opportunity object.

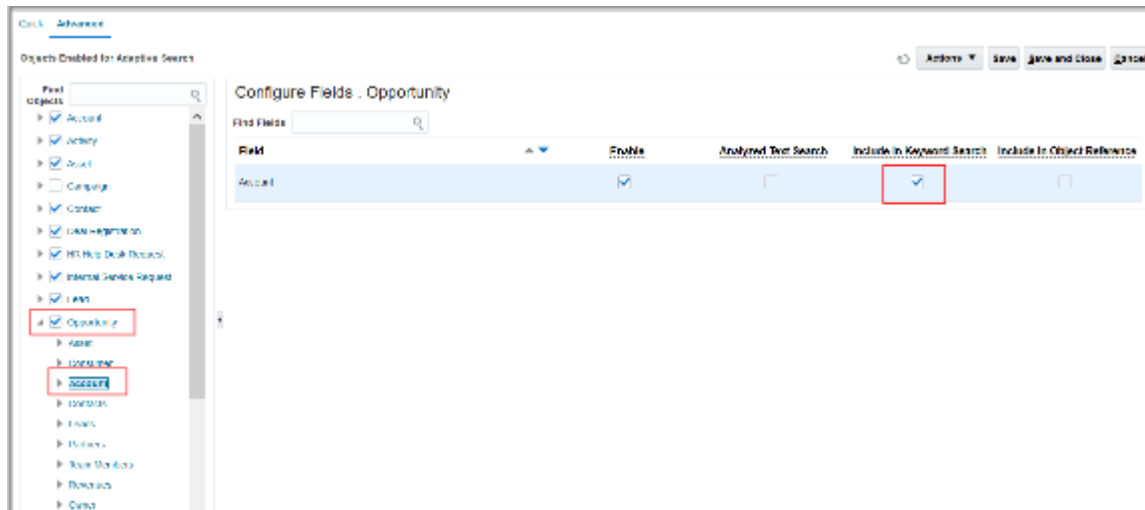
The right pane displays the concatenated field. For Account, the name of the concatenated field is Account.

3. Make sure the **Enable** option is selected for the field.

**4. Select the **Include in Keyword Search** option.**

Your action enables search on the attributes you enabled for this object.

Here's a screenshot of the Advanced tab of the Configure Adaptive Search page. It shows the selection of the Opportunity object and its Account related object in the left pane. In the right pane, the **Include in Keyword Search** option is selected for the Account field.

**5. Click **Publish**.**

Publishing triggers an indexing process that you can monitor on the Monitor tab. Your new configuration becomes available after the indexing process completes. If the process completes with errors for some reason, contact Oracle support.

## Groovy Support to Count the Number of Search Fields Enabled for Adaptive Search

Adaptive Search displays the list of records matching the saved search criteria and provides you with a record count. You can use Groovy scripts to count the total number of search fields you have enabled in Adaptive Search.

Sometimes, the amount of attributes enabled for a business object may exceed the recommended amount of 500 for each object, so you may not find the field attribute you were searching for. You can reduce the count of fields by deselecting the **Include in Object Reference** check box for child entities that you may not require. For more details, see the topic Make a Field Searchable in the UI.

### Number of Search Attributes Enabled

Here's sample of the query trigger code that will display a count for the total number of search attributes you have enabled in your Adaptive Search test environment.

**Note:** If you want to count the enabled search attributes in your active production environment, edit the script and replace **Sandbox** with **Active**.

```
SELECT
ea.ATTRIBUTE_UUID,
ltrim(sys_connect_by_path(CASE WHEN (ea.max_occurs is null and
ea.ATTRIBUTE_TYPE_NAME < > `Enum` ) THEN ea.ATTRIBUTE_NAME||'|'[]' ELSE
ea.ATTRIBUTE_NAME END,`. `),`. `) AS DOC_ATTRIBUTE_PATH,
ad.AGGREGATION_UUID,
ad.SEARCHABLE_FLAG
```

```
FROM FUSION.ZCA_ES_ATTRIBUTES ea, FUSION.ZCA_ES_ATTRIBUTE_DEFAULTS ad
WHERE ( (level > 1
AND ea.INCLUDE_IN_REFERENCE_FLAG = `Y )
OR ( level = 1)
OR (ea.RECORD_ENTITY_UUID IS NOT NULL
AND (SELECT COUNT(*)
FROM FUSION.ZCA_ES_ATTRIBUTES iea
WHERE iea.ENTITY_UUID = ea.RECORD_ENTITY_UUID
AND iea.INCLUDE_IN_REFERENCE_FLAG = `Y ) > 0 ) )
AND ea.META_MODEL_VERSION_UUID = (select meta_model_version_uuid from
FUSION.zca_es_meta_model_versions where workflow_state_type_name = `Sandbox )
AND ea.INDEXED_FLAG=`Y
AND ea.ENABLED_FLAG=`Y
AND ea.SEARCHABLE_FLAG = `Y
AND ea.ATTRIBUTE_UUID = ad.ATTRIBUTE_UUID
AND ad.SEARCHABLE_FLAG = `Y
START WITH ea.ENTITY_UUID = `d8c3af80-bc97-4ff6-a37c-cf9e8e1775c9 AND
ea.META_MODEL_VERSION_UUID = (select meta_model_version_uuid from
FUSION.zca_es_meta_model_versions where workflow_state_type_name = `Sandbox )
CONNECT BY (ea.ENTITY_UUID = PRIOR ea.RECORD_ENTITY_UUID AND
ea.META_MODEL_VERSION_UUID = (select meta_model_version_uuid from
FUSION.zca_es_meta_model_versions where workflow_state_type_name =
`Sandbox ))
AND PRIOR ea.ENABLED_FLAG=`Y AND PRIOR ad.SEARCHABLE_FLAG = `Y AND ((PRIOR
ea.ATTRIBUTE_TYPE_NAME!=`ForeignKey ) OR (PRIOR
ea.ATTRIBUTE_TYPE_NAME=`ForeignKey AND ea.INCLUDE_IN_REFERENCE_FLAG=`Y ));
```

For more information on Groovy scripting, see the related links.

### Related Topics

## Enable Merge Requests for Accounts and Contacts

The Merge Request Enabled (ZCA\_MERGE\_REQUEST) profile option specifies whether or not to allow salespeople to perform a merge request action for account and contact records in Workspace. Merging and resolving duplicate records ensures that clean customer data is available.

The predefined value is set to N, which means that salespeople can't create a merge request if they have duplicate records pointing to the same customer. You must set the profile option value to Y if you want salespeople to be able to consolidate those records into one.

Here's how to edit the Merge Request Enabled profile option.

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name ZCA\_MERGE\_REQUEST in the **Profile Option Code** field.
3. Click **Search**.
4. In the list that's returned, click the profile option code link.
5. Select Y in the **Profile Value** field to turn on the merge request feature.
6. Click **Save and Close**.



# Filter Search Setup

## Create Groupings of Values for Display in Search Filters

You can create different groupings of values for numeric, corporate currency, percent, and date fields. These groupings display when the field is used as a filter in a search.



Users get an overview of the number of records in each value grouping and they can select the groupings to narrow down their search results even more. For example, you can break down opportunity revenue into different ranges: 0 to 10,000, 10,000 to 100,000, 100,000 to 500,000, and 500,000 and up. When users use opportunity revenue as a filter, they see how many opportunities fall in each range. Selecting a range automatically displays a list of opportunities in that range.

You can also place related records displayed together as a group based on account, country, rank and so on. This provides an overview of the records in each value and you can select a group list to narrow down your search results even more. You can also perform search based on the fiscal quarters.

**Note:** By entering precise search criteria for your saved search, you can greatly decrease the number of search records returned and decrease the load time.

Before you start to create a value group field, ensure that the field is enabled for Workspace and enabled for UI display before creating its value groupings. See the Enable Fields for Display as Filters and Search Result Columns topic for details.

**Note:** You can set up to a maximum of six filters. If you try to add more than six filters, you're prompted to remove filters to meet the maximum threshold of six. Here's how to create a grouping of values for display as a filter in your search.

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area, and use:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Show: All Tasks
  - Task: Configure Adaptive Search

The Configure Adaptive Search page appears.

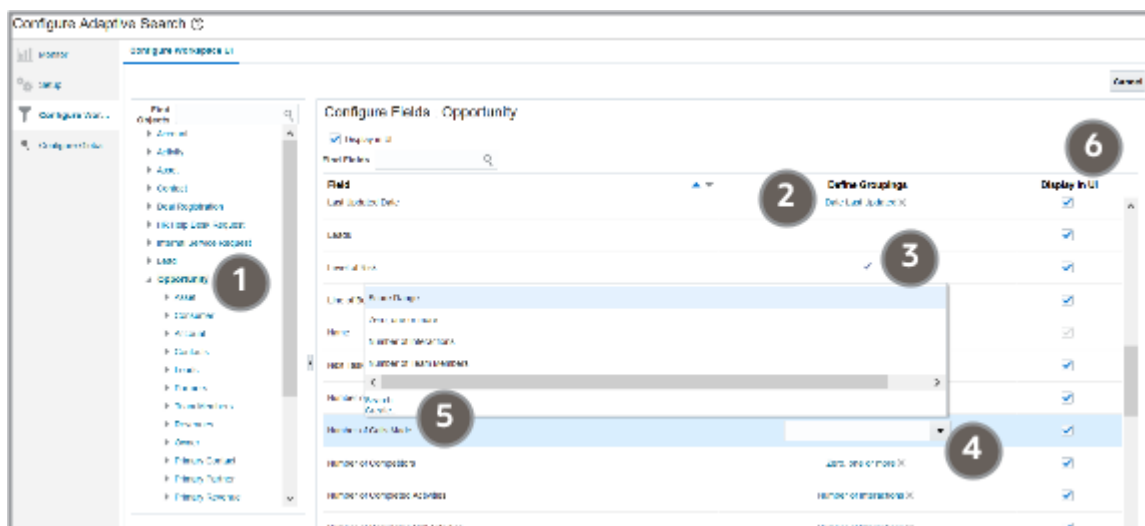
3. Click the **Configure UI** tab.
4. Select the object where you want to set up filter value groupings in the left pane of the tab. You may have to open up the object hierarchy. The fields for the object display in the Configure Fields tab on the right.

**Note:** You can create filter value groupings only for fields that display a name of an existing grouping in the Define Groupings column. The **Defined Groupings (checked)** indicator (a check mark) in this column indicates filter groupings are created automatically. You can't create your own groupings for these fields.

5. If a filter grouping supplied by Oracle already exists for the field you want to set up, then remove the filter from the field. You can't edit filter value groupings provided by Oracle.
6. If no filter value groupings exist for the field, then click **Search** (the down arrow) to display the list of existing groupings and either select an existing grouping or click the **Create** link to create a new one.

Here's a screenshot of a portion of the Configure UI page. Callouts identify the relevant features.

| Callout Number | Description                                                                                                                                                                                                                                                                   |
|----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1              | Selecting an object on the left displays its fields on the right.                                                                                                                                                                                                             |
| 2              | A name in the Define Groupings column tells you that you can create filter groupings of your own. You must remove the existing filter groupings before selecting or creating a new one. You can edit groupings by clicking the name, but not those groups provided by Oracle. |
| 3              | A check mark in the Define Groupings column indicates filter groupings are created automatically. You can't create your own groupings for these fields.                                                                                                                       |
| 4              | Clicking Search (the down arrow icon) in the Define Groupings column displays a list of existing filters. Search is only available after you remove an existing grouping for the fields.                                                                                      |
| 5              | Location of the <b>Create</b> link                                                                                                                                                                                                                                            |
| 6              | Selecting the <b>Display in UI</b> option makes the field available in the Workspace UI.                                                                                                                                                                                      |



7. If you're creating a filter for a date field, then do the this:
  - a. Enter a unique filter name and description. The filter name appears in the list of existing filters whenever you're adding a new filter.
  - b. In the Manage Date Filters region, use the **Move** buttons (arrows) to select the date ranges you want to use in the filter and change their order. You can't create additional date ranges.

The image shows a screen capture of the Create Filter page for a date field.

- c. Click **OK** when you're done.

**Note:** In Workspace, a filter Date type such as Last Week is considered to be from Monday to Sunday and displays all records from Monday to Sunday of the previous week. Selecting a filter of Last Year, for example in 2021, would return all records from January 01 2020 to December 31 2020 for the selected search object.

8. If you're creating a filter for a numeric, corporate currency, or percent field, then do this:
- Enter a unique filter name and description. The filter name appears in the list of existing filters whenever you're adding a new filter.
  - Create the filter value groupings. You can create up to 10 groupings. No gaps or overlaps are allowed between groupings. To create the groupings:

- Click **Add** (the plus icon).
- For the first grouping, you can select either the **Less than** or the **Between** operator and enter the low and high values as appropriate.

Results with the high value you enter aren't included in the filter value range. If you enter a range of 0 to 10,000 then the filter value grouping displays records between 0 and 9,999.

- Subsequent groupings copy the high value from the previous grouping as the low value for the new grouping.

The low value is inclusive. If the low value is 10,000, then the grouping displays results with 10,000.

You can use the **Between**, **Greater than and equal to** and **Equal to** operators.

This table lists the filter value groupings for a sample filter called Revenue Ranges.

| Function                 | Low Value | High Value                                                                       |
|--------------------------|-----------|----------------------------------------------------------------------------------|
| Between                  | 0         | 10,000                                                                           |
| Between                  | 10,000    | 100,000                                                                          |
| Between                  | 100,000   | 500,000                                                                          |
| Greater than or equal to | 500,000   | Not applicable. There's no high value for the Greater than or equal to function. |

| Function | Low Value | High Value |
|----------|-----------|------------|
|          |           |            |

This image shows a screen capture of the Create Filter page for the sample Revenue Ranges numeric filter.

The screenshot shows the 'Create Filter' dialog box. The 'General Information' section has 'Name' as 'Revenue Ranges' and 'Description' as '0-10K, 10K - 100K, 100K-500K, >500K'. The 'Type' is set to 'Numeric'. The 'Filter Value Groupings' section shows a table with four rows of filter ranges. The third row, 'Between 100,000 and 500,000', is highlighted with a blue border. The table has columns for 'Function', 'Low Value', and 'High Value'.

| Function                | Low Value | High Value |
|-------------------------|-----------|------------|
| Between                 | 0         | 10,000     |
| Between                 | 10,000    | 100,000    |
| Between                 | 100,000   | 500,000    |
| Great than and equal to | 500,000   |            |

c. Click **OK** when you're done.

9. Ensure that the **Display in UI** option is selected for the fields you want to enable for use as filters in the UI. The fields are also available for display as columns in the search results.

10. Click **Save and Close**.

The changes you made are reflected in the Workspace UI. No publishing is required for the filter changes.

**Note:** If your Accounting Calendar is modified, then you must click **Refresh Cache** from the Actions menu in the Setup - Advanced tab on the Configure Adaptive Search page. When complete, sign out and sign back in again to see the changes reflect in the Fiscal Year based filters in Workspace.

## Enable Fields for Display as Filters and Search Result Columns

You can specify which fields are available for selection as search filters and can be displayed as columns in search results and saved searches.

The fields you enable by selecting the **Display in UI** option from the Configure UI tab in the Configure Adaptive Search page are available for selection in the Edit Columns and Edit Filters windows.

**Note:** Before you start, make sure that the field you are setting up as a filter is enabled for Adaptive Search. See the topic *How do I make a field searchable in the UI?* for details.

1. Sign in as a setup user.
2. Navigate to the Setup and Maintenance work area, and click the **Configure Adaptive Search** task:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Configure Adaptive Search

The Configure Adaptive Search page appears.

3. Click **Configure UI**.
4. Select the object you want to set up in the left pane of the tab. You must open the hierarchy of related objects to get to some of the fields.
5. Ensure that the **Display in UI** option is selected for the fields you want enabled as filters and for display in search results.

**Note:** The default layout specifies that a minimum of four fields must be displayed for your Workspace UI configuration. Therefore, when editing Workspace UI columns and specifying fields, always ensure that you have at least four fields selected for both standard and custom objects.

6. Click **Save and Close**.

If you made your changes to a field that was previously enabled for Adaptive Search and you published the configuration after you enabled the field, then the field can be used as a filter immediately. Otherwise you must publish your configuration as described in the topic *How do I make a field searchable in the UI?*

## Enable Territory Membership Record Set Values for Workspace

You can enable the territory membership and territory membership hierarchy values that appear in the opportunity search filter record sets in the Workspace UI.

The **My territory membership** record set returns records where the signed in user is either the owner or a member of territories assigned to the opportunity. The **My territory membership hierarchy** returns records where the signed in user is either the owner or a member of a territory assigned to the opportunity, or owner or member of a territory that's ascendant to an assigned territory. These record sets are predefined but they must be enabled before your salespeople can use them in Workspace.

Here are the steps to enable the **My territory membership** and **My territory membership hierarchy** values for the opportunity search filter record sets in Workspace.

1. Navigate to the Setup and Maintenance work area, and use the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Standard Lookups
2. In the **Meaning** field, enter **Opportunity Filter Record Sets for Workspace**.
3. Click **Search**.
4. Select the lookup type you want to enable in the ORA\_MOO\_OPTY\_SRCH\_RS\_WS: Lookup Codes page.
  - Scroll to the ORA\_MYASSGMEMBTERRPTIES (My territory membership) lookup code and select **Enabled**.

- Scroll to the ORA\_MYASSGMEMBDESCTERROPTIES (My territory membership hierarchy) lookup code and select **Enabled**.

5. Click **Save and Close**.

## Lists of Prioritized Recent Items

### My Lists

Based on your use and engagement patterns with your Digital Sales and CX sales application, My Lists present the most contextually relevant records to help minimize navigation and searching.

My Lists are automatically created for you and are derived from your past and recent application touches and interactions with the following supported objects:

- Accounts
- Activities
- Contacts
- Leads
- Opportunities
- Partners
- Products,
- Product Groups

Using a predefined relevancy scoring mechanism, lists are based on near real-time user context and display the most relevant and contextual records data to users once every 10 minutes. They also help reduce the amount of navigation and clicks required to perform additional searches. For example, the My List for Accounts includes accounts ranked by the number of times a salesperson has opened each account, its contacts, and its opportunities and how recently. So, if today you open or update account information on Acme four times, but only open Pinnacle once, then Acme appears higher on the list than Pinnacle. Each list can display a maximum of 50 items. Items that haven't been touched for 30 days get automatically taken off the list.

Here are some of the factors that affect how relevancy scores influence the presentation of records for your respective My List saved searches:

- Recency: Last time you interacted with an object
- Frequency: How frequent you interact with an object
- Favorites: Records you mark as a favorite
- Urgency: When an action is expected from you such as task due tomorrow, upcoming appointment, and so on
- Related objects: Relevancy scores are boosted for related account, opportunity, or lead objects associated with overdue tasks and appointments
- Event-based updates: Updates to win probability, status, and sales stage boosts the relevancy score for opportunity records

My Lists are included along with saved searches in Digital Sales list pages and in the Sales Dashboard.

In CX Sales, My Lists are available in Workspace, in work areas powered by Adaptive Search, infolets, and in CX Sales Mobile app. For example, to display a list of your accounts in Workspace, salespeople select **Accounts > My List for Accounts**, just like any other saved search.

The list is created and maintained by two processes:

- The Generate Relevancy Feed process creates the list. By default, this process runs every 3 hours.  
**Note:** You can reduce the refresh rates of My Lists from once every 3 hours to near real-time (10 minutes refresh intervals) by setting the **Enable Near Real Time User Context Relevancy** profile option to Y.
- The Age User Context Relevancy process removes items from the list that haven't been touched by the user in the past 30 days. By default, this process runs once a day.

## Modify My List Behavior

My Lists are available automatically to salespeople as soon as they start working in the application. No setup is required. However, you can modify My List behavior in a few ways:

- Change how long untouched items are kept in the list. By default, items are kept 30 days after they're accessed last. For example, if your organization has long sales cycles, then you may want to keep items on the list for a little longer.
- Enable the Near Real-Time User Contextual Relevancy profile option.
- Change how frequently and when My Lists are refreshed to improve user experience.

### Change How Long Items Are Kept in the List

You can change the number of days untouched records are kept in the list by setting the profile option, Relevancy Aging Maximum Number of Days (ZCA\_UC\_AGING\_CYCLE). Here's how:

1. In Setup and Maintenance, open the **Manage Administrator Profile Values** task.
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. In the Manage Administrator Profile Values page, search by the profile option name **Relevancy Aging Maximum Number of Days** or code ZCA\_UC\_AGING\_CYCLE .
3. Click the profile option name link.
4. Set the profile option value to the desired number of days.
5. Save your changes.

### Enable the Near Real-Time User Contextual Relevancy Profile Option

You can enable near real-time user contextual relevancy by setting the profile option, Enable Near Real Time User Context Relevancy (ORA\_ZCA\_UC\_ENABLE\_NRT). Here's how:

1. In Setup and Maintenance, open the **Manage Administrator Profile Values** task.
  - Offering: Sales
  - Functional Area: Sales Foundation



- Task: Manage Administrator Profile Values
- 2. In the Manage Administrator Profile Values page, search by the profile option name **Enable Near Real Time User Context Relevancy** or code `ORA_ZCA_UC_ENABLE_NRT`.
- 3. Click the profile option name link.
- 4. Change the profile option value from FALSE to Y to enable near real-time user contextual relevancy.
- 5. Save your changes.

## Run the My List Processes with Different Frequencies and Schedules

You can change how often or when you run the two processes that generate the My List and remove untouched items from the list:

- **Generate Relevancy Feed**  
Generates My Lists by analyzing all records that have been updated in the last 24 hours. By default, this process runs every three hours.
- **Age User Context Relevancy Feed**  
Removes from My Lists all items that haven't been accessed in the past 30 days (the number of days set in the profile option Relevancy Aging Maximum Number of Days). By default, this process runs once a day.

See the User Context section of the Sales and B2B Service Scheduled Processes chapter of Understanding Scheduled Processes guide for details.

### Related Topics

- [Create and Edit Profile Options](#)
- [Age User Context Relevancy Feed](#)

## Additional Configurations

### Set Up Search on Personally Identifiable Information in Workspace

Workspace supports personally identifiable information (PII) attributes and includes them in search criteria and search results. The PII attributes are appropriately secured based on the READ privileges and aren't searchable (masked) if you don't have the necessary READ privilege.

Here are the PII attributes that are masked or are available in Workspace based on the different user privileges:

- `HZ_VIEW_TRADING_COMMUNITY_PERSON_SOCIAL_SECURITY_DATA`

| JgzzFiscalCode | HomePhone | MobilePhone | PrimaryPhone, ListOfPhones      | HomeAddress | PrimaryAddress, ListOfAddresses | PersonalEmail | PrimaryEmail, ListOfEmails |
|----------------|-----------|-------------|---------------------------------|-------------|---------------------------------|---------------|----------------------------|
| Don't mask     | Mask      | Mask        | Mask all home and mobile phones | Mask        | Mask all home addresses         | Mask          | Mask all personal emails   |

| JgzzFiscalCode | HomePhone | MobilePhone | PrimaryPhone, ListOfPhones | HomeAddress | PrimaryAddress ListOfAddresses | PersonalEmail | PrimaryEmail, ListOfEmails |
|----------------|-----------|-------------|----------------------------|-------------|--------------------------------|---------------|----------------------------|
|                |           |             |                            |             |                                |               |                            |

- HZ\_VIEW\_TRADING\_COMMUNITY\_PERSON\_CONTACT\_DATA

| JgzzFiscalCode | HomePhone  | MobilePhone | PrimaryPhone, ListOfPhones | HomeAddress | PrimaryAddress ListOfAddresses | PersonalEmail | PrimaryEmail, ListOfEmails |
|----------------|------------|-------------|----------------------------|-------------|--------------------------------|---------------|----------------------------|
| Mask           | Don't mask | Mask        | Mask all mobile phones     | Mask        | Mask all home addresses        | Don't mask    | Don't mask                 |

- HZ\_VIEW\_TRADING\_COMMUNITY\_PERSON\_MOBILE\_PHONE\_DATA

| JgzzFiscalCode | HomePhone | MobilePhone | PrimaryPhone, ListOfPhones | HomeAddress | PrimaryAddress ListOfAddresses | PersonalEmail | PrimaryEmail, ListOfEmails |
|----------------|-----------|-------------|----------------------------|-------------|--------------------------------|---------------|----------------------------|
| Mask           | Mask      | Don't mask  | Mask all home phones       | Mask        | Mask all home addresses        | Mask          | Mask all personal emails   |

- HZ\_VIEW\_TRADING\_COMMUNITY\_PERSON\_CONTACT\_DATA and HZ\_VIEW\_TRADING\_COMMUNITY\_PERSON\_MOBILE\_PHONE\_DATA

| JgzzFiscalCode | HomePhone  | MobilePhone | PrimaryPhone, ListOfPhones | HomeAddress | PrimaryAddress ListOfAddresses | PersonalEmail | PrimaryEmail, ListOfEmails |
|----------------|------------|-------------|----------------------------|-------------|--------------------------------|---------------|----------------------------|
| Mask           | Don't mask | Don't mask  | Don't mask                 | Mask        | Mask all home addresses        | Don't mask    | Don't mask                 |

- HZ\_VIEW\_TRADING\_COMMUNITY\_PERSON\_ADDRESS\_DATA

| JgzzFiscalCode | HomePhone | MobilePhone | PrimaryPhone, ListOfPhones      | HomeAddress | PrimaryAddress ListOfAddresses | PersonalEmail | PrimaryEmail, ListOfEmails |
|----------------|-----------|-------------|---------------------------------|-------------|--------------------------------|---------------|----------------------------|
| Mask           | Mask      | Mask        | Mask all home and mobile phones | Don't mask  | Don't mask                     | Mask          | Mask all personal emails   |

| JgzzFiscalCode | HomePhone | MobilePhone | PrimaryPhone,<br>ListOfPhones | HomeAddress | PrimaryAddress<br>ListOfAddressse | PersonalEmail | PrimaryEmail,<br>ListOfEmails |
|----------------|-----------|-------------|-------------------------------|-------------|-----------------------------------|---------------|-------------------------------|
|                |           |             |                               |             |                                   |               |                               |

- No user privilege

| JgzzFiscalCode | HomePhone | MobilePhone | PrimaryPhone,<br>ListOfPhones         | HomeAddress | PrimaryAddress<br>ListOfAddressse | PersonalEmail | PrimaryEmail,<br>ListOfEmails  |
|----------------|-----------|-------------|---------------------------------------|-------------|-----------------------------------|---------------|--------------------------------|
| Mask           | Mask      | Mask        | Mask all home<br>and mobile<br>phones | Mask        | Mask all home<br>addresses        | Mask          | Mask all<br>personal<br>emails |

#### Related Topics

- [Manage Personally Identifiable Information](#)
- [How do I assign PII privileges using security console?](#)

## About Aggregates in Adaptive Search

In previous releases, Workspace supported a set of predefined aggregated fields. Aggregated fields calculate key record metrics displayed in search results and lets you view calculations that include count, average, and sum of values across fields on a record, related objects, and parent-child objects.

**Note:** Predefined aggregated fields are no longer available for this release. As an alternative, Oracle recommends that you use Rollups functionality as search criteria for your summarized data. Rollups summarize data for an attribute of a business object and its related objects. For example, a rollup can calculate the sum of the potential revenue from the opportunities for an account hierarchy within the last 120 days. You can view rollups in the Rollups subtab on the object pages you enable for your CX sales users. See the topic [What are the steps to set up rollups?](#) from the Rollups chapter of the Implementing Sales guide for more information.

## How do I access Workspace data offline?

You can export data from Workspace for offline viewing and verification. For example, a sales manager might want to export a list of accounts to perform a more in-depth analysis of their sales team or for reporting purposes.

Only sales manager and sales administrator roles are granted the predefined security privilege ZCA\_WORKSPACE\_EXPORT to access the export data feature in Workspace.

The **Export List** button enables you download data from Workspace as a comma-separated values file. You can then use this file to view or analyze your data offline.

Click **Export List** to download all data in the result set. The result set is determined by the columns displayed in the Workspace UI. Export doesn't include data for hidden columns. It includes all the rows filtered by the current filter criteria applied.

The default number of rows to export is 2000 and the maximum limit is set at 10000 rows. You can change the default number of rows by changing the **Maximum Number of Records for Export** parameter from the Parameters tab on the Configure Adaptive Search page. See the related topic [Edit Adaptive Search Parameters](#) for more information.

When the maximum limit of rows to export is reached, a warning message is displayed prompting you to click **Continue** to export the first 2000 rows in the result. This action generates a file containing the first 2000 rows of the result set. If you don't want to export the result set, click **Cancel** to return to the Workspace UI.

The exported file contains the results set data displayed in the same column headers and in the same order as displayed in Workspace.

**Note:** You can also export personally identifiable information (PII) if you have the required access to view PII attributes in Workspace.

#### *Related Topics*

- [How do I edit Adaptive Search parameters?](#)

## Dynamic Nested Tabs

Service users with job roles such as Customer Service Representative and Customer Service Manager can keep multiple records open at the same time in nested tabs in the Workspace UI.

While this Workspace feature isn't available to the sales job roles provided by Oracle, you can create custom job roles with these privileges to enable the dynamic nested tabs:

- Open Objects in Dynamic Tabs
- Open Objects in Dynamic Tabs for FSCM
- Open Objects in Dynamic Tabs for HCM

For more information about creating job roles and assigning privileges, see the [Securing CX Sales and Fusion Service guide](#).

**Note:** If you choose to use dynamic tabs, then record-level navigation won't be possible. That means that the Previous and Next buttons on the record details page won't be available for navigating lists of records for Account, Contact, Lead, Opportunity, Activity, Campaign, Territory, and custom objects through the Workspace UI.

#### *Related Topics*

- [Enable Nested Tabs for Territories in Workspace](#)

## Enable Nested Tabs for Territories in Workspace

You can enable dynamic and nested tabs for territories in Workspace. This allows salespeople to easily find territories, as well as view and manage multiple territories at the same time.

Dynamic and nested tabs are hidden by default. When using nested tabs, Next and Previous buttons aren't available in the Edit Territory pages. The Workspace Dynamic and Nested Tabs Enabled (ZCA\_ENABLE\_WORKSPACE\_DYNAMIC\_TABS) profile option enables users to display tabs for different types of work items at the same time.

**Note:** To enable dynamic and nested tabs in Workspace, you must add the Open Objects in Dynamic Tabs (SVC\_OPEN\_OBJECTS\_IN\_DTNT\_PRIV) privilege to the Sales Administrator or equivalent administrator role.

Here's how to enable the ZCA\_ENABLE\_WORKSPACE\_DYNAMIC\_TABS profile option.

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name ZCA\_ENABLE\_WORKSPACE\_DYNAMIC\_TABS in the **Profile Option Code** field.
3. Click **Search**.
4. In the list that's returned, click the profile option code link.
5. Select Y in the **Profile Value** field to enable the dynamic and nested tab feature.
6. Click **Save and Close**.

## Enable Custom Dynamic Choice Lists (DCL) for Resource Object on Adaptive Search

You can view, search, and add filters on all dynamic choice list fields for the Resource object using Adaptive Search. You must first create a user-defined profile option, set its value to Y (Yes), and specify the Site profile level.

A dynamic choice list is a field that contains a list of values which are populated from the actual data of another object. You can select filter dynamic choice lists by using saved searches as filter criteria to return a set of search records that best suits your requirements.

Here are the steps to create the ENABLE\_CUSTOM\_RESOURCE\_DCL\_IN\_ADAPTIVESEARCH user-defined profile option.

1. Navigate to the Setup and Maintenance work area. Click the **Tasks** side panel icon and then click the **Search** link.
2. Search for and select the **Manage Profile Options** task.
3. Create a new profile option, using these details:
  - o Profile Option Code: ZCA\_ENABLE\_CUSTOM\_RESOURCE\_DCL\_IN\_ADAPTIVESEARCH
  - o Profile Display Name: ENABLE\_CUSTOM\_RESOURCE\_DCL\_IN\_ADAPTIVESEARCH (alternatively, provide a name of your choice)
  - o Application: Common Search

- Module: Search
  - Start Date: Enter today's date
4. Click **Save and Close**.
  5. In the **Profile Values** section, for the **Site** level, check the **Enabled** and **Updatable** check boxes.
  6. Click **Save**.
  7. Next, you need to set the values for the profile option. Search for and select the **Manage Administrator Profile Values** task.
  8. Search for the ZCA\_ENABLE\_CUSTOM\_RESOURCE\_DCL\_IN\_ADAPTIVESEARCH profile option you have just created.
  9. In the **Profile Values** section, navigate to the **Site** profile level, and enter the **Profile Value** as **Y**.
  10. Sign out and sign back in again.

Next, navigate to the Adaptive Search configuration and the **Resource DCL** should show up as a field in your list. You must click **Publish** to run the process after you make changes to your configuration and make **Resource DCL** available for searching.

## Workspace Extensions

### How can I add custom objects, custom child objects, and custom fields to Workspace UI?

Users with permission to extend Workspace can access a custom object and search on it from the Workspace UI, search on one or more fields within the custom object, retrieve search results, and create saved searches for the custom object.

Fields are searchable both in the Search box and in filters. Searching on top-level custom objects and their custom child objects is supported. Custom child objects of standard objects are also supported.

**Note:** Custom objects created under Enterprise Resource Planning (ERP) and Supply Chain & Manufacturing (SCM) application suites aren't supported by Adaptive Search.

Adaptive Search supports predefined relationships between the ready-to-use standard business objects. It also supports one-to-one and one-to-many custom relationships between standard and custom objects.

**Note:** Custom long texts aren't supported.

Custom fields and custom child objects must be published from the sandbox before you configure Adaptive Search to include them. You can't configure Adaptive Search inside a sandbox. Follow this standard process:

1. Create the custom fields and custom child objects using Application Composer while working in a sandbox.
2. Publish the sandbox.
3. With no sandbox open, configure the search behavior you want in Adaptive Search and publish the new configuration.

**Note:** If you have dynamic choice list fields included from a custom object to a standard object, such as an Opportunity, then the standard object attributes that you selected by setting the **Include in Object Reference** check box are displayed in the custom object list page. However, the custom object attributes won't be available in the standard object list page because dynamic choice list fields aren't supported from standard objects to custom object.

## Synchronization of Custom Objects, Custom Child Objects, and Custom Fields to Workspace

When you launch the Workspace search configuration, all custom attributes published using Application Composer and the sandbox are synchronized to the Workspace configuration UIs. It may take a little time to synchronize all custom objects, custom child objects and custom fields to the Workspace search setup. If the searchable attribute is set to true in Application Composer, all custom attributes for standard top level objects and custom objects are enabled for indexing by default. However, if the searchable attribute that you want isn't set to true, then you must explicitly enable it for indexing.

Setup is done on the Advanced setup tab. You select the business object you want to set up in the left pane of the tab, and set the object's search properties in the right pane. See the topic *How Search Action is Modified* for more information.

## Configure Deep Links for Workspace

Deep links are links that point to another page. You can embed default Workspace deep link URL patterns for the supported and custom objects to any web page as a link.

By clicking these deep links, your sales and service users can go directly to the details of the corresponding record within the context of Workspace.

### Deep Link URL Patterns

Here's an example of the standard direct URL link to for the Account business object:

```
https://<hostname>:<port>/crmUI/faces/FuseOverview?fndGlobalItemNodeId=
itemNode_workspace_workspace&fndTaskItemNodeId= ZCA_CC_INTERACTIVE_UI_CRM&fnd=%3B
entityName%253DAccount %253BsubTabName%253DOverview%253BrecordId%253D<RecordID>%253B%3B%3Bfalse%3B256%3B
%3B%3B
```

In some cases, an additional parameter, `subTabName`, is also included in the URL. For example, this sample URL syntax allows direct links to the specified subtab:

```
http://<hostname>:<port>/crmUI/faces/FuseOverview?fndGlobalItemNodeId=
itemNode_workspace_workspace&fndTaskItemNodeId=ZCA_CC_INTERACTIVE_UI_CRM&fnd=%3B
entityName%253D<EntityName>%253BsubTabName%253D<SubTabName>%253BrecordId%253D<RecordID>%253B%3B%3Bfalse
%3B256%3B%3B%3B&action=EDIT_INLINE
```

If you want the selected record to open in inline mode, just add `&action=EDIT_INLINE` to the end of the URL. For example, this sample syntax opens your record ID in inline mode:

```
http://<hostname>:<port>/crmUI/faces/FuseOverview?fndGlobalItemNodeId=
itemNode_workspace_workspace&fndTaskItemNodeId=ZCA_CC_INTERACTIVE_UI_CRM&fnd=%3B
entityName%253D<EntityName>%253BsubTabName%253D<SubTabName>%253BrecordId%253D<RecordID>%253B%3B%3Bfalse
%3B256%3B%3B%3B&action=EDIT_INLINE
```

**Note:** If you don't specify `&action=EDIT_INLINE`, records open in inline mode by default.

You can also configure deep links to open selected records in dynamic and nested tabs by adding `&action=EDIT_IN_TAB` to the end of the URL. For example, this sample syntax opens your record ID for edit in a dynamic tab:

```
http://<hostname>:<port>/crmUI/faces/FuseOverview?fndGlobalItemNodeId=
itemNode_workspace_workspace&fndTaskItemNodeId=ZCA_CC_INTERACTIVE_UI_CRM&fnd=%3B
```

```
entityName%253D<EntityName>%253BsubTabName%253D<SubTabName>%253BrecordId%253D<RecordID>%253B%3B%3Bfalse%3B256%3B%3B%3B&action=EDIT_IN_TAB
```

In the above sample syntax, you must replace the <RecordID> with the actual value from your environment. To get this value, use the this sample SQL syntax to retrieve a record ID for a service request that has an SR Number value of SR0000000002.

```
select sr_id from fusion.svc_service_requests where sr_number = 'SR0000000002'
```

**Note:** For deep links to Workspace saved searches, the <Saved\_Search\_UUID> should belong to the same entity as the <RecordID>.

For example,

```
https://<hostname>:<port>/fscmUI/faces/deepLink?objType=ZCA_WORKSPACE_REQUEST&objKey=savedSearchUuid%3D<Saved_Search_UUID>%3BentityName%3D<EntityName>%3BrecordId%3D<RecordID>%3BsubTabName%3D<SubTabName>&action=EDIT_INLINE
```

A URL example to a default action to a Workspace List page is as follows:

```
https://<hostname>:<port>/fscmUI/faces/deepLink?objType=ZCA_WORKSPACE_REQUEST&action=NONE
```

Here's an example deep link URL to a default action for a saved search List page:

```
https://<hostname>:<port>/fscmUI/faces/deepLink?objType=ZCA_WORKSPACE_REQUESTobjKey=savedSearchUuid%3D<Saved_Search_UUID>&action=NONE
```

## Workspace Deep Link Configuration for Supported Business Objects

For each of the supported business objects, the table lists:

- The URL pattern syntax
- Whether or not the URL pattern supports a subtab name for the specific object

**Tip:** Copy the first part of the URL, `https://<hostname>:<port>/`, from your instance's actual home page.

| Business Object | URL Pattern                                                                                                                                                                                                                                                                                                                                               | Supported Subtabs                                                                                                                                                                                                                                                        |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account         | <pre>https://&lt;hostname&gt;:&lt;port&gt;/<br/>crmUI/faces/FuseOverview?<br/>fndGlobalItemNodeId=itemNode_<br/>workspace_<br/>workspace&amp;fndTaskItemNodeId=<br/>ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=<br/>%3BentityName%253DAccount<br/>%253BsubTabName%253DOverview<br/>%253BrecordId%253D&lt;RecordID&gt;%253B%3B<br/>%3B%3Bfalse%3B256%3B%3B%3B</pre> | <ul style="list-style-type: none"><li>• Overview</li><li>• Profile</li><li>• Sales Account Team</li><li>• Contacts</li><li>• Assets</li><li>• Opportunities</li><li>• Quotes</li><li>• Leads</li><li>• Relationships</li><li>• Recommendations</li><li>• Notes</li></ul> |



| Business Object | URL Pattern                                                                                                                                                                                                                                                                                                                                           | Supported Subtabs                                                                                                                                                                                                                                                               |
|-----------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity        | <code>https://&lt;hostname&gt;:&lt;port&gt;/<br/>crmUI/faces/FuseOverview?<br/>fndGlobalItemId=itemNode_<br/>workspace_<br/>workspace&amp;fndTaskItemId=<br/>ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=<br/>%3BentityName<br/>%253DActivity%253BrecordId<br/>%253D&lt;RecordID&gt;%253B%3B%3Bfalse<br/>%3B256%3B%3B%3B</code>                                 | None                                                                                                                                                                                                                                                                            |
| Asset           | <code>https://&lt;hostname&gt;:&lt;port&gt;/<br/>crmUI/faces/FuseOverview?<br/>fndGlobalItemId=itemNode_<br/>workspace_<br/>workspace&amp;fndTaskItemId=<br/>ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=<br/>%3BentityName<br/>%253DAsset%253BrecordId<br/>%253D&lt;RecordID&gt;%253B%3B%3Bfalse<br/>%3B256%3B%3B%3B</code>                                    | None                                                                                                                                                                                                                                                                            |
| Campaign        | <code>http://&lt;hostname&gt;:&lt;port&gt;/<br/>crmUI/faces/FuseOverview?<br/>fndGlobalItemId=itemNode_<br/>workspace_<br/>workspace&amp;fndTaskItemId=ZCA_CC_<br/>INTERACTIVE_UI_CRM&amp;fnd=%3BentityName<br/>%253DCampaign%253BrecordId<br/>%253D&lt;RecordID&gt;%253B%3B%3Bfalse<br/>%3B25</code>                                                 | None                                                                                                                                                                                                                                                                            |
| Contact         | <code>https://&lt;hostname&gt;:&lt;port&gt;/<br/>crmUI/faces/FuseOverview?<br/>fndGlobalItemId=itemNode_<br/>workspace_<br/>workspace&amp;fndTaskItemId=<br/>ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=<br/>%3BentityName<br/>%253DContact%253BsubTabName<br/>%253DOverview%253BrecordId<br/>%253D&lt;RecordID&gt;%253B%3B%3Bfalse<br/>%3B256%3B%3B%3B</code> | <ul style="list-style-type: none"> <li>• Overview</li> <li>• Profile</li> <li>• Team</li> <li>• Opportunities</li> <li>• Leads</li> <li>• Assets</li> <li>• Relationships</li> <li>• Recommendations</li> <li>• Notes</li> <li>• Activities</li> <li>• Conversations</li> </ul> |
| Custom Object   | <code>http://&lt;hostname&gt;:&lt;port&gt;/<br/>crmUI/faces/FuseOverview?<br/>fndGlobalItemId=itemNode_<br/>workspace_<br/>workspace&amp;fndTaskItemId=<br/>ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=<br/>%3BentityName<br/>%253D&lt;XXXX&gt;%253BsubTabName<br/>%253DSUMMARY%253BrecordId</code>                                                            | None                                                                                                                                                                                                                                                                            |

| Business Object   | URL Pattern                                                                                                                                                                                                                                                                                                       | Supported Subtabs                                                                                                                                                                                                                                                                                                  |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | <pre>%253D&lt;RecordID&gt;%253B%3B%3Bfalse%3B2%2056%3B%3B%3B</pre> <p>Replace XXXX with the custom object's API name</p>                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                    |
| Deal Registration | <pre>http://&lt;hostname&gt;:&lt;port&gt;/crmUI/faces/FuseOverview?&amp;fndGlobalItemNodeId=itemNode_workspace_workspace&amp;fndTaskItemNodeId=ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=%3BentityName%253DDealRegistration%253BrecordId%253D&lt;RecordID&gt;%253B%3B%3Bfalse%3B25</pre>                                  | None                                                                                                                                                                                                                                                                                                               |
| Lead              | <pre>https://&lt;hostname&gt;:&lt;port&gt;/crmUI/faces/FuseOverview?&amp;fndGlobalItemNodeId=itemNode_workspace_workspace&amp;fndTaskItemNodeId=ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=%3BentityName%253DLead%253BsubTabName%253DSUMMARY%253BrecordId%253D&lt;RecordID&gt;%253B%3B%3Bfalse%3B256%3B%3B%3B</pre>        | <ul style="list-style-type: none"> <li>• Summary</li> <li>• Contacts</li> <li>• Qualifications</li> <li>• Sales Team</li> <li>• Activities</li> <li>• Responses</li> <li>• Notes</li> <li>• Opportunities</li> <li>• Conversations</li> <li>• Analytics_1</li> <li>• Analytics_2</li> <li>• Analytics_3</li> </ul> |
| Opportunity       | <pre>https://&lt;hostname&gt;:&lt;port&gt;/crmUI/faces/FuseOverview?&amp;fndGlobalItemNodeId=itemNode_workspace_workspace&amp;fndTaskItemNodeId=ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=%3BentityName%253DOpportunity%253BsubTabName%253DSummary%253BrecordId%253D&lt;RecordID&gt;%253B%3B%3Bfalse%3B256%3B%3B%3B</pre> | <ul style="list-style-type: none"> <li>• Summary</li> <li>• Quotes</li> <li>• Contacts</li> <li>• Opportunity Team</li> <li>• Opportunity Partner</li> <li>• Activities</li> <li>• Notes</li> <li>• Assessments</li> <li>• Leads</li> <li>• Conversations</li> </ul>                                               |
| Partner           | <pre>https://&lt;hostname&gt;:&lt;port&gt;/crmUI/faces/FuseOverview?&amp;fndGlobalItemNodeId=itemNode_workspace_workspace&amp;fndTaskItemNodeId=ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=%3BentityName</pre>                                                                                                             | <ul style="list-style-type: none"> <li>• Overview</li> <li>• Profile</li> <li>• Partner Account Team</li> <li>• Opportunities</li> <li>• Contacts</li> </ul>                                                                                                                                                       |

| Business Object   | URL Pattern                                                                                                                                                                                                                                                                                                           | Supported Subtabs                                                                                                                                                                                                                                                                                                                                                |
|-------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | <code>%253DPartner%253BrecordId%253D&lt;RecordID&gt;%253B%3B%3B%3Bfalse%3B256%3B%3B%3B</code>                                                                                                                                                                                                                         | <ul style="list-style-type: none"> <li>Activities</li> <li>Enrollments</li> <li>Notes</li> <li>Deals</li> <li>Leads</li> <li>Conversations</li> <li>Service Requests</li> <li>Business Plans</li> <li>Assets</li> <li>Assessments</li> </ul>                                                                                                                     |
| Partner Contacts  | <code>https://&lt;hostname&gt;:&lt;port&gt;/crmUI/faces/FuseOverview?&amp;fndGlobalItemNodeId=itemNode_workspace_workspace&amp;fndTaskItemNodeId=ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=%3BentityName%253DPartnerContact%253BrecordId%253D&lt;RecordID&gt;%253B%3B%3B%3Bfalse%3B256%3B%3B%3B</code>                        | None                                                                                                                                                                                                                                                                                                                                                             |
| Quotes and Orders | <code>https://&lt;hostname&gt;:&lt;port&gt;/crmUI/faces/FuseOverview?&amp;fndGlobalItemNodeId=itemNode_workspace_workspace_workspace&amp;fndTaskItemNodeId=ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=%3BentityName%253DSalesOrderHeader%253BrecordId%253D&lt;RecordID&gt;%253B%3B%3B%3Bfalse%3B256%3B%3B%3B</code>            | None                                                                                                                                                                                                                                                                                                                                                             |
| Service Requests  | <code>https://&lt;hostname&gt;:&lt;port&gt;/crmUI/faces/FuseOverview?&amp;fndGlobalItemNodeId=itemNode_workspace_workspace_workspace_workspace&amp;fndTaskItemNodeId=ZCA_CC_INTERACTIVE_UI_CRM&amp;fnd=%3BentityName%253DCRMServiceRequest%253BrecordId%253D&lt;RecordID&gt;%253B%3B%3B%3Bfalse%3B256%3B%3B%3B</code> | <ul style="list-style-type: none"> <li>Summary (Default)</li> <li>Messages</li> <li>Interaction History</li> <li>Contacts</li> <li>Team</li> <li>Activities</li> <li>Actions and Plans</li> <li>Social</li> <li>Linked Articles</li> <li>Milestone Details</li> <li>Part Details</li> <li>Work Orders</li> <li>Audit History</li> <li>Connected Asset</li> </ul> |

| Business Object | URL Pattern                                                                                                                                                                                                                                                                                               | Supported Subtabs |
|-----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------|
| Territory       | <code>http://&lt;hostname&gt;:&lt;port&gt;/<br/>crmUI/faces/FuseOverview?<br/>fndGlobalItemId=itemNode_<br/>workspace_<br/>workspace&amp;fndTaskItemId=ZCA_CC_<br/>INTERACTIVE_UI_CRM&amp;fnd=%3BentityName<br/>%253DTerritory%253BrecordId<br/>%253D&lt;RecordID&gt;%253B%3B%3B%3Bfalse<br/>%3B25</code> | None              |

## Manage Workspace Smart Actions

You can manage predefined Workspace actions, such as Create an Appointment, Create a Task, and Create an Opportunity, using the Smart Actions administration tool in Application Composer.

Smart actions are actions that are specifically mapped to a client application, such as Workspace, and displayed to users only when specific conditions are met.

You can control which actions are available to Workspace for display at runtime and set the order in which actions are displayed to users. For example, you can use the tool to:

- Enable or remove an action by selecting or clearing the **Enabled** check box.
- Change the runtime display sequence of actions by clicking **Reorder**. For each set of rows within an object category, drag and drop table rows until you achieve the desired row order.

Here's how.

1. Create a unified sandbox and navigate to the Smart Actions administration tool in Application Composer, under Common Setup.
2. Using the **Actions** search box, look for the action that you want to enable, hide, reorder, modify and so on.
3. If you make changes to predefined actions be sure to publish the sandbox, sign out of the application, and sign back in.
4. Verify your changes in Workspace.

### Related Topics

- [Extend Lead-Related Actions for Workspace](#)
- [Overview of Smart Actions](#)

## Adaptive Search Troubleshooting

### Why is my Adaptive Search publish process taking time to complete?

The Publish process publishes the Adaptive Search configuration you set up in the Quick Setup and Advanced Setup UIs. You must click Publish to run the process each time you make changes on the Setup tab. Your changes become effective when the process completes.

The variations in the time it takes for the successful completion of the publish process is mainly due to the volume of data, the number of objects enabled, and the number of attributes selected for each object.

For example, if you publish more attributes and more objects, then it takes more time to complete the publish and indexing process. You can improve the performance by removing any attributes that you don't want to be indexed. You can also monitor the progress of the publish process. Your configuration is live when the process completes successfully.

**Note:** The Publish process should be completed before running the Periodic refresh process.

### Can I modify or translate saved searches using the User Interface Text tool?

No. You can't use the User Interface Text tool to modify or translate predefined Workspace saved searches. However, you can select Manage Saved Searches to create a copy of the saved search and rename it to suit your business requirements.

If you translate the text, ensure you use the current language of the assigned users of the saved search.

### How can I display contact information in the Workspace on a Service Request where no Account exists?

Primary Contact is considered a Contact if an Account exist for a Service Request. If an account doesn't exist for a service request, then the Primary Contact is considered as a Consumer.

To display the contact information in the Workspace on a service request where no Account exists, you must expose Consumer fields in the Edit Columns panel of your search results.

The fields to expose are Consumer: Name, Consumer: Primary Address, and Consumer: Primary Phone. You must make sure these fields are enabled for Workspace and enabled for UI display before making them available on your service request search results page. See the Enable Fields for Display as Filters and Search Result Columns topic for details.

You can then add which columns to display and in what order on the Service Request page by clicking the Edit Column (pencil icon on the far right of the Workspace UI). See the topic [Change Columns Displayed in Search Results](#) for more information.

#### Related Topics

- [Enable Fields for Display as Filters and Search Result Columns](#)
- [Change Columns Displayed in Search Results](#)

## How can I defer replicating records during reindexing?

You can configure how Adaptive Search indexes custom search records using the Advanced subtab from the Parameters tab available in the Adaptive Search setup page. For example, for custom objects, you might want to defer re-indexing of previously created records when running a partial publish indexing process.

**Note:** You must have the ZCA\_ADAPTIVE\_SEARCH\_EDIT\_PARAMS\_PRIV privilege to view and access the **Advanced** parameters of Adaptive Search. Once you are assigned this privilege, you can also view other parameters such as

You can choose to change current and default advanced parameter values if you have the required privilege. Here's how to edit the **Defer Replica Creation During Reindexing** Adaptive Search parameters for your custom business object.

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Configure Adaptive Search
3. On the **Configure Adaptive Search** page, click the **Parameters > Advanced** tab.
4. Highlight the **Defer Replica Creation During Reindexing** that you want to change and click **Edit**. This warning is displayed.

You're about to change parameters that control how Adaptive Search works. Changes should only be carried out by search setup experts. Do you want to continue?

5. Click **Yes**.
6. In the **Current Value** field, change the value from No (default value) to Yes and click **Save and Close**.

The next time you perform a partial publish, only a reindexing of the custom object occurs and takes less time to complete.

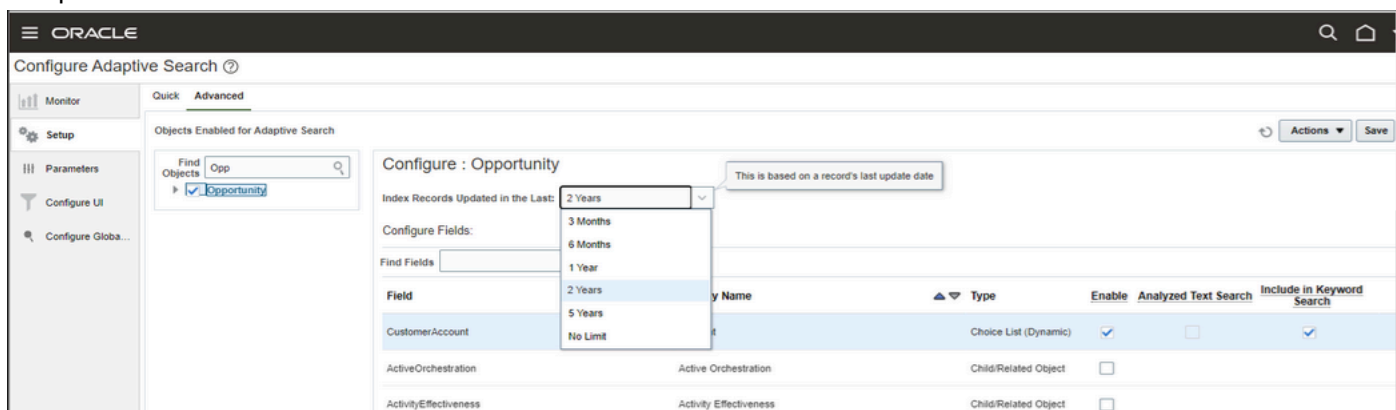
## How do I specify the duration to keep indexing records in Adaptive Search?

You can change the maximum time to keep indexing records in Adaptive Search by editing the **Index Records Updated in the Last** parameter from the **Configure Adaptive Search** task. You must have a custom role with the

ZCA\_ADAPTIVE\_SEARCH\_EDIT\_PARAMS\_PRIV privilege to view and access the Advanced setup parameters of Adaptive Search.

You can only choose to change current and default advanced parameter values if you have the required privileges for your business objects. Here's how to edit the **Index Records Updated in the Last** parameter for your business objects.

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Configure Adaptive Search
3. On the **Configure Adaptive Search** page, click the **Setup > Advanced** tab.
4. In the **Find Objects** filed, search for the object you want, for example, Opportunity as shown in the following sample screenshot.



5. From the **Index Records Updated in the Last** drop-down list, select the duration that you want to keep indexing records in Adaptive Search. You can select from the following:
  - o No limit
  - o 1 Year
  - o 2 Years
  - o 5 Years
  - o 3 Months
  - o 6 Months

**Note:** The duration you select is based on a record's last update date.

6. Click **Save** and this will trigger a full publish.
7. Verify your changes after the full publish completes.

## Why am I seeing records I can't access from my Workspace list?

Sometimes your workspace list might include records that you can see but can't drill down for more details. If this happens, its more than likely the record indexing hasn't fully completed or you may need to run a full Publish indexing process from the Monitor UI tab of the Configure Adaptive Search page.

While records you create and update in the UI are automatically indexed and made searchable within seconds, imported records or records updated by background processes aren't available for search until the process completes.

You must click Publish to run the indexing process each time you:

- Make changes on the Setup tab.
- Perform a production to test (P2T) environment refresh

## What security configuration changes does Workspace support?

Workspace supports standard, predefined job roles, custom job roles, and standard, predefined data security predicates. Workspace doesn't support custom data security predicates.

If your deployment uses custom data security predicates that impact data used by Workspace, you can either remove these custom predicates and replace them with standard, predefined data security predicates or adopt the Access Groups feature. See the Access Groups chapter in the Securing CX Sales and Fusion Service guide for more information.

## Can I modify a deep link to navigate to a specific activity from Workspace?

Yes. You can open a specific activity based on the activity ID from the Accounts page in Workspace using a deep link. For example, this sample URL syntax allows direct links to the Activities subtab from the Account:

```
https://<hostname>:<port>/crmUI/faces/FuseOverview?  
fndGlobalItemId=itemNode_workspace_workspace&fndTaskItemId  
=ZCA_CC_INTERACTIVE_UI_CRM&fnd=%3BentityName%253DAccount%253BsubTabName%253DActivities%253BrecordId  
%253D@{1}%253B%3B%3B%3Bfalse%3B256%3B%3B%3B
```

If you want to open a specific activity based on the activity ID, you replace the <RecordId> with the actual value of the <ActivityId>. However, you must first use the CAST function as follows:

```
CAST("Activity"."Activity Id" AS NUMERIC)
```

This converts the ID from a text data expression to a numeric value so that you can use the numeric value to navigate to the specific activity you want.

## FAQs for Adaptive Search and Workspace

### Frequently Asked Questions (FAQs) for Adaptive Search and Workspace

This section contains some frequently asked questions (FAQs) when setting up and maintaining Adaptive Search and Workspace functionality. Scroll or search to find answers to common questions.



## How can I specify which Adaptive Search objects to display in the Workspace UI?

You can selectively hide or show which Adaptive Search-enabled, top-level objects to expose in the Workspace UI. This feature provides access to an object through the Adaptive Search REST APIs, without making the object available to salespeople in Workspace.

For example, your salespeople might want to use an object solely from their mobile device and no longer want to view it from the Workspace UI. To allow this, you can navigate to the **Configure UI** tab in the Configure Adaptive Search setup task and deselect the **Display in UI** check box for that object.

## How can I view and assign a default saved search for a role?

To view and assign a default saved search for a role, you must fulfill all of the following conditions:

- Have the ZCA\_MANAGE\_INTERACTIVE\_LISTS\_SAVED\_SEARCH privilege so that you can view the Set Defaults tab
- Permission to view the object underlying the saved search to be assigned (for example, to assign an account default saved search, you must have permission to view the account)

**Note:** The search results returned may differ for each user as it depends on the role each user has.

## How can I display product revenue details for my opportunity?

Workspace and work areas powered by Adaptive Search stores revenue details of the products in the Revenues field.

An opportunity can have more than one product, therefore revenues aren't displayed in the UI. If you want to view a list of opportunities having one specific product, you can add a filter on the **Revenues** field to search for corresponding records.

When you create an opportunity, a primary revenue record is automatically created. The primary revenue record is independent of products added to an opportunity and is always associated with the opportunity even if no products are added to the opportunity. The primary revenue record displays as a summary line in the UI but no product related information such as item name or description values are displayed.

## What does the fuzziness level for fuzzy searches mean?

The percent sign (%) is the character used for fuzzy searches. The number of the % indicates how many characters in the search term will be ignored by the Adaptive search engine when it runs the query.

The position of the % indicates the number of characters from the beginning of the term that must match exactly with words in the result set. The following search strings illustrate how this character is used in Workspace:

- **app%ly** indicates that a matching word must begin with "app", and differ from "apply" by only 1 character.
- **a%pply** indicates that a matching word must begin with "a", and differ from "apply" by only 2 characters.

The default fuzziness level is set as 1 character. See the topic [Edit Adaptive Search Parameters](#) for information.

#### Related Topics

- [How do I edit Adaptive Search parameters?](#)

## How do I determine what fields are available for mass update?

As part of your Adaptive Search setup, you can tailor the list of fields available for mass update for each of your enabled objects.

From the **Configure UI** page, select the object and highlight the fields you want to have enabled or removed for the mass update feature and select or deselect the **Enable for Mass Update** check box.

## Global Search

### Overview of Global Search Setup

In update 21A, Oracle switched to using Adaptive Search technology for global search. You must complete the Adaptive Search setup described in the [Adaptive Search and Workspace](#) chapter before configuring global search.

If you see the global search box at the top of the page and you configured Adaptive Search, the new global search works without additional setup. However, you may still want to make some of the configuration changes outlined here.

| Step | Description                                                                                                                                                                                                                                                                                           | Navigation                                                                                                                               | Where to Get More Details                                                                  |
|------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| 1    | Check to see if the global search box appears at the top of the page. If it doesn't, you can display it by setting the profile Global Search Enabled to Yes.                                                                                                                                          | <b>Setup and Maintenance &gt; Sales &gt; Sales Foundation &gt; Manage Administrator Profile Values</b>                                   | See the topic: <a href="#">Display the Global Search Box in the UI</a> .                   |
| 2    | You can restrict the number of objects that can be searched using global search and specify which fields display for each record in the search results. By default, all of the objects you enabled in Adaptive Search are automatically searchable from the global search box at the top of the page. | <b>Setup and Maintenance &gt; Sales &gt; Sales Foundation &gt; All Tasks &gt; Configure Adaptive Search &gt; Configure Global Search</b> | See the topic: <a href="#">Configure Global Search Scope and Display of Search Results</a> |

| Step | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Navigation                                                                                                                           | Where to Get More Details                                                                                             |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| 3    | <p>Optionally, you can change the way the global search UI appears to salespeople by creating a custom configuration. For example, you can change which suggestions display when you click in the search box and which objects get displayed in search results by default.</p> <p>If you're an existing customer and you created a custom configuration in the past, your configuration still works even if you created it before the switch to Adaptive Search.</p> | <b>Setup and Maintenance &gt; Sales &gt; Sales Foundation &gt; All Tasks &gt; Manage Global Search Configurations</b>                | See the topics: <ul style="list-style-type: none"><li>Global Search UI</li><li>Configure Global Search UIs</li></ul>  |
| 4    | <p>You can make additional fields searchable using global search by setting the <b>Include in Keyword Search</b> option.</p> <p><b>Note:</b> Because they're Personal Identifiable Information (PII), you can't make contact email addresses and phone numbers available for search using global search.</p>                                                                                                                                                         | <b>Setup and Maintenance &gt; Sales &gt; Sales Foundation &gt; All Tasks &gt; Configure Adaptive Search &gt; Setup &gt; Advanced</b> | See the topic: "Make a Field Searchable in Workspace and Global Search" in the Adaptive Search and Workspace chapter. |

#### Related Topics

- How do I make a field searchable in the UI?

## Display the Global Search Box in the UI

You can control who sees the global search box by setting the profile option Global Search Enabled (FUSION\_APPS\_SEARCH\_ENABLED). You can set this profile at the site and user levels.

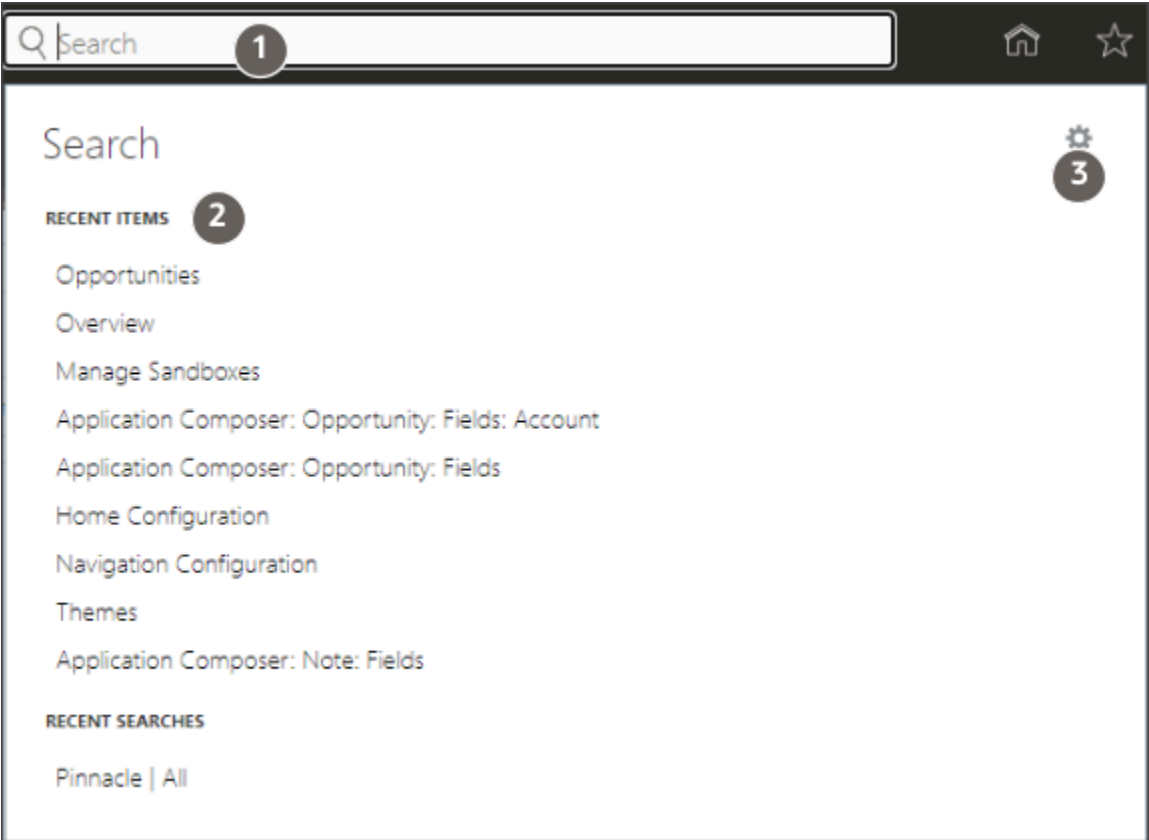
- In Setup and Maintenance, open the task **Manage Administrator Profile Values**:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
- In the Manage Administrator Profile Values page, search for the system profile option by entering **FUSION\_APPS\_SEARCH\_ENABLED** in the **Profile Option Code** field.
- To enable the search box for everyone, in the Profile Values section, select **Yes** from the **Profile Value** list at the Site level.
- You can prevent individual users from seeing the search box by setting the profile to **No** at the user level. Just click **New**, enter the user name, and select **No**.
- Click **Save and Close**.

6. You must sign out and sign in again to see the global search box at the top of the page.

## Global Search UI

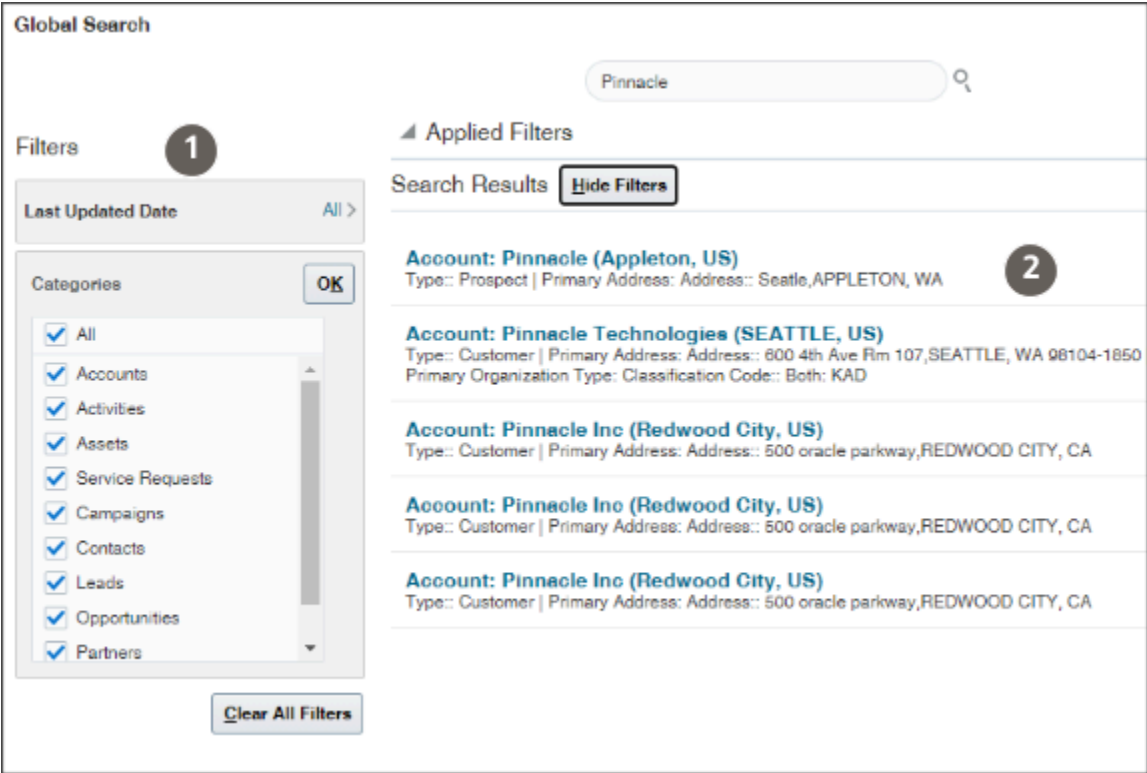
Global Search is the search box at the top of the page in the CX Sales UIs. This feature isn't available in Digital Sales. Here's a summary how global search works and how you can configure it.

| How It Works                                                                                                                                                                                                                                                                                                | What You Can Change                                                                                                                                                                                                                                                |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| When salespeople click in the global search box (callout 1), the application suggests recent search terms, recent pages you visited, and other recent items. The items are organized in suggestions groups (callout 2). For example, under Recent Items, the application suggests recent pages you visited. | <ul style="list-style-type: none"> <li>Change the "Search" prompt in the global search box.</li> <li>Specify which suggestion groups get displayed for users by default. For example, you may want to hide Recent Items and show Recent Searches first.</li> </ul> |
| Salespeople can specify which suggestion categories they want to see and which categories of results are available in the search results, by clicking <b>Personalize</b> (callout 3), the application suggests recent items they worked on recently.                                                        | <ul style="list-style-type: none"> <li>Specify which suggestion groups are available for use. For example, instead of hiding Recent Items by default, you may want to remove it from use entirely so users can no longer display the category.</li> </ul>          |
| Salespeople enter keywords in the search box (callout 1) and press <b>Return</b> to search across different objects.                                                                                                                                                                                        | <ul style="list-style-type: none"> <li>You can specify which objects are available for global search and how the results are displayed. See the topic <a href="#">Configure Global Search Scope and Display of Search Results</a></li> </ul>                       |



Here's how the results get displayed after you enter your search term and press **Enter**.

| How It Works                                                                                                           | What You Can Change                                                                                                                                                                                                                                            |
|------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The results of the search show the objects that are enabled for global search during setup.                            | <ul style="list-style-type: none"><li>You specify which objects are available for global search and how the results are displayed. See the topic Configure Global Search Scope and Display of Search Results</li></ul>                                         |
| Salespeople click <b>Show Filters</b> , and select those objects they want to see in their search results (callout 1). | <ul style="list-style-type: none"><li>The objects you selected for use in global search, show up as the available filters here.</li><li>You can specify which objects are selected by default.</li></ul>                                                       |
| Clicking on the first line of each search result opens the record for editing.                                         | <ul style="list-style-type: none"><li>By default, users drill down on the record name, but you can specify a different field as the title.</li><li>You can also specify which fields display in the two lines below the title in each search result.</li></ul> |



Salespeople can personalize their global searches by clicking **Personalize**. See the topic [Configure Global Search and Result Uls](#) to learn how to make changes in the default behavior.

| How It Works                                                                                                          | What You Can Change                                                                                                                                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Salespeople can specify which objects are included in search results and in which order.                              | <ul style="list-style-type: none"><li>You can specify which objects are available for selection and which are enabled by default.</li><li>You can disable personalization of search categories.</li></ul>           |
| Salespeople can specify which autosuggest groups show up and in which order when they click in the global search box. | <ul style="list-style-type: none"><li>You can specify which autosuggest groups are available for display and which are enabled by default.</li><li>You can disable personalization of autosuggest groups.</li></ul> |

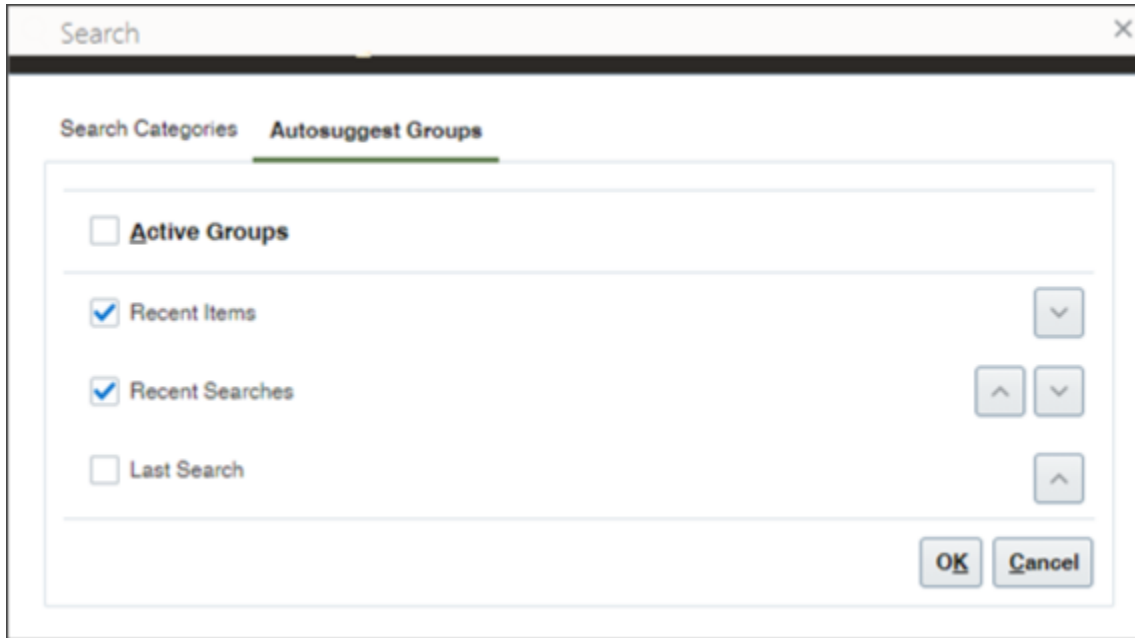
Here's the Search Categories tab salespeople can use to select which objects (categories) are included in search results. Changing the order of results isn't supported.

The screenshot shows a 'Search' dialog box with a close button (X) in the top right corner. Inside the dialog, there are two tabs: 'Search Categories' (which is selected and underlined) and 'Autosuggest Groups'. Below the tabs, there is a section titled 'Active Categories' with a checked checkbox. A list of categories follows, each with a checked checkbox and a set of navigation buttons to its right:

- Accounts: one down arrow button (v)
- Activities: up arrow (^) and down arrow (v) buttons
- Assets: up arrow (^) and down arrow (v) buttons
- Service Requests: up arrow (^) and down arrow (v) buttons
- Campaigns: up arrow (^) and down arrow (v) buttons
- Contacts: up arrow (^) and down arrow (v) buttons
- Leads: up arrow (^) and down arrow (v) buttons
- Opportunities: up arrow (^) and down arrow (v) buttons
- Partners: up arrow (^) and down arrow (v) buttons
- Partner Contacts: one up arrow (^) button

At the bottom right of the dialog, there are 'OK' and 'Cancel' buttons.

Salespeople can control which Autosuggest Groups tab makes it possible to control the suggestions you get when you first click in the global search.



#### Related Topics

- [Configure Global Search UIs](#)

## Configure Global Search Scope and Display of Search Results

You can specify which of the objects you enabled for Adaptive Search are searchable in Global Search and how the search results are displayed.

Each search result, includes:

- A title that provides the link that users click to drill down into the record. By default, the name of the record is the title, but you can choose a different field.
- Two lines displaying fields you specify

Here is a screenshot showing the results of an account search:



**Global Search** ✕

✕ 

▲ **Applied Filters** Clear All Filters

Categories Accounts ✕

**Search Results** Show Filters 10 Results ↑↓

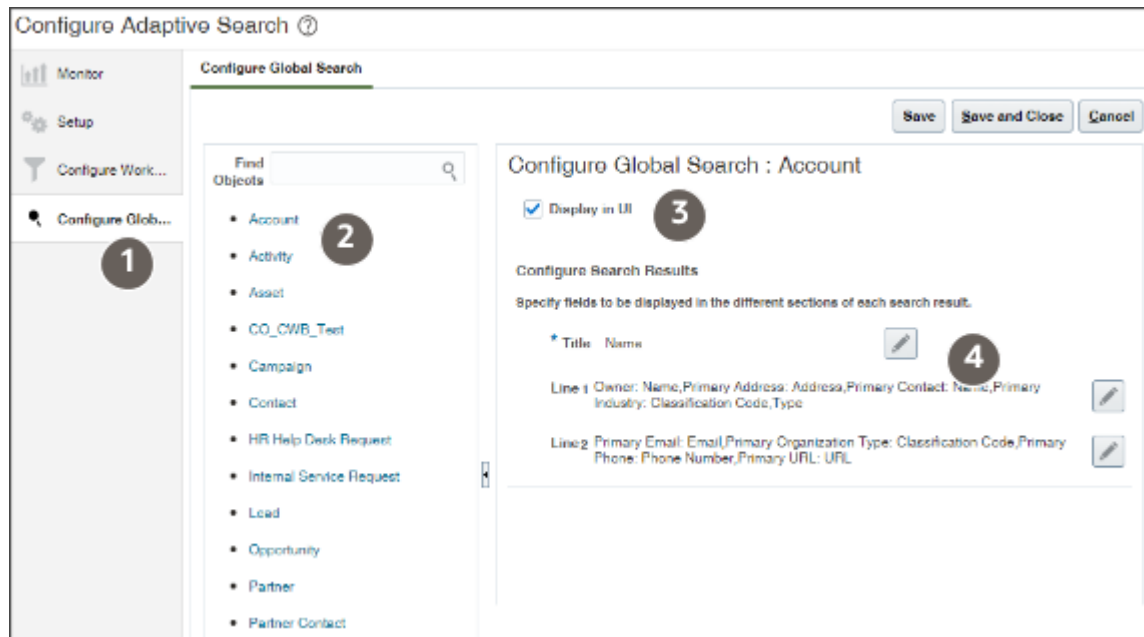
**Account: Pinnacle (Appleton, US)**  
Type:: Prospect | Primary Address: Address:: Seattle,APPLETON, WA | Owner: Name:: Dan Foreman

**Account: Pinnacle Technologies (SEATTLE, US)**  
Type:: Customer | Primary Address: Address:: 600 4th Ave Rm 107,SEATTLE, WA 98104-1850KING | Primary Industry: Classification Code:: Retail | Owner: Name:: Gabrielle Lee

**Account: Pinnacle Inc (Redwood City, US)**  
Type:: Customer | Primary Address: Address:: 500 oracle parkway,REDWOOD CITY, CA | Owner: Name:: autoapisladmin svc  
Primary Contact: Name:: John Smith

1. In the Setup and Maintenance work area, open the **Configure Adaptive Search** task:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Show: All Tasks
  - Task: Configure Adaptive Search

2. In the Configure Adaptive Search page, click the **Configure Global Search** tab in the left-side of the page (callout 1 in the screenshot).



1. Configure each object you enabled for Adaptive Search:
  - a. Click the object link in the **Objects** column on the left (callout 2).
  - b. You can prevent users from using Global Search to search the object by deselecting the **Display in UI** option (callout 3). By default, users can search all objects you enabled for Adaptive Search.
  - c. By default, users click on the record name link in the search results to drill into a record, but you can select a different field. To change the drill-down link, click **Title** (the pencil icon, callout 4) and select the alternate field.
  - d. Click the **Line 1** edit button and select the fields you want to display in the first line under the title.
  - e. Click the **Line 2** edit button and select the fields you want to display in the second line.
  - f. Click **Save**.
2. When you complete configuring all the objects, click **Save and Close**.

## Configure Global Search UIs

Optionally, you can configure the behavior of global search UIs. For example, you can specify which suggestions display automatically when users click in the search field and which objects display in search results. You can create different configurations for different application pages.

**Tip:** If you already made a copy of the new OSC Default Global Search Configuration, then you can edit that copy and make your changes there. You don't need to create a second copy.

## Duplicate the Default Configuration Provided by Oracle

You can't make changes to the Global Search configuration provided by Oracle. You must copy the Oracle configuration and edit that copy instead. If you already created a copy, you can skip this step.

1. Click **Navigator > My Enterprise > Setup and Maintenance**.
2. In the Setup and Maintenance work area, open the **Manage Global Search Configurations** task:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Show: All Tasks
  - Task: Manage Global Search Configurations
3. On the Manage Global Search Configurations page, select the configuration with the **OSC** short name and **Default Global Search Configuration** name.
4. Click **Duplicate** (the document icon).
5. In the **Short Name** field, enter an alphanumeric code with uppercase letters and no spaces.
6. Enter a name for your configuration in **Display Name**.
7. Select CRM as the product family and module.
8. Leave the **Default** option deselected for now. You select this option as a last step.
9. Click **Save and Close**.
10. Open the Manage Global Search Configurations page again.
11. Click the name link for the configuration you created.
12. Use the tabs to define your configuration:
  - **Autosuggest**: Determine what's available to users in the global search autosuggest, as well as how autosuggest looks and behaves.
  - **Search Field**: Control the **Search** field in the global header and in the search results dialog box.
  - **Search Results**: Specify if salespeople can personalize the filters used in their searches
  - **Pages**: Specify where you want your configuration to apply.

## Define Which Groups of Suggestions Users See

1. While editing the global search configuration you created, click the Autosuggest tab.

The screenshot shows the 'Autosuggest' configuration page. At the top, there are tabs: 'Autosuggest', 'Search Field', 'Search Results', and 'Pages'. The 'Autosuggest' tab is selected. Below the tabs, there is a 'Synonyms' section with a checkbox 'Enable personalization of search groups' (callout 1). Below that is the 'Suggestion Groups' section, which contains two tables: 'Available Groups' and 'Selected Groups'. The 'Available Groups' table lists various suggestion groups with checkboxes to enable them. The 'Selected Groups' table lists the groups currently selected, with columns for 'Enabled', 'Displayed by Default', and 'Group Name'. Callout 2 points to the 'Saved Searches' group in the 'Selected Groups' table. Below the tables are buttons for 'Refresh' and 'Manage Suggestion Groups'. Below the 'Suggestion Groups' section is the 'Appearance' section, which includes 'Show Suggestion Group Headings' (callout 3), 'Show Icons', and a 'No Suggestions Message' field. Below that is the 'Behavior' section, which includes 'Show Top Suggestions', 'Minimum Characters for Autosuggest' (callout 4), and 'Maximum Number of Suggestions'.

2. Skip setup of **Synonyms** as they don't apply to Sales.
3. Keep the **Enable personalization of search groups** option selected unless you want to prevent users from personalizing suggestion groups.
4. In the **Suggestion Groups** section:
  - o Move the **Saved Searches** group (callout 2), and any other unwanted suggestion groups, to the **Available Groups** column. This action removes them from use. Saved searches can't be used with Global Search.
  - o You can remove a suggestion group from being displayed by default by setting **Enabled** to **No**. Users can still enable the group when they personalized their global search.
  - o You can change the order the suggestion groups are presented to users.
  - o You can change the suggestion group headings.
    - i. Click **Manage Suggestion Groups**.
    - ii. Duplicate an existing group and edit your copy.
    - iii. Click **Refresh**.
    - iv. Swap your copy for the original.
5. You can turn the suggestion group headings off in the Appearance section (callout 3).

6. You can change suggestion behavior (callout 4):

- **Show Top Suggestions:** Enable this option to display suggestions in autosuggest as soon as the user clicks in the search field, even without entering a search term. For example, the last few pages the user opened would appear as suggestions in the Recent Items group.
- **Minimum Characters for Autosuggest:** Enter the number of characters that users must enter in the search field before matching suggestions appear in autosuggest.
- **Maximum Number of Suggestions:** Enter the maximum number of suggestions to be displayed across all suggestion groups. This total is distributed as equally as possible among the groups.

## Configure the Global Search Field

Here are the main configurations for the global search box field:

- You can change the minimum and maximum number of characters required for search.
- You can specify a different word to appear in the Global Search box instead of "Search".

The screenshot shows the configuration for the Global Search Field. The 'Search Field' tab is active. The settings include:

- Minimum Number of Characters:** 2
- Maximum Number of Characters:** 100
- Automatically Clear Field Value after Search:** On
- Label:** (empty text field)
- Placeholder:** Search
- Show 'Search for' link:** ☒

## Configure How Salespeople Can Use Filters

- In the **Saved Search and Recent Search** section, you can disable the display of recent searches by deselecting **Enable recent searches**. Saved searches aren't available in global search.
- In the **Filters** section:
  - Keep **Enable personalization of search categories** selected unless you want to prevent users from specifying which objects they see in the search results. You determine the objects that show up as filters in global search while setting up Adaptive Search (see the topic Configure Global Search Scope and Display of Search Results).
  - **Enable clear all filters:** Allow users to clear all filters by clicking the **Clear All Filters** button in search results.
  - **Show applied filters:** Show all the filters that have been applied
- The **Search Categories** section and the rest of the sections on this tab don't apply to CX Sales.

## Specify the Sales Pages Where Your Configuration Applies and Complete the Configuration

Entering the application pages is a one-time setup. If you're editing a configuration you created, then you don't need to reenter the page codes again. You can skip this step.

1. Enter codes (view IDs) for the applications or pages where you want your configuration to apply. Here are the entries for CX Sales:

| View Type   | View ID              |
|-------------|----------------------|
| Application | CRMPerformanceApp%   |
| Application | ORA_CRM_SERVICESAPP% |
| Application | ORA_CRM_UIAPP%       |
| Application | ORA_SERVICEAPP%      |
| Application | SalesApp%            |
| Application | ORA_FSCM_UIAPP%      |

You can obtain other codes in Setup and Maintenance, using the Manage Taxonomy Hierarchy task as described in the linked topic: [Specify the Pages or Applications That a Global Search Configuration Applies To](#).

2. At the top of the page, select the **Default** option.
3. Click **Save and Close**.
4. Clear your browser cache and navigate to any of the sales pages to test your configuration.

# 12 Workspace Infolets

## About Workspace Infolets

New actionable infolets, called Workspace infolets, provide salespeople with many of the features they use in Workspace, such as quick actions and configurable filters.

For example, from within the My Accounts Workspace infolet, salespeople can take notes, log calls, schedule appointments, and even create opportunities for a specific account in the list. They can also create new accounts directly from the infolet. Salespeople can personalize the information in each infolet and can specify their own filter criteria and decide how they want the infolet information to display.

So that salespeople can start using Workspace infolets, you must set the Enable Workspace Infolets (ZCA\_ENABLE\_ADAPTIVE\_INFOLETS) profile option value to Yes. See the topic, Edit the Enable Workspace Infolets Profile Option, for more information. In addition, it's also a prerequisite to have Workspace enabled. See the Adaptive Search Setup section in the Adaptive Search and Workspace chapter in this guide for information about how to set up Adaptive Search and Workspace.

You can enable the Sales Infolets page, if it's not enabled by default. Ensure that you have access to the job roles for which you're enabling the page.

Oracle provides these predefined Workspace infolets:

- My Accounts
- My Appointments
- My Contacts
- My Leads
- My Opportunities
- My Tasks

After you switch to Workspace infolets, Oracle provides four additional Workspace infolet templates that you can extend and configure based on your business requirements. For more information, see the topic, Set Up Additional Workspace Infolets.

## Edit the Enable Workspace Infolets Profile Option

The Enable Workspace Infolets (ZCA\_ENABLE\_ADAPTIVE\_INFOLETS) profile option specifies whether Workspace-search-based actionable infolets or existing sales actionable infolets are available to salespeople from the sales application pages.

The predefined value is No, which means that salespeople can only see the existing sales actionable infolets in the Sales Infolets tab, available in the Analytics section on the News Feed home page. Oracle recommends that you use the Workspace infolets instead, since they're based on the Adaptive Search and Workspace framework.

Here's how to edit the Enable Workspace Infolets profile option to switch to the Workspace-search-based actionable infolets.

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name ZCA\_ENABLE\_ADAPTIVE\_INFOLETS in the **Profile Option Code** field.
3. Click **Search**.
4. In the list that's returned, click the profile option code link.
5. Select Yes in the **Profile Value** field to switch to the Workspace infolets.
6. Click **Save and Close**.

## Display Workspace Infolets

You can specify which infolet tabs appear in the Analytics section and in which order. For example, the Sales Infolets page displays key sales information in containers called infolets.

Some infolets provide you with an overview, but others make it possible for you to take direct action, such as actionable infolets and Workspace infolets. These infolets summarize key sales data and let you take immediate action on the tasks presented.

Oracle recommends you use Workspace infolets, which are based on the Adaptive Search and Workspace framework. In addition, these Workspace infolets:

- Provide a set of predefined configuration templates that let users with the required access quickly create their own custom infolets based on the Workspace user experience
- Enable salespeople to personalize which information to display on their own Workspace infolet pages, such as including features they frequently use in Workspace
- Let you display different Workspace infolets for different job roles in the organizations

To start using Workspace infolets, you must set the Enable Workspace Infolets (ZCA\_ENABLE\_ADAPTIVE\_INFOLETS) profile option value to Yes. In addition, it's also a prerequisite to have Workspace enabled. See the Adaptive Search Setup section in the Adaptive Search and Workspace chapter in this guide for information about how to set up Adaptive Search and Workspace.

Oracle provides these predefined Workspace infolets:

- My Accounts
- My Appointments
- My Contacts
- My Leads
- My Opportunities
- My Tasks

The Sales Infolets page is enabled by default. Ensure that you have access to the job roles for which you're enabling the page. For more information, see the Enable and Configure Workspace Infolets section of the Getting Started with Your Sales Implementation guide.



To understand how to configure the springboard and home page to fit your unique business needs, see the Oracle Applications Cloud Configuring Applications Using Application Composer guide on Oracle Help Center.

**Note:** Workspace infolets are secured through privileges. For more information, see the Securing CX Sales and Fusion Service guide and the Security Reference for CX Sales and Fusion Service guide on Oracle Help Center.

## Choose Which Workspace Infolets to Display

Here's how to select the predefined individual Workspace infolets.

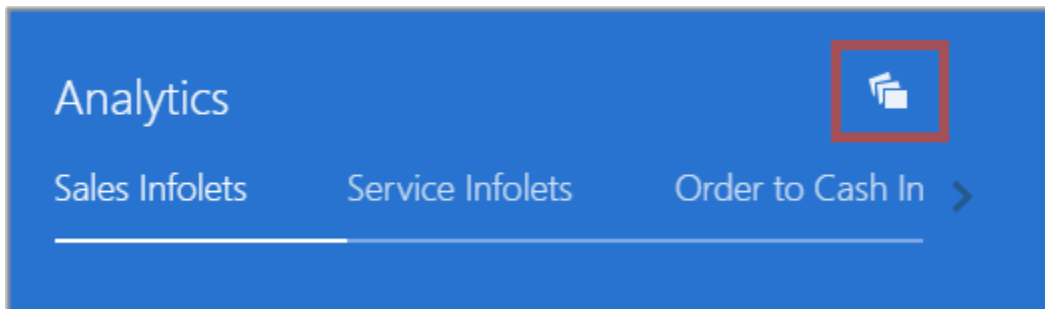
1. With a sandbox open, click **Home** to return to the home page.
2. In the sandbox, select **Page Composer** from the **Tools** menu.

The Page Composer toolbar appears underneath the sandbox toolbar.

3. Scroll down to the **Analytics** section where the Workspace infolets are located.

The section displays the same infolet configuration that users with the selected job role see when they open the home page. The section displays both Workspace infolets and Oracle Business Intelligence infolets.

4. If you don't see the Workspace infolet you're looking for, or want to hide some of the existing infolets on the page, do this:
  - a. Click **Infolet Repository** (the file icon on the top right side of the Analytics heading highlighted in the screenshot).



- b. Select or deselect the individual infolets to display or hide them.
- c. You drag infolets around to change their order. Alternatively, click **Infolet Repository**, scroll down to the bottom of the list, and select **Reorder Infolets**.
- d. When you're done configuring the Workspace infolets, you need to click **Close** in the Page Composer toolbar to save your changes.
- e. Publish the sandbox by clicking its name and selecting **Publish**.
- f. You can test your configuration by signing in as a user with the appropriate job role. Remember that each user can personalize their own Workspace infolet views and that their personalization overrides the default view you created.

You can also change the order of the infolets by dragging them around.

## Modify Workspace Infolets

As an administrator, you can specify or remove existing predefined fields (attributes) or select additional user-defined attributes to display on Workspace infolets for salespeople.

You can apply different setting for salespeople by role or at the site level. Salespeople can improve their sales performance tasks by prioritizing tasks and using filters.

### Before You Modify the Infolets

Before modifying the predefined Workspace infolets, do the following:

- Understand the typical workflows for working with runtime application changes.
- Ensure that you can modify the infolet by checking if the Edit Pages menu item is available in the Settings and Actions menu available from the global header region. If the menu item isn't available, then you can't modify the page.

**Note:** Workspace infolets are secured through the "View Sales Homepage pagination dot one" and the "View Sales Representative Dashboard" privileges. Ensure users have these two privileges. For more information, see the Securing CX Sales and Fusion Service guide and the Security Reference for CX Sales and Fusion Service guide on Oracle Help Center.

- Confirm that your privilege is sufficient to modify the page.
- Create or activate an existing sandbox.  
When configuring Workspace infolets, make sure the sandbox has only the Page Composer tool selected. If you want to make changes in a context layer other than the default Site layer, you must create a separate sandbox and use only Page Composer in it. You can then change the context layer from Site to other layers. For example, to create or edit infolets for a user with a specific job role, you must select the Job Role context layer.

**CAUTION:** If you delete an infolet, you can't easily retrieve it. Contact your help desk if you accidentally delete one.

### Edit the Infolets for Different Job Roles

Workspace infolets are available to predefined roles. However, you can set the availability of Workspace infolets so that they become visible to other user-defined roles by editing the visibility settings for the infolet. For example, you can create different Workspace infolet configurations for the whole enterprise, or for specific job roles. If you're configuring different configurations of Workspace infolets for different job roles, then you must create separate sandboxes for each job role.

For more information, see the topic, Create and Enter a Sandbox with Page Composer as Your Tool in the Enable and Configure Workspace Infolets section in the Configure the Navigator and Home Page chapter of the Getting Started with Your Sales Implementation guide.

### Specify Which Workspace Infolet Attributes to Display

You can select and replace any of the predefined attributes shown on the Workspace infolets with alternate available attributes of your choice.

**Note:** If you want to hide one of the predefined attributes, enter a blank value, in which case nothing is displayed in the corresponding drop-down list position you select.

This table shows the attributes that you can modify and represents the order as they appear on the UI.

| Workspace Infolet | Attributes                                                                                                                      |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------|
| My Accounts       | <ul style="list-style-type: none"><li>Name</li><li>Primary Contact</li><li>Primary Address</li></ul>                            |
| My Appointments   | <ul style="list-style-type: none"><li>Activity Time</li><li>Subject</li><li>Primary Address</li></ul>                           |
| My Contacts       | <ul style="list-style-type: none"><li>Name</li><li>Primary Account</li><li>Primary Phone Number</li><li>Primary Email</li></ul> |
| My Leads          | <ul style="list-style-type: none"><li>Rank</li><li>Lead Name</li></ul>                                                          |
| My Opportunities  | <ul style="list-style-type: none"><li>Sales Stage</li><li>Name</li><li>Close Date</li><li>Amount</li></ul>                      |
| My Tasks          | <ul style="list-style-type: none"><li>Subject</li><li>Activity Type</li><li>Due Date</li></ul>                                  |

Here's how to modify the attributes of a Workspace infolet:

1. With Page Composer and your sandbox open, scroll down to the Analytics section, Sales Infolets tab, where the Workspace infolets are located.
2. From Settings and Actions in the global header region, select **Edit Pages**. The Edit Pages window appears.
3. Select one of the following:
  - **Site** to make your changes available to everyone.
  - **Job Role** to target a specific job role you select from the list.
4. From the Workspace infolet that you want to modify, for example, My Accounts, select **Configure** from the **Actions** menu.
5. In the Manage Infolet window, select the **Layout** tab (callout 1 in the screenshot).
6. Select the saved search you want to configure (callout 2).

7. Add the fields you want to display (callout 3). Be sure to always display the **Name** field: it provides the link that salespeople use to drill down into the record.
8. Set and adjust the two-column table widths in percentage terms by sliding your mouse along the Column Width ruler.
9. Keep the **Show quick actions** option selected to display the actions for each record (callout 5).

Manage Infolet

Save and Close

Cancel

Filters

Layout1

Saved SearchAccounts : My Accounts2

Display Fields

2 Columns

Name3Primary Contact

Primary Address

Column Width 50 %

450

50 %

Show quick actions5

10. Make the changes that you want to the attribute and select another attribute to edit, if required.
- Tip:

A default attribute is used for drilling down to the detail page of the object. For example, for Opportunity, the **Name** is the default value. If dynamic choice list fields are added to Workspace infolets, then the drill-down capability is automatically enabled.

This table shows the field names and associated attribute names that you can select for drill-down for each of the Workspace infolets:

| Workspace Infolet | Default Value | Attribute               |
|-------------------|---------------|-------------------------|
| My Accounts       | Name          | Primary Contact         |
|                   |               | Primary Address         |
| My Appointments   | Subject       | Primary Contact Address |

| Workspace Infolet | Default Value              | Attribute                           |
|-------------------|----------------------------|-------------------------------------|
| My Contacts       | Name                       | Primary Account                     |
| My Opportunities  | Name                       | Amount<br>Close Date<br>Sales Stage |
| My Leads          | Lead Name                  | Rank                                |
| My Tasks          | Subject<br>Primary Contact | Type<br>Due Date                    |

11. Click **Save and Close** when you have finished making the changes.
12. Verify your changes and publish the sandbox.

## Specify Filters

Selecting available Workspace saved-search filters allows for a more dynamic, effective, and targeted view of the records that salespeople want to update and take immediate action on. All of the Workspace saved searches associated with the specified object appear as filters for your Workspace infolet. Filtering reduces the number of searches required to view any outstanding items that might require attention. You can choose to select or hide predefined filters that you want to make available on Workspace infolets.

You can select filters to include or not include, rearrange filters, and add custom filters. You can multiselect and double-click filters in the Available list to move them to the Selected list. You must select at least one filter for the Workspace infolet filter list.

To access a different set of data, create a new saved search in Workspace and then expose the relevant saved search in the Workspace Infolets UI.

**Note:** Predefined saved searches are available for selection. However, any custom saved searches that you create must include **Record Set** values selected for either any records that you own or for records where you're on the team. In addition, when saving your saved search, you must select the **Run Automatically** check box to run the search automatically when your saved search is loaded.

This table shows the filters that you can select for each of the Workspace infolets.

| Workspace Infolet | Filter                                                                                                              |
|-------------------|---------------------------------------------------------------------------------------------------------------------|
| My Accounts       | <ul style="list-style-type: none"><li>• All Accounts</li><li>• My Accounts</li><li>• My List for Accounts</li></ul> |

| Workspace Infolet | Filter                                                                                                                                                                                            |
|-------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                   | <ul style="list-style-type: none"><li>• My Team Accounts</li></ul>                                                                                                                                |
| My Appointments   | <ul style="list-style-type: none"><li>• My Appointments</li></ul>                                                                                                                                 |
| My Contacts       | <ul style="list-style-type: none"><li>• My Contacts</li><li>• My List for Contacts</li></ul>                                                                                                      |
| My Leads          | <ul style="list-style-type: none"><li>• My Open Leads</li><li>• My List for Leads</li><li>• My Team's Open Leads</li><li>• Open Leads Where I am on the Team</li></ul>                            |
| My Opportunities  | <ul style="list-style-type: none"><li>• My Open Opportunities</li><li>• My List for Opportunities</li><li>• My Team's Opportunities</li><li>• Open Opportunities Where I am on the Team</li></ul> |
| My Tasks          | <ul style="list-style-type: none"><li>• My Open Tasks</li><li>• My Overdue Tasks</li><li>• My Team's Tasks</li></ul>                                                                              |

Here's how to specify the filters on a Workspace infolet:

1. Ensure that you're working in an active sandbox.
2. Navigate to the Workspace infolet that you want to modify.
3. From the Workspace infolet that you want to specify, for example, My Opportunities, select **Configure** from the **Actions** menu.  
The My Opportunities Workspace infolet page is displayed with the predefined saved search filters selected.
4. From the **Filters** tab, select the filters that you want to display.
5. Click **Save and Close** when you have finished making the changes.
6. Verify your changes and publish the sandbox.

## Set Up Additional Workspace Infolets

Workspace infolets consist of six preconfigured infolets that display key sales information for accounts, contacts, leads, opportunities, tasks, and appointments, and four blank infolets with the title Additional Actionable Infolet. After you enable them, Workspace infolets replace the existing actionable infolets.

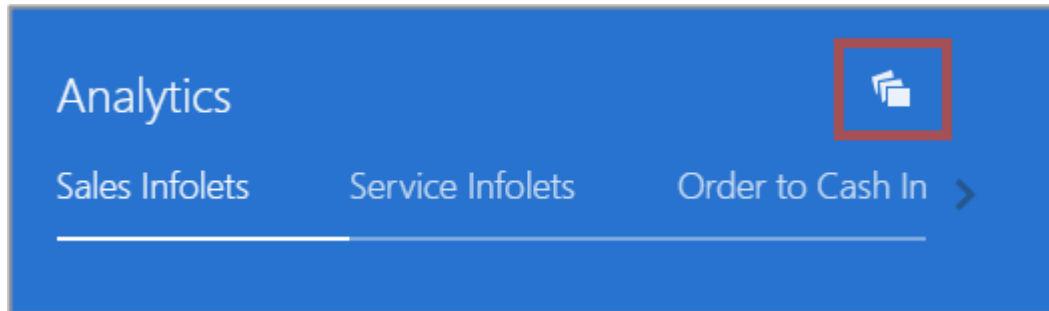
### Select the Additional Workspace Infolets from the Infolet Repository

The **Additional Actionable Infolet** is one of four predefined blank infolets that you can use to create custom Workspace-based infolets from scratch. For example, if some of your salespeople rely heavily on partners for their sales activities, then you can configure the blank infolets to use Partner-based task flows and saved search filters. Similarly,

service users might place the Service-based task flow as a higher priority item and their administrators can tailor one of the additional actionable infolets specifically to their needs. These additional custom Workspace infolets can also be used by sales users on the Analytics section of the home page or dashboard dot.

Here's how to select the additional Workspace infolet templates that you can configure to suit your business requirements.

1. Scroll down to the **Analytics** section where the Workspace infolets are located.
2. Click **Infolet Repository** (the file icon on the top right side of the Analytics heading, highlighted in the screenshot).



3. Select or deselect the individual additional infolets to display or hide them.
4. You drag infolets to change their order. Alternatively, click **Infolet Repository**, scroll down to the bottom of the list, and select **Reorder Infolets**.

## Configure Additional Workspace Infolets

After you select an additional actionable infolet, you configure and personalize it to suit your business needs. For example, you can edit the title of your infolet, move, hide, or show specific Workspace infolets on your infolet page, and refresh your record data. The smart actions match the smart actions available from the Workspace UI, and the quick action denoted by the ellipsis icon opens an inline window where you perform your action without having to navigate outside the infolet. You can also create a new record for your specific Workspace Infolet by clicking the Create icon (plus sign) from the top right corner of the infolet.

Here's how to configure the filters of a Workspace infolet:

1. Ensure that you're working in an active sandbox.
2. Navigate to the **Additional Actionable Infolet** you want to include to your custom infolet template.
3. Select **Configure** from the **Actions** menu.  
The Manage Infolet screen is displayed.
4. From the **Filters** tab, the predefined filters are listed in the Available section of the screen.
5. Select filters to include or not include, rearrange filters, and add custom filters.  
You can multiselect and double-click filters in the Available list to move them to the Selected list. You need to select at least one filter from the Workspace infolet filter list.
6. Click **Save and Close** when you have finished selecting your filters.
7. From the **Layout** tab, go to **Saved Search** drop-down list and select the filter you want.
8. Select the attributes that you want to edit from the respective filter you selected from the Saved Search drop-down list.
9. Set and adjust the two-column table widths in percentage terms by sliding your mouse along the Column Width ruler.
10. Select **Show quick actions** to display the quick actions that you can perform at the record level for this saved search filter.

11. Click the **Actions** icon on the top right corner of the actionable infolet, and select **Edit Title and Views** to edit the infolet title.
12. Click **Save and Close**.
13. Verify your changes and publish the sandbox.

For more information, see the topic, [Configure Workspace Infolets](#).

## Manage Custom Actions for Workspace Infolets

Workspace infolets quick actions match the configured smart actions already created in Workspace. You can manage predefined Workspace actions, such as Create an Appointment, Create a Task, and Create an Opportunity, using the Smart Actions administration tool in Application Composer.

Smart actions are actions that are specifically mapped to a client application, such as Workspace, and displayed to users only when specific conditions are met. For example, you can also control which actions are available to Workspace for display at runtime. Here are the high-level steps:

1. Create a sandbox and navigate to the Smart Actions administration tool in Application Composer, under Common Setup.
2. Using the **Actions** search box, look for the action that you want to reorder, modify or add.
3. If you make changes to predefined actions, be sure to publish the sandbox, sign out of the application, and sign back in.
4. Verify your changes in Workspace.

### Related Topics

- [Overview of Smart Actions](#)



# 13 Legacy Work Area Search

## Work Area Search

### Overview of Work Area Search Setup

The topics in this section help you maintain and optimize searches in work areas for individual objects and to create saved searches for the sales organization.

**Note:** The topics in this section apply only to work areas that use the legacy CRM search. If you're a new customer or if you opt in to use the new work areas that are based on Workspace, you must set up Adaptive Search and the saved searches for Workspace instead.

### Enable Work Area Search

If you ran Setup Assistant as described in the *Implementing Sales* guide. If you didn't use Setup Assistant, or if you need to index search objects at intervals that are different from the default intervals implemented by Oracle, then complete the setup tasks outlined in the following table to enable the two searches.

| Step | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                           | Setup                                                                                                                                                                                                                                                                                                                                           | Where to Get More Information                      |
|------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------|
| 1    | <p>Schedule the following processes to run periodically:</p> <ul style="list-style-type: none"><li>• Synchronize CRM Search Indexes</li></ul> <p>Oracle recommends that you set this process, which builds the search index, to run every five minutes.</p> <ul style="list-style-type: none"><li>• Optimize CRM Search Indexes</li></ul> <p>This process prevents index fragmentation and degradation in search performance. Oracle recommends that you run this process weekly.</p> | <p>You can schedule both process to run at the recommended intervals with the click of a button using the Schedule Work Area Search Process quick setup task for the Sales Foundation functional area.</p> <p>If you require different intervals, then you must separately schedule these processes from the Scheduled Processes work area.</p> | See the topic: Schedule Work Area Search Processes |
| 2    | <p>Configure the saved searches (lists) your sales organization uses in the different work areas. You can create saved searches for your organization as a whole or for select job roles and hide those supplied by Oracle. You can also specify which saved search appears by default when a</p>                                                                                                                                                                                     | <p>In a sandbox with Page Composer, configure the saved search configuration you need for each of the work areas. You must publish the sandbox to make the saved search changes available to others.</p>                                                                                                                                        | See the topic Configure Work Area Lists            |

| Step | Description                                                                                                                                                                                                            | Setup | Where to Get More Information |
|------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------|-------------------------------|
|      | salesperson navigates to a specific work area.<br><br>The saved searches you configure for work areas are specific to the individual work areas. They can't be used in Workspace or as filters in actionable infolets. |       |                               |

#### Related Topics

- [How do I run the processes that index the legacy CRM Search?](#)

## Enable Alphabetic Sort in Work Area Lists

You can enable automatic alphabetic sort of records displayed in legacy Account, Contact, and Household work area lists by setting these system profile options to Yes. Because sort may affect application performance with large data sets, it's disabled by default.

**Note:** This topic applies only to work areas that use the legacy CRM search. If you're a new customer or if you opt in to use the new work areas that are based on Workspace, you must set up Adaptive Search and the saved searches for Workspace instead.

| Profile Option Name | Profile Option Code   |
|---------------------|-----------------------|
| Sort Account Name   | ZCA_LM_ACCOUNT_SORT   |
| Sort Contact Name   | ZCA_LM_CONTACT_SORT   |
| Sort Household Name | ZCA_LM_HOUSEHOLD_SORT |

## Setting the Profile Options

To enable automatic alphabetic sort of the lists in the Account, Contact, and Household work areas, set the system profile option as follows:

1. Navigate to the Setup and Maintenance work area, and use the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. Search for one of the profile options by name or by code.

The application displays the profile option information.

3. In the Profile Values section, select **Yes** from the **Profile Value** list.
4. Click **Save and Close**.

## How do I run the processes that index the legacy CRM Search?

You must run two processes to enable work area searches for those work areas that use the legacy CRM search.

**Note:** This topic applies only to work areas that use the legacy CRM search. For Sales in the Redwood user experience and most work areas, including Workspace, you must set up Adaptive Search instead.

| Process Name                   | Description                                                                                                                                    | Recommended Interval |
|--------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|----------------------|
| Synchronize CRM Search Indexes | Creates and maintains the search index. Oracle recommends that you set this process, which builds the search index, to run every five minutes. | Every five minutes   |
| Optimize CRM Search Indexes    | Optimizes the index. (The index can get fragmented over time.)                                                                                 | Weekly               |

These two processes automatically run at the recommended intervals when you use either of the following

- Setup Assistant  
Setup Assistant runs these processes without any prompting from you.
- Schedule Work Area Search Processes page

This Quick Setup page is available in the Sales offering, Sales Foundation functional area. You run both processes by clicking **Submit**.

Here's how to run the processes at different intervals:

1. Click **Navigator > Tools > Scheduled Processes**.
2. On the Schedule Process window, click **Schedule New Process**.
3. In the Schedule New Process window, make sure the **Job** option is selected.
4. Enter the name of one of the processes in the **Name** field and click **OK**.
5. On the Process Details window, click **Advanced**.
6. On the **Schedule** tab, select the **Using a schedule** option.
7. Select a frequency.
8. Enter an end date in the far future.
9. Click **Submit**.

## Modify Work Area Search Behavior

You can modify work area search behavior by setting the profile options listed in the following table.

**Note:** This topic applies only to work areas that use the legacy CRM search. If you're a new customer or if you opt in to use the new work areas that are based on Workspace, you must set up Adaptive Search and the saved searches for Workspace instead.

| Profile Option Code                   | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | Default Value |
|---------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------|
| ZCA_MIN_SEARCH_CHARACTER              | Sets the minimum number of characters required for searching in the work area searches. If your data volume is low, you can decrease the minimum number of characters required for search to one. If performance is an issue, you can improve search performance by increasing the minimum number of characters required for search to three.                                                                                                                                                                                                                                        | 2             |
| ZCA_MAX_NUMBER_OF_SUGGESTIONS_TO_SHOW | Controls the number of suggestions that are displayed in the autosuggest window in both global search and work area search.                                                                                                                                                                                                                                                                                                                                                                                                                                                          | 15            |
| ZCA_LM_FIND_USE_STARTSWITH            | <p>Setting this profile to Yes, substitutes the Starts With operator for searches in the work areas. This setting requires users to enter the first characters of the name of the object they're searching for.</p> <p>The default Contains operator makes it possible to search for the keywords within the name, including at the beginning, middle, or end of the name.</p> <p>If you set this profile to Yes, then the application ignores the setting of profile Include Similar Results in Searches (ZCA_LM_FUZZY_SEARCH). Results with similar spellings are never shown.</p> | N             |
| FND_PURGE_RECENT_ITEMS                | The number of days a search remains available as a suggestion in the recent items list. For example, the default value of 60 days means that when you start typing the name of an object in a work area search, the recent items list displays any matching items you searched on within the last 60 days.                                                                                                                                                                                                                                                                           | 60            |
| ZCA_MIN_CHARS_NEW_SUGGESTIONS         | The minimum number of characters that must be typed before recent items suggestions are triggered.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | 3             |

## Set the Profile Options

To set the system profile options, do the following:

1. Navigate to the Setup and Maintenance work area, and use the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. In the Search: Profile Option region, **Profile Option Code** field, enter the code.
3. Click **Search**.

The application displays the profile option information.

4. Make your changes.
5. Click **Save and Close**.

## Change Record Set Values

You can change the values that appear in the Record Set field list. Each record set value restricts a search to a subset of records. If a value doesn't apply to your implementation, for example, then you can remove the value from the list by entering an end-date. If you don't use sales teams or sales territories, then you can remove all of the values that restrict the search by sales team or by territory.

## Changing Record Set Lookup Values

1. Navigate to the Setup and Maintenance work area, and use the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Standard Lookups
2. In the **Meaning** field, enter %Record Set%.

3. Click **Search**.

The page displays a list of the lookup types for search filter record sets for the different sales objects. Here's a screenshot of the Manage Standard Lookups page showing some of the search results.

Manage Standard Lookups

SaveSave and CloseCancel

Search

Lookup Type

Meaning %Record Set%

Description

Module

SearchReset

Search Results

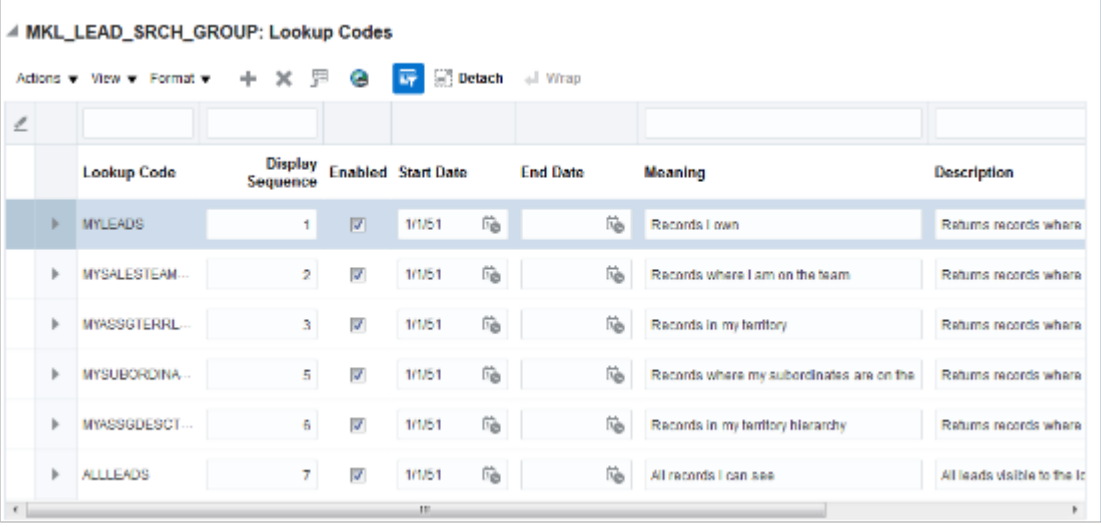
ActionsViewFormat+XRefreshDetachWrap

| Lookup Type          | Meaning                                  | Description                                      | Module                |
|----------------------|------------------------------------------|--------------------------------------------------|-----------------------|
| MKL_LEAD_SRCH_GRO... | Lead Search Filter Record Sets           | Record visibility filters for lead search.       | Sales Leads           |
| MKT_SALESCAMP_SRC... | Sales Campaign Search Filter Record Sets | Record visibility filters for sales campaign s   | Campaign Fundamentals |
| MOO_OPTY_SRCH_RE...  | Opportunity Search Filter Record Sets    | Record visibility filters for opportunity search | Opportunities         |

4. Select the lookup type you want to change in the search results.

5. You can edit the values in the Lookup Codes region. You must scroll down.

Here's a screenshot of the Lookup Codes region of the Manage Standard Lookups page for the Lead Search Filter Record Sets lookup type.



| Lookup Code    | Display Sequence | Enabled                             | Start Date | End Date | Meaning                                  | Description                   |
|----------------|------------------|-------------------------------------|------------|----------|------------------------------------------|-------------------------------|
| MYLEADS        | 1                | <input checked="" type="checkbox"/> | 1/1/51     |          | Records I own                            | Returns records where         |
| MYSALESTEAM... | 2                | <input checked="" type="checkbox"/> | 1/1/51     |          | Records where I am on the team           | Returns records where         |
| MYASSGTERRL... | 3                | <input checked="" type="checkbox"/> | 1/1/51     |          | Records in my territory                  | Returns records where         |
| MYSUBORDINA... | 5                | <input checked="" type="checkbox"/> | 1/1/51     |          | Records where my subordinates are on the | Returns records where         |
| MYASSGDESCR... | 6                | <input checked="" type="checkbox"/> | 1/1/51     |          | Records in my territory hierarchy        | Returns records where         |
| ALLLEADS       | 7                | <input checked="" type="checkbox"/> | 1/1/51     |          | All records I can see                    | All leads visible to the l... |

You can perform one or more of the following edits, depending on the lookup type:

- Change the wording the user sees in the list by editing the **Meaning** field.  
Changing the meaning doesn't affect application functionality.
- Remove a value from use by entering an end date.
- Change the display sequence.

6. Click **Save and Close**.

## Disable Rolling-Time Operators for Searches

You can use rolling-time operators, such as today, this week, and this month, as filters in work area searches. Searching for all the opportunities created this month, for example, returns all of the opportunities created in the current calendar month. The rolling-time operators use the time zone of the signed-in user for the calculation. You can disable any of the operators by editing the lookup type ORA\_ZCA\_ROLLING\_TIME (Rolling Time Values for Work Area Searches).

The predefined rolling-time operators include:

- Yesterday
- Today
- Tomorrow
- Last Week
- This Week
- Next Week
- Last Month
- This Month

- Next Month

Use the following steps to disable any of the values:

1. Navigate to the Setup and Maintenance work area, and use the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Standard Lookups
2. In the **Lookup Type** field, enter `ORA_ZCA_ROLLING_TIME`.
3. Click **Search**.
4. You can disable any of the rolling-time values, by enter an end date or deselecting the **Enabled** option.
5. Save your changes.

## Disable the Display of Search Results with Similar Spellings

By default the application displays records with similar spellings in the different work area search results. For example, if you are searching for accounts using the word software, then the application first displays the account names that contain that word, such as Compucon Software and Forte Software Inc, followed by names with similar spellings, such as Softgear Inc. You can disable the display of results with similar spellings in work area searches by setting the system profile option Include Similar Results in Searches to No.

**Note:** The application displays similar spellings in search results only if you are using the default contains search operator. If you set the system profile option Use Starts With Operator (ZCA\_LM\_FIND\_USE\_STARTSWITH) to Yes, then similar spellings are never shown in search results regardless of the setting of the system profile option Include Similar Results in Searches.

To disable the display of similar spellings in search results, do the following:

1. Navigate to the Setup and Maintenance work area, and use the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. In the Search: Profile Option region, **Profile Display Name** field, enter `Include Similar Results in Searches`.
3. Click **Search**.
 

The application displays the profile option information.
4. In the ZCA\_LM\_FUZZY\_SEARCH: Profile Values section, select **No** from the **Profile Value** list.
5. Click **Save and Close**.



## Enable Additional Search Operators for Text and List Field Searches

You can enable additional operators (Is Blank, Is Not Blank, and Does Not Equal) for searches in text fields and fields validated by lists of values. For example, selecting the Is Blank operator, makes it possible for salespeople to search for records missing values.

These operators aren't available by default because their use can affect search performance. You can make these operators available on mandatory standard and custom fields, by setting one or both of the following two system profile options to Yes:

- Enable Additional Search Operators for Text Fields (ZCA\_ENABLE\_ADDITIONAL\_TEXT\_OPERATORS) enables the Is Blank and Is Not Blank operators in text field searches.
- Enable Additional Search Operators for List of Values (ZCA\_ENABLE\_ADDITIONAL\_LOV\_OPERATORS) enables the Is Blank, Is Not Blank, and Does Not Equal operators in fields validated by lists of values (both fixed choice and dynamic choice list fields).

Here's how to display the additional operators:

1. Navigate to the Setup and Maintenance work area, and use the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. In the Search: Profile Option region, **Profile Display Name** field, enter `Enable Additional Search Operators`.
3. Click **Search**.  
The application displays information for the two system profile options.
4. Select the name of the system profile option you want to enable.
5. In the Profile Values section, select **Yes** from the **Profile Value** list.
6. Click **Save and Close**.

## Configure Work Area Lists

Here are some procedures you can use to configure work area lists, also called saved searches for those work areas that use the legacy CRM search. You can create lists to replace those supplied by Oracle and you can make your lists available to all users or target users with specific job roles. You can also specify which list appears by default when salespeople open a work area.

**Note:** This topic applies only to work areas that use the legacy CRM search. If you're a new customer or if you opt in to use the new work areas that are based on Workspace, you must set up Adaptive Search and the saved searches for Workspace instead.

**Note:** If you're creating lists for a specific job role, then you must first provision yourself with that job role so you can test your work before publishing the sandbox. See the steps outlined in the related topic Assigning Yourself an Additional Job Role.

Here's an overview of the steps to configure work area lists:

1. Get ready by entering a sandbox with Page Composer.
2. Navigate to the work area landing page you want to configure and open Page Composer.
3. Make your modifications:
  - o Create your own list.
  - o Hide lists provided by Oracle.
  - o Delete any of the lists you created.
  - o Make a different list appear by default when salespeople open the work area.
4. Publish the sandbox to make your changes available to users.

## Get Ready to Configure Work Area Lists

1. Create and enter a sandbox with Page Composer as the tool. Other tools don't allow you to make changes at the job-role level, so creating a separate sandbox is a good idea if you're configuring lists for a specific job role.
  - a. Navigate to **Configuration > Sandboxes**.
  - b. Click **Create Sandbox**.
  - c. In the Create Sandbox page, enter a name and select **Page Composer** as the tool.
  - d. If you're making changes for a specific job role, then specify the job role for Page Composer:
    - i. Click **Edit** in the **Support Context** column for Page Composer.
    - ii. In the Edit Sandbox Context window, select the job role.
    - iii. Click **OK**.
  - e. Click **Create and Enter**.

The Sandbox toolbar appears at the top of the page.
2. Navigate to the work area you want to modify.
3. Open Page Composer by selecting the tool from the **Tools** menu in the sandbox bar at the top of the page.

## Create a List

With both the sandbox and the Page Composer toolbar displayed on the top of the page, create your list. You create a new list by editing an existing list and saving it under a new name.

1. In the work area landing pad, click **Show Advanced Search** next to the **List** field.
2. From the Advanced Search panel **Saved Search** list, select a saved search to use as the starting point for creating a new one.

**Tip:** To create a list using only one field, including custom fields, select a search with either Name or Close Date in the title. For opportunities and leads, select the **Close Date** saved search. For all other objects, select the name saved search, for example, the **Account Name** saved search or the **Contact Name** saved search.

3. Make your changes. You can:
  - o Select a different record set to change the scope of your search. For example, selecting **My territory hierarchy** searches all the records in your territories and their subordinate territories. The available record sets vary from object to object.

To improve saved search performance, restrict your saved searches to smaller record sets. For example, rather than searching all the records you can see, search all the records in your territory hierarchy. Or

restrict your searches to a smaller geographical area. For example, search all the accounts in one state instead of the whole country.

**Note:** For performance reasons, Oracle recommends that you don't use **Creation Date** as a search filter when using the legacy CRM search, because it isn't an indexed field.

- o Add additional fields by clicking **Add**.

**Note:** If you're adding a custom field to your search, then the field must be indexed for best search performance.

- o Select operators for the fields in your search. While most of the operators, which differ field by field, are self-explanatory, here are some notes on the more complex:

- **Between**

Selecting the Between operator for a date field, prompts you to enter a specific date range for the search.

- Rolling-time operators, including **Yesterday, Today, Tomorrow, Last Week, This Week, Next Week, Last Month, This Month, and Next Month**

Searching for opportunities created this month, for example, returns opportunities created in the current calendar month. The rolling-time filters use the time zone of the signed-in user for the calculation.

- **Current User**

In some fields, including the Last Updated By and Created By fields, you can create a list that displays only the records relevant to each signed-in user. For example, when you create a list of all opportunities last updated by the current user, all of your users can view the opportunities they recently updated.

- **Is Blank, Is Not Blank, and Does Not Equal**

Selecting the Is Blank operator, makes it possible to search for records missing values in a text field or a field validated by a list of values, for example. Administrators can make these operators available on fields that are not mandatory, by setting two system profile options. The Enable Additional Search Operators for Text Fields (ZCA\_ENABLE\_ADDITIONAL\_TEXT\_OPERATORS) profile option enables the Is Blank and Is Not Blank operators in text field searches. The Enable Additional Search Operators for List of Values (ZCA\_ENABLE\_ADDITIONAL\_LOV\_OPERATORS) enables the Is Blank, Is Not Blank, and Does Not Equal operators on fields validated by list of values (both fixed choice and dynamic choice list fields).

- o Specify which attributes you want to display in the search results table by selecting **Columns** from the **View** menu.

You can select specific columns or display all columns.

- o Reorder the filter conditions by clicking **Reorder**.
- o Delete any fields you added to the search.

You can't delete the fields provided by Oracle. You can only delete fields you added.

4. You can test your search by clicking **Search**.
5. When you're satisfied with the results, click **Save**.
6. In the Create Saved Search window, enter a new name for the saved search.

You can't reuse the names of the saved searches provided by Oracle with the application.

7. Make sure the **Run Automatically** option remains selected. Selecting this option runs the query each time you select the list in the UI.
8. If you want users to see the list generated by this search when they navigate to the work area, then select the **Set as Default** option.

**Note:** Making a search the default doesn't override any default searches individual users may have created for their own use. Each user can personalize lists provided by administrators.

9. Click **OK** to return to the work area landing page.

## Hide a Saved Search Provided by Oracle

You can't delete a search provided by Oracle, but you can hide it. Here's how. If you want to hide a saved search that's designated as the default search, then you must first designate a different list as the default.

1. In the work area list page, click **Show Advanced Search** next to the **List** field.
2. From the Advanced Search panel **Saved Search** list, select a saved search that's different from the one you want to hide.
3. Now select **Personalize**.
4. In the Personalized Saved Searches window, select the saved search you want to hide.
5. Deselect the **Show in Search List** option.
6. Click **OK**.

A saved search supplied by Oracle remains available for future use but doesn't display in the work area. You can restore the saved search to the list in the future by selecting the **Show in Search List** option.

## Delete a Saved Search You Created

You can delete searches that you or other administrators created.

**Note:** If you delete a saved search specified as the default, then no list displays when users navigate to the work area.

1. In the work area landing pad, click **Show Advanced Search** next to the **List** field.
2. In the Advanced Search panel **Saved Search** list, select a saved search you want to delete.
3. Now select **Personalize**.

The Personalize Saved Searches window **Saved Searches** list displays the name of the saved search you're about to delete.

4. Click **Delete**.
5. Click **OK**.

## Save Your Work and Publish the Sandbox

1. When you're done making your changes, you must save them by clicking **Close** in the Page Composer toolbar.
2. Publish the sandbox by clicking the sandbox name and selecting **Publish**.

### Related Topics

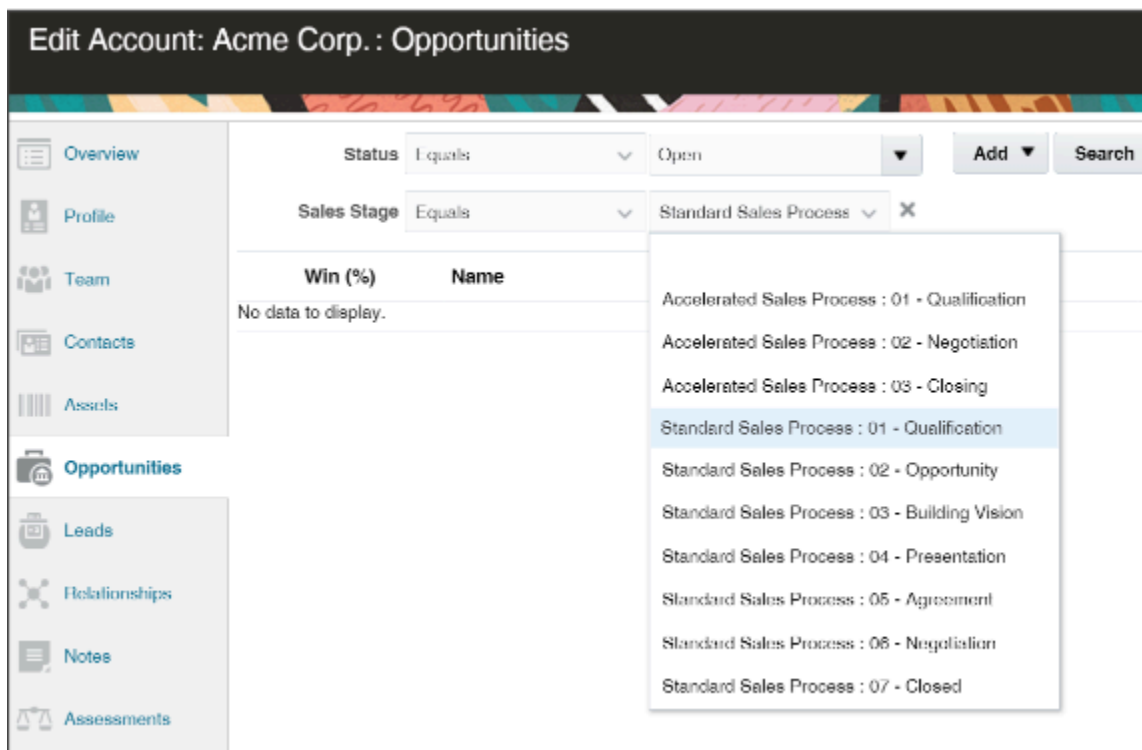
- [Overview of Sandboxes](#)
- [Publish Sandboxes](#)
- [Create and Activate Sandboxes](#)
- [What gets saved when I create a saved search for searches with multiple criteria?](#)
- [Assign Yourself Additional Job Roles Required for Testing](#)

## Search in Subtabs

### Configure Default Search in Subtabs

You can specify what information displays by default in all of the standard application subtabs with the exception of Service Requests and Installed Base Assets tabs. When salespeople open a subtab, they see a list of records based on the default search criteria that you set.

For example, when salespeople open the Opportunity subtab on an account, they see a list of all open opportunities they have the permission to view. As an administrator, you can change the default search criteria that generate the list. For opportunities, you can add Sales Stage as a filter, to narrow down the list, for example. Here's a screenshot of the Opportunity subtab with the additional Sales Stage filter.



Salespeople can change the default search value, but they can't change the default search field. However, they can refine their search by adding additional search fields and values at runtime. Adding a default search filter to a subtab

is optional. If you skip this step, then search fields aren't automatically added to the subtab, but users can still see the search region and perform their desired search.

For tabs that are common to objects such as contacts, set the default search criteria or operator for only one object. The criteria is set for all the objects where that tab is displayed. If you decide to set different criteria for the same subtab on different objects, then the last saved change is reflected at runtime. In other words, it's not possible to have different search criteria for a subtab that's shared across objects.

**Note:** You can select only one default search filter for each subtab. When adding a default search filter to standard subtabs, the search filter applies to all existing details page layouts with this subtab. Let's say you add a search filter to the Lead subtab on an Opportunity details page layout. This means that the same search filter is added to the Lead subtab on an Account details page layout.

The procedure to add a default search filter field, operator, and value is the same for all objects such as, accounts, leads, and opportunities. Here's an example procedure for the Contacts subtab search on the Edit Lead page.

1. Ensure you're in an active sandbox
2. Click **Navigator > Configuration > Application Composer**.
3. In the Objects navigation tree, expand **Standard Objects**, expand **Sales Lead**, and click **Pages**.
4. Ensure that the **Application Pages** tab is selected.
5. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
6. Type a new layout name and click **Save and Edit**.

The Details Layout page appears.

7. In the **Subtabs Region**, highlight **Contacts** and click the pencil icon.
8. From the **Configure Detail Form** page region, go to the **Configure Summary Table: Search Region**.
9. Select the default search filter to apply to the Contacts subtab.

You can select from a list of both standard and custom Contact fields. Note that you can't pick dynamic choice list fields, set ID-based fixed choice list fields, and any fields that aren't searchable. Also, if the subtab was added based on a many-to-many (M:M) relationship, then you can select from only those intersection object fields that are already displayed on the subtab.

For example, you want to create a search filter to search for all contacts that have a job title of sales manager. Select **Job Title** from the drop-down list and select **Equals** as the operator and enter Sales Manager.

10. Click **Done** and ensure that the layout status for your Contacts subtab layout is set to Active.
11. Test the changes: Navigate to **Sales > Leads** as a user with access to the leads pages. Edit a lead and confirm that the data that displays on the Contacts subtab includes only contacts with a job title of sales manager.
12. Publish the sandbox.

## Overview of Configuring Resource Search

You can configure resource search according to your business needs. You can:

- Create dynamic, role-based picker layouts
- Show or hide standard fields for search
- Show or hide results sections
- Re-arrange fields in the search and result sections

- Define default values for search fields
- Mark certain fields as required or read-only

Salespeople can use the resource search tools you have configured to search and associate other resources with the relevant business objects. Salespeople can search using the custom fields and view custom fields in the search results, allowing them to find and select the right resource records.

You can also configure custom dynamic choice lists for the Resource object that are similar to the predefined search tools.

**Note:** Prior to Oracle Cloud Applications Release 13, Update 18C, different styles of resource search tools existed across different sales object flows. From Update 18C, there is a single, unified search tool for the Resource object, which you can configure, although specific capabilities might differ. For example, auto-suggest isn't supported in resource search criteria for the organization field.

For procedures detailing how to extend the search, see the *Configuring Applications Using Application Composer* guide.

## Configure Resource Search

You can configure resource search, enabling users to search and associate a resource as an owner or a team member to a business object, such as account, contact and opportunity.

Setting up the resource search involves:

- Creating a dynamic page layout for the resource object
- Configuring the resource picker

### Creating a Dynamic Page Layout for the Resource Object

To create a dynamic page layout for the resource object:

1. Ensure that you're working in an active sandbox.
2. Navigate to **Application Composer**.
3. Under the **Objects** navigation tree, expand the tree structure for the **Resource** object.
4. Click the **Pages** node.
5. Select the **Application Pages** tab.
6. In the Search and Select Dialog Layouts region, create a custom layout.
7. Click the link for the custom layout name you created and set up the fields.
  - To set up the fields in the search region:
    - i. Click the edit icon next to Search Region.
    - ii. In the Configure Search Region area, select the fields that should appear in the search region. Optionally, you can set the default operator for the fields in the search region and set the fields as required.
    - iii. Click **Save and Close**.
  - To set up the fields in the search results:
    - i. Click the edit icon next to Search Results.
    - ii. In the Configure Detail Form area, select the fields that should appear in the search results.

- iii. Click **Save and Close**.
  - o Test the changes and publish the sandbox according to your company's business practices.

## Configuring the Resource Picker

To configure the resource picker:

1. Ensure that you're working in an active sandbox.
2. Navigate to **Application Composer**.
3. Under the **Objects** navigation tree, expand the tree structure for the required object, such as Account.
4. Click the **Pages** node.
5. Select the **Application Pages** tab.
6. In the Details Page Layouts region, navigate to the link for your custom layout if it already exists, otherwise create a new custom layout.
7. Click the link for the custom layout name.
8. In the Subtabs Region, click the required subtab, such as Profile, and click the edit icon next to Summary.
9. In the Configure Detail Form region, click the edit icon next to the Owner field or any custom dynamic choice list field you have added.
10. Based on your requirements, you can set the default value for the fields. You can also set the fields as read-only.
11. Click **OK**.
12. Click **Save and Close**.
13. Test the changes and publish the sandbox according to your company's business practices.



# 14 Work Assignment

## Overview of Assignment Processing Components

You can use assignment processes to assign resources (for example, salespeople or territory owners) to the business objects they work on, such as an opportunity or a lead. Once assigned, resources and territory owners, along with their managers, have visibility into the business object.

### Candidate and Work Objects

When setting up assignment, you should be familiar with two types of assignment objects: candidate objects and work objects:

- Work objects are the business objects that get assigned, for example, accounts, opportunities, leads, partners, and deals.
- Candidate objects are the possible pool of assignment candidates, for example resources or territories.

### Territory-Based Assignment

After you set up your territories, territory-based assignment matches territory dimensions and attributes to work objects. You can set up territory-based assignment to be completely automated, to happen on-demand, or you can use a combination of these settings. Territory-based assignment requires that you set up your territories and resource hierarchy, set profile options to configure assignment, and run assignment processes.

For an introduction to setting up territory-based assignment, start with the topic, *Overview of Sales Territory and Assignment Setup*.

### Rule-Based Assignment

Rule-based assignment lets you set up additional rules used to assign resources to work objects. Rule-based assignment lets you capture attributes not defined in territory-based assignment. Once you set up the rules containing conditions that records must meet, then resources get assigned to the object when they match the rule conditions.

For example, you can use rules to:

- Assign a certain salesperson to the sales team when the customer is located in specific state or region.
- Assign the accelerated leads expert to leads whose time frame is less than three months.
- Calculate lead rank based on lead score.

Rule-based assignment requires that you plan your rules, create the rules using the rules UI, and set profile options to configure assignment, in addition to any scheduled processes that must be run.

### Assignment Profile Options

Each of the business objects available in assignment has its own set of profile options that allow you to further configure assignment.

## Scheduled Processes

Scheduled processes are batch jobs that capture data and allow business objects to act on that data. You must schedule several processes when using assignment.

## Assignment Reports

You can use the Diagnostic Dashboard to generate reports about assigned objects and the volume of territory data involved in assignment.

## Assignment Resources

Read more about assignment:

- [Considerations for Configuring Assignment](#)
- [Implementing Sales](#) guide for more discussion of assignment in sales.
- Assignment Resource Center: For additional assignment articles, see the Assignment Manager Resource Center (1522958.1) on [My Oracle Support](#).

# Implementation Concepts for Assignment

## Considerations for Configuring Assignment

Assignment is the process of selecting a candidate object and executing the association with a work object. Assignment consists of three phases:

- Setup phase: Setting up assignment processing through assignment configuration
- Matching phase: Matching rules or mappings are evaluated to find the right assignees from a list of possible candidates
- Assignment phase: The assignment of matching candidates is handled

An assignment configuration is predefined for each sales application providing assignment processing. This assignment configuration is available from one of these setup tasks:

- Manage Customer Center Assignment Objects
- Manage Sales Assignment Manager Objects
- Manage Sales Lead Assignment Objects

You can use these setup tasks to add or remove assignment attributes, define the relationship between each work object and candidate object, and define mapping sets and mappings that drive territory-based assignment and rule categories that drive rule-based assignment.

**Note:** Use the Manage Sales Assignment Manager Objects task for opportunity assignment.

The predefined assignment configuration also includes the mapping sets and mappings that drive territory-based assignment.

To best plan the configuration, consider these points.

- Assignment objects
- Attributes
- Related candidates
- Mappings sets and mappings
- Rule categories, rule sets, and rules

## Assignment Objects

An assignment object is a data entity or a collection of data treated as a unit, such as a sales account, an opportunity, or a lead. During assignment configuration, carefully consider which of your business objects require assignment, and create work objects only for those.

A set of assignment objects is predefined for the assignment of territories or resources to accounts, partners, opportunities, leads, and deals.

## Attributes

You use attributes to further define assignment processing. For example, you might want to assign a sales representative (resource) to an opportunity (assignment object), based on the risk level of the opportunity. In this case, you select the attribute of the opportunity work object that corresponds to risk level, and the attribute of the resource candidate object that corresponds to name or email. Selecting these attributes makes them available for mappings and for conditions on your rules. Therefore, ensure that you select the attributes that reflect the criteria that you want to use for matching candidate objects to work objects.

Several attributes are predefined as assignment attributes for each assignment object.

## Related Candidates

Candidate objects are related to work objects, and, for each relationship, the appropriate assignment mode (such as matching and scoring) and processing options are predefined. You must not modify these predefined settings except for the **No Matches Handling** option for the Sales Lead work object. The **No Match Handling** option controls the assignment action when no matching candidate is found. By default, this is set to **Remove current assignment**. You can change this to **Retain current assignment**, which retains the current candidate assignment when no matching candidate is found. You can also change it to **Error**, which generates an error if no matching candidate is found.

## Mappings Sets and Mappings

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

Default mapping sets and their related mappings are predefined.

## Rule Categories, Rule Sets, and Rules

The application provides default rule categories. These rule categories identify the type of rule processing being performed, such as matching, scoring, classification, or territory. Rule sets group the assignment rules and determine the additional processing performed, such as using scores for each candidate and filtering the candidates assigned to top or random matches. Rules are defined to execute rule-based assignment. Rules are designed to return candidates if they match a set of criteria, are within a defined scoring range, or are of a specific classification.

Create rules using work objects, candidate objects, and attributes that you already established. When designing your rules, carefully consider how you want to match candidates to work objects. For example:

- Do you want resources assigned based on their geographic location, their product knowledge, on the status or score of an object, or a combination of any of these attributes?
- Do you want to match candidates only, or do you want to match candidates and score them?
- In a multiple-candidate scenario, do you want to assign all matching candidates or only those who achieve higher than a specific score?

#### *Related Topics*

- [What types of assignment rules can I create?](#)
- [Assignment Rule Components](#)

## Assignment Objects and Rules Setup Data Migration

This topic explains exporting and importing assignment objects and rules setup data, along with the points to consider while moving the setup data.

Almost all application implementations require moving functional setup data from one instance into another at various points in the lifecycle of the applications. For example, a typical case in any enterprise application implementation is to first implement in a development or test application instance and then deploy to a production application instance after thorough testing. You can move functional setup configurations for assignment objects or assignment rules from one application instance into another by exporting and importing configuration packages from the Manage Configuration Packages page.

To export and import assignment setup data, you should start by defining an implementation project for the required assignment setup task:

- Manage Customer Center Assignment Objects
- Manage Object Sharing Assignment Objects
- Manage Object Sharing Rules
- Manage Sales Assignment Manager Objects
- Manage Sales Assignment Manager Rules
- Manage Sales Lead Assignment Objects
- Manage Sales Lead Assignment Rules
- Manage Service Assignment Objects
- Manage Service Assignment Rules

The Manage Configuration Packages setup task exports the assignment objects or rules setup data.

A configuration package contains the setup import and export definition. The setup import and export definition is the list of setup tasks and their associated business objects that identifies the setup data for export as well as the data itself. You generate the setup export and import definition by selecting an implementation project and creating a configuration package. The tasks and their associated business objects in the selected implementation project define the setup export and import definition for the configuration package. In addition, the sequence of the tasks in the implementation project determines the export and import sequence.

You can export a configuration package once you create it, or at any time in the future. During export, appropriate setup data will be identified based on the setup export definition and added to the configuration package. The setup data in the configuration package is a snapshot of the data in the source application instance at the time of export. Therefore you must publish the assignment objects and rules before export. After the export completes, you can download the configuration package as a compressed archive of multiple XML files, move it to the target application instance, and upload and import it. You must review and publish the assignment objects and rules setup data in the target application instance to make them available for assignment processing.

See the chapter about importing and exporting setup data in the Using Functional Setup Manager guide for more details.

## Considerations for Exporting and Importing Setup Data

Based on your implementation, you might have to follow different approaches while exporting and importing assignment setup data.

Consider these points:

- If your implementation is using territory-based assignment only, then the implementation project must only include the Assignment Objects setup tasks.
- If your implementation is using territory-based assignment with rule filtering or rule-based assignment, the implementation project should include both the Assignment Objects and Assignment Rules setup tasks.
- If you aren't sure whether your implementation is using territory or rule-based assignment, then Oracle recommends that you include both Assignment Objects and Assignment Rules setup tasks in the implementation project.
- The sequence of the tasks and business objects should remain per the default sequence.

You can delete assignment objects, assignment attributes, rule categories, rule sets, rules and conditions in a test environment. If the setup data subsequently is exported and then imported into another environment, for example a production environment, then the data in the target database isn't removed.

If your implementation plans to import and export setup data for assignment objects and assignment rules, you must ensure not to delete assignment objects, rule categories, rule sets, and rules. You must set them to inactive in case you want to delete them. Additionally, you must not delete assignment rule conditions. Instead, you must set the rule to inactive and then recreate the rule excluding the condition that's no longer needed.

### Related Topics

- [Overview of Setup Data Export and Import](#)

## Example of Uploading Assignment Objects and Rules Setup Data to a CSV File

This topic explains exporting and importing assignment objects and rules setup data to a CSV file, along with the points to consider while moving the setup data.

When you enter or update a large volume of setup data for a task, using user interfaces to individually enter or update them may not be the most efficient method. In such cases, you can upload setup data in bulk by using export and import processes at the task level. This method requires that your setup data is available in a CSV file format.

To export and import assignment object and rules setup data, you should start by defining an implementation project for the required assignment setup task:

- Manage Customer Center Assignment Objects
- Manage Object Sharing Assignment Objects
- Manage Object Sharing Rules

**Note:** Access Groups and Access Group Members must exist in the target environment before you export and import for this setup task.

- Manage Sales Assignment Manager Objects
- Manage Sales Assignment Manager Rules
- Manage Sales Lead Assignment Objects
- Manage Sales Lead Assignment Rules
- Manage Service Assignment Objects
- Manage Service Assignment Rules

**Note:** You need the following privileges to export and import assignment objects and rules setup data:

- Submit Export Setup Data Process (ASM\_SUBMIT\_EXPORT\_SETUP\_DATA\_PROCESS\_PRIV)
- Submit Import Setup Data Process (ASM\_SUBMIT\_IMPORT\_SETUP\_DATA\_PROCESS\_PRIV)
- Task-specific privileges

Refer to the Oracle Applications Cloud Security Reference for Common Features guide for detailed information about task-specific privileges.

## Export and Import Setup Data Considerations

Based on your implementation, you might have to follow different approaches while exporting and importing assignment setup data.

Consider the following points:

- If your implementation is using territory-based assignment only, then the implementation project must only include the Assignment Objects setup tasks.
- If your implementation is using territory-based assignment with rule filtering or rule-based assignment, the implementation project should include both the Assignment Objects and Assignment Rules setup tasks.
- If you aren't sure whether your implementation is using territory or rule-based assignment, then Oracle recommends that you include both Assignment Objects and Assignment Rules setup tasks in the implementation project.
- Access Groups and Access Group Members must exist in the target environment before you export and import using the Manage Object Sharing Rules setup task.
- The sequence of the tasks and business objects should remain per the default sequence.

The application lets you delete assignment objects, assignment attributes, rule categories, rule sets, rules and conditions in an environment, for example test. If that setup data subsequently is exported and then imported into another environment, for example production, the data in the target database isn't removed.

If your implementation plans to import and export setup data for assignment objects and assignment rules, you must not delete assignment objects, rule categories, rule sets, and rules. You must set them to inactive in case you want to delete them. Additionally, you must not delete assignment rule conditions. Instead, you must set the rule to inactive and then recreate the rule excluding the condition that's no longer needed.

## Export Assignment Objects and Rules Setup Data to a CSV File

To export assignment objects and rules setup data to CSV file, follow these steps:

1. Select **Navigator > My Enterprise > Setup and Maintenance** and go to setup pages that you want. For example, to export Manage Sales Assignment Manager Objects, go to the following:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Sales Assignment Manager Objects
2. From the **Actions** menu, select **Export to CSV file**. This option is disabled if the task doesn't support export.
3. Select **Create New**. You can export all existing setup data represented by the Manage Sales Assignment Manager Objects task.
  - o If Scope is supported for the task, you can select appropriate scope values to filter the setup data you want to export.
  - o You can also download the template without exporting the existing setup data in the environment. To do so, select the **Export only template files** check box.
4. Click **Submit** to start the export process.
5. Select **Export to CSV file** to see the latest process. Monitor the process until it completes.
6. Select the process once it completes to review the results. Verify that the process completed without any errors before you download and extract the CSV file.
7. You may find more than one CSV file if there are more than one business object associated with the task.

## Prepare Assignment Objects and Rules Setup Data in a CSV File

To enter or modify the assignment objects and rules setup data in the CSV file, follow these steps:

1. Open Microsoft Excel and click the Data tab.
2. In the **Get External Data** group, click **From Text**.
3. Navigate to and select the CSV file you downloaded.
4. Select **Delimited as Data Type** and click **Next**.
5. Select **Comma** as delimiter and click **Next**.
6. Select **Text** as column data format for all columns and click **Finish**. You can now edit the file.
7. Make the necessary changes and save the CSV into a .zip file. The file is ready for import.

**Note:** The CSV file size must not exceed 10MB.

## Import Assignments Objects and Rules Setup Data in a CSV File

To upload the new or modified assignment objects and rules setup data, follow these steps:

1. Select the appropriate task from the Tasks region. For example, to import Manage Sales Assignment Manager Objects, go to the following:

- Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Sales Assignment Manager Objects
2. Select **Import from CSV file** from the Actions menu.
  3. Select **Create New**.
  4. Select the appropriate .zip file that you created. See the Preparing Assignment Objects and Rules Setup Data in a CSV File section. The application validates that the file corresponds to the selected task before you can submit the process.
  5. Click **Submit**.
  6. Select **Import from CSV file** to see the latest processes. Monitor the process until it completes.
  7. Select the process once it completes to review the results. If any errors occur, review the details listed in **Status Details** in the **Business Objects** section. Fix the issues and import again, if necessary.
  8. After you import the assignment manager objects setup data successfully, you can verify the loaded data by selecting the Manage Sales Assignment Manager Objects task from the Setup page.

See the chapter about importing and exporting setup data in the Using Functional Setup Manager guide for more details.

#### *Related Topics*

- [Set Up an Offering with Scope](#)
- [Export and Import CSV File Packages](#)

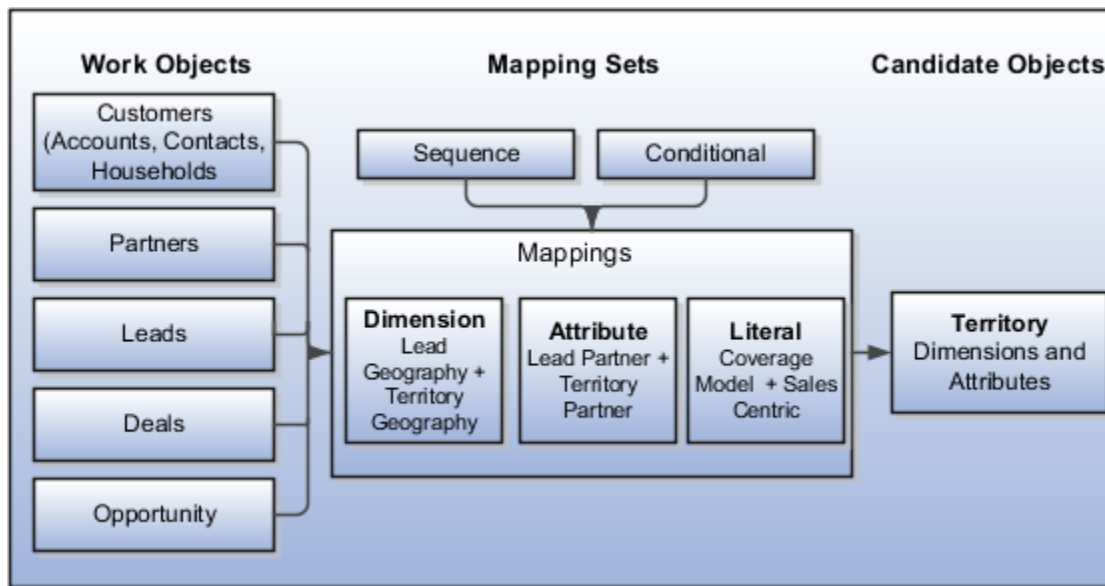
## Assignment Mappings

### Assignment Mapping Set Components

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

This figure shows an example of the sales application work objects that have associated default mapping sets and mappings. Mapping sets and mappings drive territory-based assignment, and the work object attributes map to the territory candidate object dimensions and attributes.





## Mappings

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

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

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

## Mapping Sets

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

## Mapping Types

There are three types of assignment mapping:

**Dimension Mapping:** Dimension mappings must be used when the work object and candidate object attributes in the comparison are dimension attributes, such as Product. When creating the mapping, use the Function Code field to specify a unique identifier for the dimension. Generally attribute mappings are used when the work object and candidate object attributes in the comparison are non-dimensional attributes.

**Note:** The Geography dimension is obsolete. Use the Address dimension for geographical territories. Documentation is being updated to reflect this change.

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

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

**Attribute Mapping:** This mapping enables you to compare and match attribute values between a work object attribute and a candidate object attribute. When the value of the candidate object attribute matches the work object attribute, the candidate is selected. Attribute mappings are typically used when the work object and candidate object attributes in the comparison are non-dimensional attributes. This type of mapping is also used to capture the mapping between hierarchical dimensions account and geography.

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

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

**Note:** For Literal Mappings, ensure that the value entered corresponds to the Lookup Type Value code. Don't enter the meaning of the lookup.

## Assignment Processing Using Mapping Sets and Mappings

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

**Note:** The Geography dimension is obsolete. Use the Address dimension for geographical territories. Documentation is being updated to reflect this change.

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

In the case of leads, the mapping set sequence is important as the territories matched using the first mapping set may result in a primary partner being added to the lead. This information is significant to the territory matching performed using the second mapping set.

Mapping sets can be made conditional to control whether the mapping set is used or not used during assignment processing. For example, the partner channel manager territory assignment mapping set conditional attribute is set to the value **RevenuePartnerId**. During the assignment processing of a revenue line, if the **RevenuePartnerId** attribute for that revenue line contains a value, then this mapping set will be used in territory matching processing.

An indicator in the Related Candidates region controls whether to merge the matching assignment candidates identified from processing each set of mappings. This indicator is used to drive the merging of matching candidates when multiple mapping sets are used in assignment processing. If the box is checked, then the candidates are merged. Candidates aren't merged by default.

In most implementations, the predefined mapping sets are sufficient. But mapping sets can offer some flexibility if user-defined assignment processing is needed.

## Examples of Creating Assignment Mappings

For territory-based assignment, you must create work object to candidate object mappings while creating the assignment object. These mappings are used to make candidate assignments. The scenarios in this topic illustrate creating the different mapping types:

- Attribute mapping
- Dimension mapping
- Literal mapping

### Create an Attribute Mapping

You want to assign territories to an opportunity revenue line when the territory line of business is the same as the opportunity line of business. Here's how to create an attribute mapping:

1. Create the following mapping:
  - Work object - Revenue
  - Candidate object - Territory
2. Select the territory when the attribute territory line of business code is equal to the revenue line of business.
3. Enter a value for the sequence which determines the order in which the mapping is used when matching territories.

**Note:** Assign the lowest sequence number to the most selective mapping, and the next sequence number to the next most selective mapping.

## Create a Dimension Mapping

You want to assign territories to opportunity revenue lines based on the product associated with the revenue line. Here's how to create a dimension mapping:

1. Select the mapping type **Dimension** and enter a sequence value, which determines the order in which the mapping is used when matching territories. The most selective dimension mapping should be given the lowest sequence number.
2. Enter the function `getDimMemberSequence` and the Service `oracle.apps.sales.territoryMgmt.territories.publicModel.util.ConsumableComponentsUtil`.
3. Enter the value `Prod` for the function code.
4. Select the candidate object **Territory**, the work object **Revenue**, and the alternate work object **Revenue**.
5. Select the candidate object low and high attributes.

The candidate object low and high attributes correspond to the names of the low sequence and high sequence attributes for product on the territory. For example, Dimension Sequence Low and Dimension Sequence High respectively.

6. Select the work object low and high attributes.

The work object low and high attributes correspond to the names of the attributes for product on the revenue line. For example, Inventory Item ID and Inventory Organization ID respectively.

When assigning territories to opportunity revenue lines based on the product, a revenue line may be for a product group instead of a product. In this case, the work object alternate low and high attributes can be used. For example, alternate work object low attribute would be set to Product Group.

If the revenue line doesn't contain either a product or product group, the low and high default values for the product dimension mapping can be used to match against the product dimension with the value **Any**. In this example, the default value low would be set to 1 and default value high to 9999999999999999.

## Create a Literal Mapping

Literal mappings are a way of filtering the matched territories based on specific values of a territory attribute. You want to find only territories that have an account-centric coverage model assigned to each revenue line. For example, territory coverage model equals SALES\_ACCOUNT\_CENTRIC.

**Note:** Literal mappings use the code value for lookup-based fields, and not the meaning value.

Here's how to create the literal mapping:

1. Select the mapping type **Literal** and optionally enter a sequence value, which determines the order in which the mapping is used when matching territories.
2. Select the candidate object **Territory**.
3. Select the candidate object attribute that will be used for filtering. For example, Coverage Model.
4. Select the operator value **Equals**.
5. Select the literal value. In this example, only sales account-centric territories should be assigned to revenue lines, so the Literal Value entered corresponds to the code value for the coverage model. For example, SALES\_ACCOUNT\_CENTRIC.

### Related Topics

- [What types of assignment rules can I create?](#)

# Assignment Rules

## Assignment Rule Components

The rule category, rule sets, and rules are components that work together to determine how the assignment engine processes rule-based assignments for work objects.

Rule categories are predefined for each object leveraging assignment rules. Each predefined rule category determines the type of rule processing performed, for example, matching, scoring, and classification.

Depending on the rule category selected, rule sets may allow filters to be used to determine whether all matches are assigned, or a random number of matches. Additionally, a score may be used to allow further filtering of the matching candidates, such as the top X candidates or all above or equal to a minimum score.

At the rule level within a rule set, the action determines what happens when a rule is evaluated as true. The rule action option works in conjunction with the rule category selected.

Here's how the rule set components work together.

| Mode                                                                                                    | Use Score      | Filters                                                                                                                                                   | Action                                                      |
|---------------------------------------------------------------------------------------------------------|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------|
| Matching or Territory<br><br>Applicable only if you use territory-based assignment with rule filtering. | X              | All<br><br>All Above Minimum Score (set Minimum Score value)<br><br>Random (set Number of Candidates value)<br><br>Top X (set Number of Candidates value) | Increase Score By x for each matching or selected candidate |
| Matching or Territory<br><br>Applicable only if you use territory-based assignment with rule filtering. | Not applicable | All<br><br>Random (set Number of Candidates value)                                                                                                        | Assigns the matching or selected candidates.                |
| Scoring                                                                                                 | Not applicable | Not applicable                                                                                                                                            | Increase Score By x                                         |
| Classification                                                                                          | Not applicable | Not applicable                                                                                                                                            | Set Value To x                                              |

## Rule Category and Rule Set

The rule category selected for the rule set determines the type of rule-based assignment processing to be performed. For example, if you select the rule category named Sales Lead Resource Rule Category, the candidates that match the conditions of the rules evaluated as true by the assignment manager are assigned to the work object. The number of

matching candidates that are assigned to the work object is determined by the rule set filter settings. Only one rule category can be associated with each rule set.

A rule category is predefined for each type of rule-based assignment processing supported by each sales application object. For example, the rule category named **Sales Team Member Recommendation Default Rule Category** is predefined for resource rule-based assignment of Opportunities, and **Sales Lead Resource Rule Category** is predefined for resource rule-based assignment of Leads. Similar rule categories can be predefined for territory rule filtering for revenue lines, territory rule filtering for leads, lead scoring, lead raking, and lead qualification.

Rule categories are created and edited through the Manage Assignment Objects setup task for the relevant application. A rule set contains rules that belong to a specific rule category.

## Use Score

The **Use Score** option determines whether a score is used when identifying matching candidates. The number of matching candidates that are assigned to the work object is also determined by the rule set filter settings.

## Filter Settings

The filter settings are used in conjunction with some rule categories and the rule set **Use Score** option. The filters allow you to indicate how many matching candidates you want to assign to the work object. When set to **All Above Minimum Score**, all of the matching candidates above a particular score are assigned to the work object. Set the score in the **Minimum Score** field.

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

When the filter is set to **Random**, a random selection of matching candidates is assigned to the work object. When the rule set **Use Score** option is selected, and the filter is set to **Random**, a random selection of matching candidates with the highest scores is assigned to the work object. Use the **Number of Candidates** field to specify how many random matching candidates to assign.

## Rules

One or more rules may be defined for each rule set. Each rule is the distinct set of criteria that's evaluated and candidates or scores that are eligible to assign if the conditions are met. The rule action may apply if all conditions are met, or any conditions are met.

**Note:** You may have resolved duplicate account or contact records to ensure that clean data is available by merging duplicated records into one single record. During the merge process, some account and contact attributes are removed to resolve the duplication. This may impact your account assignment rules where the rule conditions apply to any of the AccountId or ContactId attributes that got deleted during the merge process.

The assignment rule administration allows more than one user at a time to create or update rules that belong to the same or different rule sets or categories. For example, if User A is currently updating assignment rules for the **Sales Lead Resource Rule Category** rule category, then User B can update assignment rules for that same rule category or another rule category at the same time.

**Note:** If you want to rename, delete, or create a rule with the same name as an existing rule, you must click Publish after you make your changes to the existing rule. Only then should you create another rule with the same name to ensure that your changes are live and included in the assignment processing.

## Action

The action set at the rule level determines the action that's performed when a rule is evaluated as true.

If defining rules to assign resources to an object, you can search for and select the specific resources to be assigned when the rule conditions are evaluated as true.

When a matching rule category is selected, for example, Sales Lead Resource Rule Category, the rule action assigns the matching candidates. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule are assigned. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or a random number of matching candidates are assigned (Random).

When a matching rule category and the **Use Score** option are selected, the rule action increases the candidate score by the specified value. If a rule with that action is evaluated as true, the candidates that match the conditions for that rule get the value in the **Action** added to their score. For example, you select Sales Team Member Recommendation Default rule category and the **Action** for one of the rules in that set is **Increase Score By 10**. If that rule is evaluated as true, the resources that match the conditions for that rule get 10 added to their scores. The scores are cumulative, so if any of the resources that matched the conditions in the rule in the example also match the conditions for other true rules in the set, those resources get additional values added to their current score of 10. The filter setting at the rule set level determines whether all matching candidates are assigned (All), or all matching candidates above a specified score are assigned (All Above Minimum Score), or a random selection of matching candidates with the highest scores are assigned (Random), or a number of matching candidates with the highest scores are assigned (Top X).

When a classification rule category is selected, the rule action is **Set Value To** `value Name`. For example, the rule category is **Sales Lead Rule Qualification Rule Category**, the action for one of the rules in that set is **Set Value to Qualified**. If that rule is evaluated as true, the **Status** for the lead being classified is set to **Qualified**.

When the rule category **Sales Lead Scoring Rule Category** is selected, the rule action is **Increase Score By** `score value`. If a rule with that action is evaluated as true, the value in the action is added to the score of the work object associated with the rule set. For example, if the action for one of the rules in that set is **Increase Score By 20**, and that rule is evaluated as true, the score for the Lead is increased by 20.

**Note:** When you're creating or updating assignment rules, you must click **Save and Publish** to ensure that your changes are live and included in the assignment processing.

### Related Topics

- [What types of assignment rules can I create?](#)

## What types of assignment rules can I create?

Assignment rules are created using rule sets, rules, conditions, and actions. The assignment process uses your rules to evaluate and recommend candidate assignments for specified work objects. This topic provides scenarios to illustrate the different types of rules you can create.

**Note:** When creating an assignment rule that uses a check box field, note that the value of true may be denoted by "Y" or "Yes" or "T". Ensure the check box is clear if you want to denote a false value.

## Create Lead Qualification Rules

In this scenario, you want to create rules to classify leads as qualified if these attributes are set as specified:

- Lead Customer is sales account.
- Lead Product is set to Is Not Blank.
- Lead Score is greater than 150.

To create a rule to classify leads as qualified:

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Leads
  - Task: Manage Sales Lead Assignment Rules
2. Search for and navigate to the assignment configuration setup task for the relevant object:
  - For sales lead and deal assignment, go to the Manage Sales Lead Assignment Rules task. This is the task used as an example in this topic.
  - For the Opportunity functional area assignment, select the Manage Opportunity Assignment Manager Rules task.
3. In the setup task page, select the category for the appropriate assignment flow, in this case **Sales Lead Qualification Rule Category**.
4. Click the **Add Row** icon to create a rule set for the predefined rule category Sales Lead Qualification Rule Category.
5. Create a rule with the three conditions that match the attribute settings for a lead to be considered a qualified lead:
  - Lead Product: Select the lead attribute **Primary Product ID**. Select the **Is Not Blank** operator.
  - Lead Customer: Select the lead attribute **Sales Account Indicator**, and then select the **Equals** operator. Enter the value of **x**.
  - Lead Score: Select the lead attribute **Score**, and then select the **Greater Than** operator. Enter the value of **150**.
6. In the Actions region, select **Qualified** from the **Return the Candidate Value As Qualified** list.

## Create Lead Scoring Rules

In this scenario, you want to create a scoring rule to:

- Increase lead scores by 150 if the lead attribute Lead Time Frame is set to 3 months.
- Increase lead scores by 100 if these attributes for leads are set as specified:
  - Budget Status is Approved
  - Budget Amount is greater than 500000

To create this scoring rule:

1. Create a rule set for the predefined rule category Sales Lead Scoring Rule Category.
2. Create the first rule with the conditions that match the attribute settings you want a lead to have so that 150 is added to its score:



- o Choose the object **Sales Lead** and attribute **Time Frame**, and then select the **Equals** operator. Select **3 months**.
  - o Enter the action **as Increase the Score by 150**.
- 3. Similarly, create your remaining rule for the budget attributes and action to **Increase the Score by 100**.
  - a. Add the first condition: Choose the object **Sales Lead** and attribute **Budget Status**, and then select the **Equals** operator. Select **Approved**.
  - b. Add the second condition: Choose the object **Sales Lead** and attribute **Budget Amount**, and then select the **Greater Than** operator. Enter 500000.
  - c. Enter the action **as Increase the Score by 100**.

## Create Matching Candidate with Scoring Rules

Assign different country specialists to opportunities in some European countries based on the country and the risk level of the Opportunity. To create matching candidate with scoring rules:

1. Create a rule set for the predefined category Sales Lead Resource Rule Category and select the **Use Score** option, the filter type of **All Above Minimum Score**, and the minimum score set to **20**.
2. Create three rules each with conditions:
  - a. Create the first rule with these conditions:
    - Select the object **Opportunity**, and then choose the attribute **Customer Country**. Select the **Equals** operator, and then select **DE**.
    - In the rule action, set **Increase Score By** to **20**.
    - Select and add the appropriate resource.
  - b. Create the second rule with these conditions:
    - Select the object as **Opportunity**, and then choose the attribute name **Customer Country**. Select the **In operator**, and then select **FR** and **UK** as condition values.
    - In the rule action, set **Increase Score By** to **20**.
    - Select and add the appropriate resource.
  - c. Create the third rule with these conditions:
    - Select the object **Opportunity**, choose the attribute name **Risk Level**. Select the **Equals** operator, and then select the value **High**.
    - In the rule action, set **Increase Score By** to **20**.
    - Select and add the appropriate resource.

### Related Topics

- [How do I update existing setup data?](#)

## Example of Using Territory-Based Assignment with Rule-Based Filtering

This topic illustrates using territory-based assignment with rule-based filtering. In this example, you find one or more matching territories and use assignment rules to filter the list of territories assigned to sales leads.

## Scenario

Your company wants to assign new leads to the correct territory. If there is no sales channel identified on an incoming lead, then the application should determine if the lead should go to a partner or remain internal. If the deal is internal, then only the prime territories are assigned. If the deal is pushed to a partner, then a channel manager is also assigned to oversee the deal.

## Transaction Details

Leads are the primary marketing business objects that the assignment engine processes. Territory assignment is the primary means of assigning the appropriate salespeople to the lead. Rule filtering may also be used to filter the territories, for example when the sales channel isn't identified. The rule filtering is performed when the Assignment Rule for Territory-Based Lead Assignment (MKL\_LEAD\_ASSIGNMENT\_RULE) profile option is set to use rule filtering.

In this scenario, the work object is Lead and the candidate object is Territory. The assignment is territory-based. The assignment processing finds one or more matching territories. Assignment processing then uses the rule category defined in the Assignment Rule for Territory-Based Lead Assignment profile option to determine the set of rules to use for the rule filtering.

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

1. Rule for SALES CHANNEL Is not blank
  - a. SalesLead.Sales Channel Is not blank
  - b. Action: Return matching candidates
2. Rule for SALES CHANNEL Is blank, Assign Channel Manager
  - a. Sales Lead.Sales Channel Is blank
  - b. Sales Deal.Deal Size Greater than 1,000,000
  - c. Territory.Territory Type In Partner, Sales Channel Manager
  - d. Action: Return matching candidates
3. Rule for SALES CHANNEL Is blank, Assign Prime
  - a. Sales Lead.Sales Channel Is blank
  - b. Sales Deal.Deal Size Lesser than 1,000,000
  - c. Territory.Territory Type Equals Prime
  - d. Action: Return matching candidates

When the lead comes in, it must be assigned to a territory for follow-up. Based on the SALES CHANNEL rules, territory-based assignment can determine if the lead is a smaller deal that can be handled by your partners (and a Sales Channel Manager to oversee), or whether it's a larger deal that must be followed up by the internal sales force.

## Assignment Results

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

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

# Assignment Using Access Groups

## Overview of Access Groups

Use access groups to provide sales resources with additional access to sales object data. Access groups are an alternative way of granting data permissions to users, and they use a different access path provided by the predefined data security policies.

An access group uses the access control list model. You create an access group and assign users to it. All group members are given access to standard or custom object data. You define object sharing rules that provide users with access to the specific records of an object. These rules specify the type of access to be provided and the conditions under which the access is provided. For example, users might be granted access to:

- All opportunities with a status of Open
- All accounts where country is set to UK

You can also define the type of data access provided, for example, Full access or Read access.

A user can be assigned to one or more access groups. In this case, the user has the access assigned to each group. So if Lisa Jones is assigned to Access Group A, which provides access to opportunities, and to Access Group B, which provides access to Accounts, she receives the access provided by both groups. You can also use one access group to assign access to multiple objects.

For more information about access groups, see the Access Groups chapter in the *Securing CX Sales and Fusion Service* guide.

### *Related Topics*

# Assignment with User-Defined Objects

## User-Defined Assignment Features

Assignment processes assign salespeople and their territories to core sales objects, such as opportunities and leads, using territory dimensions or assignment rules.

You can configure user-defined assignment flows to assign user-defined objects or to perform additional or alternate assignment processing on standard objects.

**Note:** In the context of assignment, "user-defined" objects are those objects you create using the configuration tool, Application Composer.

## User-Defined Assignment Key Features

User-defined assignment lets you:

- Assign the appropriate resource or group quickly and efficiently using assignment rules.
- Use a simple approach to define the criteria that matches rule values with resources or territories.
- Assign territories to user-defined objects with assignment rules.
- Define rules that match fields on business objects with fields on territories and resource objects. Or, define rules where fields contain specific values. These fields and business objects can be both user-defined and standard.
- Define assignment rules to calculate a score for an object or set the value of a specific field if certain conditions are met.
- Automatically assign new records.
- Run assignment processes from within the applications.
- Use the Perform Assignments batch assignment process to assign user-defined object records in bulk.

**Note:** If you make user-defined assignment workflow or trigger configuration changes in a sandbox, you must publish the sandbox for your changes to take effect. This is expected behavior, since the assignment job is executed by an internal user. See the topic, [How to Publish Assignment Information](#), for details.

## User-Defined Territory Assignment Considerations

If you use user-defined assignment flows to assign territories to user-defined objects, consider these points:

- You can assign territories to user-defined objects using rule-based assignment. Territory-based assignment isn't supported.
- You can't use territory coverage, such as geography or product, in the assignment processing of territories to a user-defined object. Instead, you must use the standard fields on a territory, such as name, number, or owner, along with any user-defined fields. Assignment processing uses the standard fields on a territory, in addition to using the standard and user-defined fields on the user-defined object.
- Oracle recommends that you use the Territories feature to create and maintain territories, so that the latest active territory details are available.

### Related Topics

- [User-Defined Assignment Features](#)

## Publish Assignment Changes

### How to Publish Assignment Information

Assignment processing uses only published assignment configurations and rules. Therefore, any time you change assignment configurations or rules, you must publish the changes.

For example, if you add a new sales lead assignment rule but don't publish the changes, then the next time assignment processing occurs, the assignment processing will skip the new rule.

You publish assignment information in the following ways:

- Publish from an application's assignment setup pages in Setup and Maintenance. For example, publish in the Manage Sales Lead Assignment Rules page or the Manage Sales Assignment Manager Objects page.
- Run the scheduled process Perform Assignment Data Publish, Refresh, and Synchronization.

Oracle recommends that you publish assignment information when you:

- Update the assignment configuration, which includes assignment objects, attributes, and mappings.
- Create or update assignment rules where the changes are infrequent or there is only a small number of assignment rules.
- Create user-defined objects or fields that you're going to use in assignment.

## Publish Data Using the Assignment Setup Pages

You can publish assignment data from any of the assignment objects and assignment rules setup pages, such as Manage Customer Center Assignment Objects or Manage Sales Lead Assignment Rules.

After you create or update assignment data or rules, in the applicable setup page, click **Save and Publish** to publish assignment information and make it available for use in assignment processing. Clicking the save and publish button submits the process that publishes assignment configuration and rules information. To monitor the status of the publish process, click the refresh icon next to the Last Published text in the page.

If you make updates to assignment data or rules and don't publish, a warning icon appears next to the Last Published text. If the publish process fails, the warning icon remains next to this text.

## Publish Data Using the Publish Assignment Information Process

You can run the Perform Assignment Data Publish, Refresh, and Synchronization scheduled process to publish assignment information. You can schedule this process daily, weekly, and so on, based on the frequency of changes to assignment information, including assignment rules. Consider how often the assignment data will change and how critical it's to have these changes available for use in assignment.

You can use the publish assignment information process when there are a large number of assignment rules (about 100 to 1000) and when there are multiple users making changes to rules at the same time.

To run this process:

1. Click **Navigator > Scheduled Processes**.
2. Click the **Schedule New Process** button.
3. On the Schedule New Process window, select **Perform Assignment Data Publish, Refresh, and Synchronization** process from the **Name** list, and click **OK**.
4. On the Process Details page, select the application from the **Application** list.
5. Select the **Publish** check box.

**Note:** The **Candidate Object** and **Owner Module** fields don't apply to this process.

6. Click **Submit**.

This process publishes all assignment information for the selected application so that it's available for use in assignment processing. You can use the Scheduled Processes page to monitor this process and to view the log file.

### Related Topics

- [How You Refresh Assignment Candidate Cache](#)

## Account Assignment

### Overview of Account Assignment

An account represents a company or person you sell to. If your business sells to a contact or household, an account represents the contact and household you sell to.

Assignment manager lets you assign territories related to your sales accounts, including customers, prospective customers, individual contacts, and households. You can use assignment rules defined for accounts only to filter the territories that are assigned to accounts.

Predefined business events, such as Organization Created or Organization Updated, may impact the performance of account assignment processes if the profile option that controls those business events is enabled. For more information, see the topic [How You Monitor Your Import Activities](#), in the Oracle CX Understanding Import and Export Management for CX Sales and Fusion Service guide.

### Multiple Classification Types

#### Enable Multiple Classification Types

You can enable multiple organization types and industries classification types for account assignment. While you can specify multiple industries for each account, the application only uses only the primary industry for assignment. Use this procedure to enable assignment on all of the industries.

For example, Oracle Corp. is primarily a software supplier, but also manufactures hardware. After you complete the setup, you can assign the account using both industry categories.

Assignments are run on an account based on classifications and includes these tasks.

- Using multiple organization types for account assignment.
- Using multiple industries classification for account assignment.
- Running assignment manager on an account.

**Note:** Before you start these procedures, you must ensure that the **Organization Types** and **Industries** fields are shown on the Profile tab of the Accounts page.

#### Use Multiple Organization Types for Account Assignment

1. Go to the Setup and Maintenance work area.
2. Search for the **Manage Customer Center Assignment** task.
3. Select the **Account** row.
4. Select the **Candidates** tab of the **Account: Details** table and then the **Account Territory** row.

This row contains mapping information about the account.

5. Select the **Account Territory: Mapping Sets** tab.

This tab shows the organization type and industries type.

6. Select the row corresponding to **Organization Type** in the Work Object Attribute Low column and click **Edit**.

The Edit Mapping Page opens where you can edit the organization mapping to update the work object.

Use default values for fields unless the steps specify other values.

| Field                      | Value                     |
|----------------------------|---------------------------|
| Work Object                | Account Organization Type |
| Work Object Attribute: Low | Code Assignment           |

7. Ensure that the Inactive check box is clear, so that the mapping remains active.

8. Click **OK** to save the changes.

9. Verify that your updates are active by reviewing the Mapping Sets tables.

The values of the specific dimension that you have enabled using the multiple values for assignment, instead of the primary value, should be **Code Assignment**.

10. Click **Save and Publish**.

Your changes are published and future territory assignment for accounts is performed using the mapping sets.

## Use Multiple Industries Classification for Account Assignment

1. Select the row corresponding to **Industry** in the Work Object Attribute Low column and click **Edit**.

The Edit Mapping page opens where you can edit the industry mapping to update the work object.

Use default values for fields unless the steps specify other values.

| Field                      | Value            |
|----------------------------|------------------|
| Work Object                | Account Industry |
| Work Object Attribute: Low | Code Assignment  |

2. Ensure that the Inactive check box is clear, so that the mapping remains active.

3. Click **OK** to save the changes.

4. Verify that your updates are active by reviewing the Mapping Sets tables.

The values of the specific dimension that you have enabled using the multiple values for assignment, instead of the primary value, should be **Code Assignment**.

5. Click **Save and Publish**.

Your changes are published and future territory assignment for accounts is performed using the mapping sets.

## Run Assignment Manager on an Account

1. Go to the Accounts list page.
2. Search for the Maple Networks account for which you want to run the assignments based on the mappings.
3. Select the row corresponding to Maple Networks.

You are in the Edit Accounts: Maple Networks page.

4. Go to the Profile tab.
5. Click **Industries**.

You are in the Manage Industries page.

6. Click **Add**.
7. Enter Financial Services in the Name field and click **Search**.
8. Select the row corresponding to the Financial Services industry.
9. Click **OK** on the Select: Industry page, and then again on the Manage Industries page.
10. Click **Save** on the Edit Account page.

Saving your changes automatically triggers the assignment process and the account is assigned territories based on the mapping sets.

# Territory-Based Account Assignment

## Overview of Territory Account Assignment

Territory-based assignment is the default approach used to give sales people and their managers access to account, contacts and households.

Account assignment is based on the matching of sales account attributes with sales territory dimensions. For example, you can add an account owner to the account-territory matching to enable the assignment of a territory based on the account owner.

By default accounts are assigned automatically when the account is created or updated. Alternatively, sales people with access to the account team can run assignment for a specific account. Additionally, account assignment can run in bulk on a scheduled basis. You can also add an account owner to the account territory mapping that enables the application to assign a territory based on the account owner's territory. For example, if the account owner is mapped to the territory owner, then when you create an account, you're made the account owner

## Multiple Industry and Organization Classifications

Opportunity and Lead assignment also supports multiple classification values. For more information on assigning opportunities and leads using industry classification codes, see the white paper, *Assignments Using Nonprimary Classifications* (Doc ID 2086014.1) available on My Oracle Support.

## Sales Account Assignment Child Objects

Here's a list of sales account assignment child objects:



| Sales Account Assignment - Child Objects | Description                                                                                                                                                                                         |
|------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account                                  | Represents a company you sell to<br><br>An account represents a company you sell to. If your business sells to a contact or household, an account represents the contact and household you sell to. |
| Account Auxiliary Classification 1       | Multiple auxiliary classification codes associated with the account<br><br>Select this child object to enable account assignment by all account auxiliary classification 1 values.                  |
| Account Auxiliary Classification 2       | Multiple auxiliary classification codes associated with the account<br><br>Select this child object to enable account assignment by all account auxiliary classification 2 values.                  |
| Account Auxiliary Classification 3       | Multiple auxiliary classification codes associated with the account<br><br>Select this child object to enable account assignment by all account auxiliary classification 3 values.                  |
| Account Industry                         | Multiple industries associated with the account<br><br>Select this child object to enable account assignment by all account industry types.                                                         |
| Account Organization Type                | Organization type classification code assigned to the account<br><br>Select this child object to enable account assignment by all account organization types.                                       |

## Sales Account Assignment Object Attributes and Corresponding Customer Attributes

Here's a list of sales account assignment object attributes and corresponding customer attributes, as shown on the Profile and Classification nodes of the respective information tree.

| Sales Account Assignment Object Attribute | Corresponding Sales Attribute                                                                                                                                            |
|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Geography Identifier                      | Sell-to Address                                                                                                                                                          |
| Industry                                  | Primary Industry: The primary classification code for the classification category defined in profile option Industry Classification Category.                            |
| Organization Type                         | Primary Organization Type: The primary classification code for the classification category Organization Type defined in profile option Industry Classification Category. |
| Organization Size                         | Organization Size                                                                                                                                                        |
| Named Account Type                        | Named Sales Account Indicator                                                                                                                                            |
| Party ID                                  | Party ID                                                                                                                                                                 |

| Sales Account Assignment Object Attribute | Corresponding Sales Attribute                                                                                                                         |
|-------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------|
| Auxiliary Dimension 1                     | The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 1. |
| Auxiliary Dimension 2                     | The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 2. |
| Auxiliary Dimension 3                     | The primary classification code for the classification category defined in profile option Industry Classification Category for Auxiliary Dimension 3. |

#### Related Topics

- [Considerations for Configuring Assignment](#)
- [Examples of Creating Assignment Mappings](#)
- [Overview of Accounts, Contacts, and Households](#)

## Assign Primary and Nonprimary Classifications

As a sales administrator, you have the ability to configure account assignment to enable primary and nonprimary industry codes, organization types, and classification values.

### Enabling Organization Type and Industry Classification Values

To enable the organization type and industry classification values:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Customer Center Assignment Object
3. Click the **Manage Customer Center Assignment Object** link.  
The Manage Customer Center Assignment Object page appears.
4. Select the **Account** object.
5. In the Account: Details region, select the **Candidates** tab and then select **Account Territory**.
6. Select the **Account Territory: Mapping Sets** tab.
7. In the Mappings region, select the work project.
8. Click **Edit**.  
The Edit Mapping pane appears.
9. Make the required changes and click **OK**.
10. Click **Save and Publish** to activate the mapping to enable assignment by all classification values.

## Improve the Performance for Territory-Based Account Assignment

Assignment manager lets you assign territories related to your sales accounts, including customers, prospective customers, individual contacts, and households. To optimize the performance of assigning sales representatives

to these sales territories, you can choose to select an enhanced mode of processing for territory-based account assignment.

This performance enhancement is specific to territory-based account assignment only. There's no performance impact on other business objects such as Leads, Opportunity, Partner, or any rule-based assignment activities.

If you have permission to configure offerings, then you can use the New Features page to opt in to these two features:

- Optimize Performance for Territory Based Assignment
  - Optimize Performance in Accounts, Contacts, and Households
1. Select the **Change Feature Opt In** from the **Sales Foundation** functional area and open the **Edit Features: Sales Foundation** page.
  2. Locate the **Optimize Performance in Territory-Based Assignment** feature and expand to display the **Optimize Performance in Accounts, Contacts, and Households**.
  3. Select the **Enable** check box for both of these features and click Done.

For more information, see the New Feature Opt-In section of the Oracle Applications Cloud - Using Functional Setup Manager guide on the Oracle Help Center ([docs.oracle.com](https://docs.oracle.com)). When you run your next Territory-Based Account Assignment, note the significant performance improvements after using the enhanced mode of processing.

**Note:** While the performance for territory-based account assignment is enhanced by enabling this Opt-In feature, custom post-processing tasks may be impacted. For example, any custom task flows, Groovy scripts, or event notifications won't get triggered.

## Modify Sales Account Assignment to Assign Partner Type Territories

As a sales administrator, you can configure account assignment to assign partner type territories.

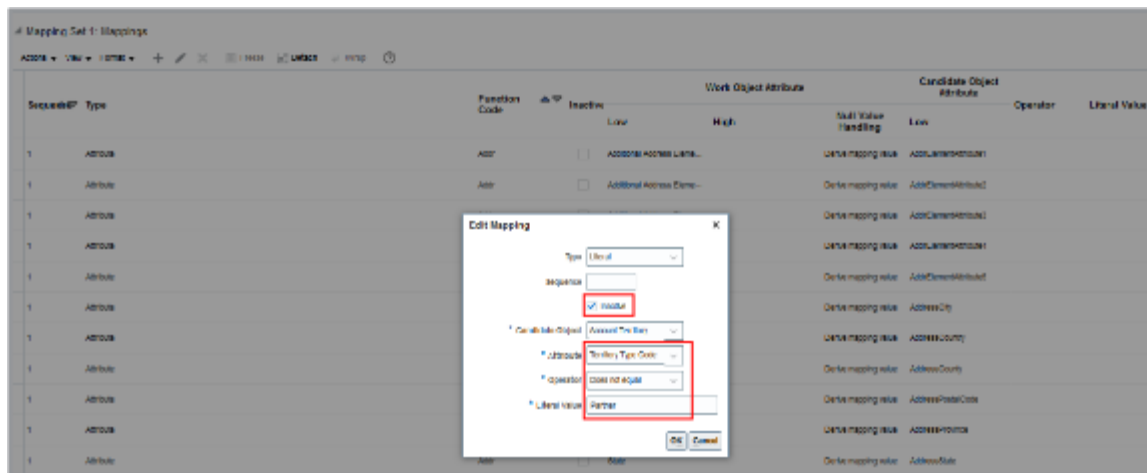
To assign partner type territories for account assignment, you must deactivate the **Territory Type Code** attribute as follows:

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Customer Center Assignment Object
3. Click the **Manage Customer Center Assignment Object** link.

The Manage Customer Center Assignment Object page appears.

4. Select the **Account** object.
5. In the Account: Details region, select the **Candidates** tab and then select **Account Territory**.
6. Select the **Account Territory: Mapping Sets** tab.

7. Select the row corresponding to **Territory Type Code** in the Candidate Object Attribute Low column and click **Edit**. The Edit Mapping Page opens where you can edit the Territory Type Code mapping to update the candidate object.



8. Ensure that the **Inactive** check box is selected, so that the mapping isn't active.
9. Click **OK**.
10. Click **Save and Publish** to deactivate the mapping.

## Overview of Account Assignment Profile Options

The following profile options influence the behavior of sales account assignment:

| Profile Option Display Name                                           | Default Value | Effect                                                                                                                                                                  |
|-----------------------------------------------------------------------|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assignment Rule for Account Territory Assignment                      | Null          | Specifies the assignment rule that defines the sales territory that's assigned to an account.                                                                           |
| Account Types Enabled for Assignment                                  | ZCA_CUSTOMER  | Enables one or more account types for territory assignment. Applicable types are Account Type standard lookup values. Use comma-delimited string for multiple values.   |
| Sales Account Automatic Assignment on Import Enabled                  | N             | Enables automatic territory based assignment after sales accounts are imported. If disabled, manually run a batch assignment or assign each sales account individually. |
| Disable updating Last Assign Date when there are no territory changes | N             | Disables Stamping of Last Assign Date when there are no territory changes.                                                                                              |
| Sales Account Automatic Assignment on Create Enabled                  | Y             | Enables automatic territory based assignment processing after a sales account is created.                                                                               |
| Sales Account Automatic Assignment on Update Enabled                  | Y             | Enables automatic territory based assignment processing after a sales account is updated.                                                                               |

## Account Territory Member Access

Access for the territory owners and members are the same as that of the team members.

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

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

**Note:** You must implement Territory Management before you can access territory owners.

### Related Topics

## Account Assignment Scheduled Processes

### Schedule Account Assignment

The Request Account Assignments scheduled process can be scheduled and run on the Scheduled Processes page. You must have the Run Sales Party Batch Assignment privilege to define and run account batch assignment.

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

1. Click **Schedule New Process**, then click type **Job**.
2. Select the process named **Request Account Assignment**. If needed, use the Search link on the Search window.
3. Enter your process details. The following table shows the view criteria and its description, as well as any bind values that are required.
  - **Work Object:** SalesAccount\_Work\_Object
  - **Candidate Object:** SalesAccountTerritory\_Candidate\_Object
  - **Assignment Mode:** Territory
  - **View Criteria Name:** (as shown in the following table)
  - **View Criteria Bind Values:** (as shown in this table)

| View Criteria Name          | View Criteria Description                                                                                                                                                                                                                                    | View Criteria Bind Values                 | Recommended Run Frequency |
|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------|---------------------------|
| SalesAccountsUpdatedSinceVC | Use this view criteria to assign accounts which haven't been previously assigned and have LAST_UPDATED_DATE is greater than or equals the specified date and (LAST ASSIGNED DATE is empty or LAST ASSIGNED DATE is less than or equal to the specified date. | BindLastUpdateDate= [YYYY-MM-DD HH:MM:SS] | Daily                     |

| View Criteria Name                 | View Criteria Description                                                                                                                                                                                                                                                                       | View Criteria Bind Values                                 | Recommended Run Frequency               |
|------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------|-----------------------------------------|
|                                    |                                                                                                                                                                                                                                                                                                 |                                                           |                                         |
| SalesAccountsAssignedBeforeVC      | Use this view criteria to reassign accounts which have been previously assigned and have <b>LAST_ASSIGNED_DATE</b> (in the <b>ZCA_SALES_ACCOUNTS</b> table) less than the specified date.                                                                                                       | BindLastAssignedDate= [YYYY-MM-DD]                        | Daily                                   |
| SalesAccountTerritoryBatchReassign | Use this view criteria to reassign accounts impacted by the specified territory and territory dimensional realignment batch.<br><br>This view criteria is also used internally to initiate immediate/automatic assignments after territory proposal activation and territory dimension updates. | BindReassignmentBatchId=[Territory Reassignment Batch ID] | Ad hoc run as per business requirements |
| SalesAccountBulkImportVC           | Use this view criteria to assign accounts created in a given customer import batch.<br><br>This view criteria is also used internally to initiate immediate/automatic assignments after customer import.                                                                                        | BindReassignmentBatchId=[Import Activity ID]              | Ad hoc run as per business requirements |
| SalesAccountDimsForPartyVC         | Use this view criteria to assign the account with the specified account ID.                                                                                                                                                                                                                     | BindPartyId= [Sales Account ID]                           | Ad hoc run as per business requirements |

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

#### Related Topics

- [Examples of Creating Assignment Mappings](#)
- [How You Refresh Assignment Candidate Cache](#)
- [How can I add territories to an account?](#)
- [When are territories assigned to accounts?](#)

# Opportunity Assignment

## About Sales Resources and Opportunity Assignment

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

The following sections discuss different ways to assign sales resources to an opportunity.

### Scheduled Processing

The preferred way to assign sales resources to an opportunity is using a scheduled process, also known as a batch process or batch method. There are two predefined scheduled processes for opportunity assignment as follows:

- **Request Revenue Territory Assignment:** Use this process to run territory-based assignment on opportunity product lines. During this process, the application evaluates every product line in the opportunity batch. Territories whose dimensions match the dimensional attributes of a given product line are then assigned to that line.
- **Request Opportunity Resource Assignment:** Use this process to run rule-based assignment on opportunities. During this process, assignment processing executes a set of rules, as defined in the profile option, Sales Team Member Assignment Rule Set Group, to find matching candidates for opportunities. If matching candidates are found, they're added to the opportunity team. Note that team members for whom lock assignment is disabled will be replaced if they no longer match the assignment rules.

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

### Manually Assigning and Re-assigning

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

### Real Time Assignment Processing Action

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

### Automatic Assignment On Saving an Opportunity

If the profile option, Assignment Submission at Save Enabled, is yes, when you save an opportunity, assignment processing runs assignment on the opportunity. In a similar way that on-demand assignment happens, assignment processing uses territory-based assignment, rule-based assignment, or both, based on the profile option, Opportunity Assignment Mode.

*Related Topics*

- [What's lock assignment?](#)
- [Opportunity Team Profile Options](#)
- [Recommendations for Assignment Processes for Opportunities](#)
- [Overview of Territory Account Assignment](#)

## Territory-Based Opportunity Assignment

### Set Opportunity Assignment Profile Options

Whether you're using territory-based assignment or rule-based assignment or both to assign resources to opportunities, initially in your implementation you should validate the setting of the following two profile options: Opportunity Assignment Mode and Assignment Submission at Save Enabled.

#### Set Opportunity Profile Options

Here's how to set opportunity profile options:

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Opportunity Profile Options
2. In the search region of the Manage Opportunity Profile Options page, select **Opportunity Management** as the application, or enter the profile option name directly in the **Profile Display Name** field.
3. In the list that's returned, click the profile option you want to retrieve the details about the profile option.
4. Set the profile option as needed.

These profile options influence the effect of territory-based opportunity assignment:

| Profile Option Display Name               | Default Value                   | Effect                                                                                                                                                                                                                                |
|-------------------------------------------|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Opportunity Assignment Mode               | Territory-based Assignment Only | Specifies the type of assignment processing performed for opportunities. The available options are Territory-based Assignment Only, Rule-based Assignment Only, and Both (which runs both rule based and territory based assignment). |
| Assignment Submission at Save Enabled     | No                              | Specifies whether to run assignment on an opportunity when it's saved in the UI. If you want assignment to run anytime users save an opportunity, set the profile option to <b>Yes</b> .                                              |
| Territory Based Resource Assignment Style | All                             | Specifies if all members of the territory should be added to an opportunity team or just the owner. Or, if all (owner and members of                                                                                                  |



| Profile Option Display Name                 | Default Value | Effect                                                                                                                                                                                                                                                                                                                                                                                             |
|---------------------------------------------|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                             |               | the territory) should be excluded from the opportunity team.<br><br><b>Note:</b><br>The <b>Lock Assignment</b> check box, if selected, takes precedence and prevents a salesperson from being automatically removed from an opportunity through the assignment engine. Only users with Full access on the opportunity can select or deselect the Lock Assignment check box for sales team members. |
| Territory-Based Assignment Rule Category    | None          | Specify the rule category used for rule filtering during opportunity territory-based assignment.                                                                                                                                                                                                                                                                                                   |
| Opportunity Resource Deal Protection Period | 0             | Specifies the default number of days that territory resources are protected to stay on a deal, even if ineligible through territory realignment.                                                                                                                                                                                                                                                   |

#### Related Topics

- [About Sales Resources and Opportunity Assignment](#)
- [Opportunity Team Profile Options](#)
- [Run Territory Assignment Process for Opportunities](#)
- [How do I update existing setup data?](#)

## Opportunity Team Profile Options

You set profile options to specify the default function and access levels for both internal and partner resources that you want added to the sales team for opportunities.

### Opportunity Team Profile Settings

This table lists the profile options that affect opportunity team assignment and other team functionality.

| Profile Option Display Name                       | Default Value | Effect                                                                                         |
|---------------------------------------------------|---------------|------------------------------------------------------------------------------------------------|
| Internal Resource Sales Team Access Level Default | Edit          | Determines the default access level for an internal resource added to the sales team.          |
| Internal Resource Sales Team Function Default     | Integrator    | Determines the default function for an internal resource added to the sales team.              |
| Partner Resource Sales Team Access Level Default  | No Access     | Determines the default access level for partner resources added to the opportunity sales team. |

| Profile Option Display Name                  | Default Value | Effect                                                                                     |
|----------------------------------------------|---------------|--------------------------------------------------------------------------------------------|
| Partner Resource Sales Team Function Default | Integrator    | Determines the default function for partner resources added to the opportunity sales team. |

#### Related Topics

- [About Sales Resources and Opportunity Assignment](#)

## Set Deal Protection on Opportunities

When a sales territory is assigned to an opportunity product line, the application copies over the territory resources (salespeople) to the opportunity sales team. When territory realignment happens, ineligible territory resources are removed from the sales team, unless you enable deal protection.

You enable deal protection by setting the profile option, Opportunity Resource Deal Protection Period (MOO\_DEAL\_PROTECTION\_PERIOD). The profile option is set to 0 by default.

**Note:** When you set the deal protection profile option, all existing sales team members are protected from realignment for the number of days for which deal protection is in effect.

### Enable Deal Protection

Here's how to enable deal protection.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Opportunity Profile Options
2. From the Search region of the Manage Opportunity Profile Options page, enter **opportunity Resource** in the **Profile Display Name** field.
3. From the MOO\_DEAL\_PROTECTION\_PERIOD: Profile Values region, in the **Profile Value** field, enter the number of days for which you want the deal protection to be in effect. For example, enter 15 if you want the deal protection to be in effect for 15 days.
4. Click **Save and Close**.

#### Related Topics

- [How do I update existing setup data?](#)

## Sales Credit Recipient and Forecast Territory Predefined Logic

The sales application uses rules to set default sales credit recipients and forecast territories. When a product line is first added and saved on an opportunity, the line creator is automatically set as the sales credits recipient at 100 percent.

You can edit the default credit allocation, and you can add additional sales credit recipients as needed.

**Note:** Nonrevenue credit recipients are never set by default and must be added manually.

After opportunity assignment is run, the application processes the existing credit allocations for each assigned product line to ensure that:

- An eligible territory is set as the forecast territory
- The credit recipient is an eligible resource from the forecast territory

**Note:** The revenue or nonrevenue sales credit amounts are automatically rolled into the territory's forecast when the product line is added to the forecast.

## Default Forecast Territory Logic

Here is the logic used by the sales application when setting the default forecast territory:

- Keep the forecast territory the user selected, as long as it's still assigned to the product line and its forecast participation type matches the sales credit type.
- Use the existing credit recipient to derive the forecast territory, whenever possible.

When setting default forecast territory:

- If the current forecast territory for the sales credit is one of the assigned territories with a matching forecast participation type, the application leaves it unchanged.
- If there is only one territory with a matching forecast participation type, the application sets that territory as the forecast territory.
- When there are multiple territories with a matching forecast participation type, the application chooses the forecast territory using the following precedence:
  - Territory where the existing credit recipient is the owner
  - Territory where the existing credit recipient is a member
  - Territory with a matching forecast participation type with the latest effective start date
- When there is no matching territory, the application doesn't set any data value for the forecast territory (this implies that there is a gap in the territory hierarchy). If the forecast territory for a sales credit allocation is set to having no data value (is blank) and opportunity assignment was done from the UI, a warning message appears.

## Default Credit Recipient Logic

Generally, a sales credit recipient selected by the user isn't replaced by the application unless the recipient is no longer a qualified credit receiver. The application doesn't change the recipient if:

- The Lock Owner setting for the revenue item is enabled.
- The current credit recipient is under deal protection.
- The current credit recipient is an owner or member of the forecast territory.

If the preceding criteria aren't met, the application sets the forecast territory owner as the new credit recipient.

*Related Topics*

- [Best Practices for Sales Credits](#)
- [Set Opportunity Revenue Forecast Criteria](#)
- [Set Deal Protection on Opportunities](#)
- [How can I lock in a sales credit recipient?](#)

## Opportunity Assignment Scheduled Processes

### Recommendations for Assignment Processes for Opportunities

You can use two processes for opportunity assignment. You use one for territory-based assignment and one for rule-based assignment.

The two assignment processes related to opportunity assignment are:

- Request Revenue Territory Assignment: Run this process if you're using territory-based assignment.
- Request Opportunity Resource Assignment: Run this process if you're using rule-based assignment.

**Note:** You run processes from the **Scheduled Processes** page, available from the navigator. You must have the role of Sales Administrator or a setup user to run scheduled processes.

When setting up the processes, you must enter specific **View Criteria** names and their **Bind Values**. The following sections list the parameters to use and some examples.

#### Request Revenue Territory Assignment Process

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

| View Criteria Name              | View Criteria Description                                                                                                                                                                                                                                     | View Criteria Bind Values                                                                                                                                                                                                                                                                                                                                                                                 | Recommended Run Frequency |
|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| OpenOpportunitiesByCreationDate | <p>Revenue lines of open opportunities created in the last 90 days.</p> <p><b>Note:</b><br/>The view criteria bind values aren't required for the default date range, 90 days. You can pass a different date range by entering View Criteria Bind Values.</p> | <ul style="list-style-type: none"><li>• BindOpptyCreationDateTo=[date],BindOpptyCreationDateFrom=[date]</li><li>• For example:<br/>BindOpptyCreationDateTo=2015-02-29,<br/>BindOpptyCreationDateFrom=2015-01-01</li><li>• For example:<br/>BindOpptyCreationDateFrom=2015-01-01<br/>This second example processes all open opportunities created between January 1, 2015, and the current date.</li></ul> | Daily                     |

| View Criteria Name                   | View Criteria Description                                                                                                                                        | View Criteria Bind Values                                                                                                                                                                                     | Recommended Run Frequency               |
|--------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|
| OpenOpportunitiesByEffectiveDate     | Revenue lines of open opportunities that have an expected close date in the last 90 days. Optionally, the user can enter a different date range.                 | <ul style="list-style-type: none"> <li>BindEffectiveDateFrom =[date], BindEffectiveDateTo =[date]</li> <li>For example:<br/>BindEffectiveDateFrom =2015-01-01,<br/>BindEffectiveDateTo =2015-02-29</li> </ul> | Daily                                   |
| SalesAccountUpdatedInLastNDays       | Revenue lines of all open opportunities whose sales account was updated in the last 30 days. Optionally, the user can enter a different number of days.          | <ul style="list-style-type: none"> <li>BindSalesAccountUpdated Since=[30]</li> <li>For example, opportunities whose sales account was updated in last 15 days: BindSalesAccount UpdatedSince=15</li> </ul>    | Daily                                   |
| SalesAccountUpdatedInLastNHours      | Revenue lines of all open opportunities whose sales account was updated in the last number of hours. Optionally, the user can enter a different number of hours. | <ul style="list-style-type: none"> <li>BindSalesAccountUpdatedSince</li> <li>For example, opportunities whose sales account was updated within last 6 hours: BindSalesAccount UpdatedSinceHours=6</li> </ul>  | Multiple times per day                  |
| OpenOpportunitiesUpdatedInLastNHours | Revenue lines of all open opportunities updated within the last four hours. Optionally, the user can enter a different number of hours.                          | <ul style="list-style-type: none"> <li>BindOpptyUpdatedWithinHours</li> <li>For example, open opportunities updated within the last 6 hours: BindOpptyUpdatedWithin=6</li> </ul>                              | Multiple times per day                  |
| OpenOpportunitiesUpdated InLastNDays | Revenue lines of all open opportunities updated in the last 30 days. Optionally, the user can enter a different number of days.                                  | <ul style="list-style-type: none"> <li>BindOpptyUpdatedSince =[30]</li> <li>For example, open opportunities updated in last 15 days: BindOpptyUpdated Since=15</li> </ul>                                     | Daily                                   |
| FilterByBatchTag                     | Revenue lines of all open opportunities that contain a specific value in the Batch Tag field.                                                                    | <ul style="list-style-type: none"> <li>BindBatchTag =[text]</li> <li>For example, open opportunities that have EMEA in the Batch Tag field: BindBatchTag =EMEA</li> </ul>                                     | Ad hoc run as per business requirements |
| RevenueImportCriteria                | Revenue lines of all opportunities imported through the given bulk import batch ID. The view criteria bind value, BatchId, is mandatory.                         | <ul style="list-style-type: none"> <li>BindBatchId</li> <li>For example:<br/>BindBatchId=5618782</li> </ul>                                                                                                   | Ad hoc run as per business requirements |
| FilterByOpptyNumber                  | Revenue lines of an opportunity with a specific number.                                                                                                          | <ul style="list-style-type: none"> <li>BindOpptyNumber=&lt;number&gt;</li> <li>BindOpptyNumber=17001</li> </ul>                                                                                               | Ad hoc run as per business requirements |

| View Criteria Name                 | View Criteria Description                                                                                                 | View Criteria Bind Values                                                                                                                                                                                                 | Recommended Run Frequency |
|------------------------------------|---------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| ClosedOpportunitiesByCreationDate  | Revenue lines of closed opportunities created in the last 90 days. Optionally, the user can enter a different date range. | <ul style="list-style-type: none"> <li>BindOptyCreationDateTo =[date], BindOptyCreationDateFrom =[date]</li> <li>For example:<br/>BindOptyCreationDateTo =2015-02-29,<br/>BindOptyCreationDateFrom =2015-01-01</li> </ul> | Daily                     |
| ClosedOpportunitiesByEffectiveDate | Revenue lines of opportunities closed in the last 90 days. Optionally, the user can enter a different date range.         | <ul style="list-style-type: none"> <li>BindEffectiveDateFrom =[date], BindEffectiveDateTo =[date]</li> <li>For example:<br/>BindEffectiveDateFrom =2015-01-01,<br/>BindEffectiveDateTo =2015-02-29</li> </ul>             | Daily                     |

## Request Opportunity Resource Assignment Process

This table identifies the view criteria and view criteria bind values available for the opportunity resource rule-based assignment process.

| View Criteria Name              | View Criteria Description                                                                                                   | View Criteria Bind Values                                                                                                                                                                                                                                                                                                                | Recommended Run Frequency               |
|---------------------------------|-----------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|
| OpenOpportunitiesUpdatedInLastN | All open opportunities which were updated in the last 30 days. Optionally, the user can enter a different number of days.   | <ul style="list-style-type: none"> <li>BindOptyUpdatedSince=[30]</li> <li>For example, opportunities updated in last 15 days:<br/>BindOptyUpdatedSince=15</li> </ul>                                                                                                                                                                     | Daily                                   |
| OpenOpportunitiesUpdatedInLastN | All open opportunities updated within the last number of hours. Optionally, the user can enter a different number of hours. | <ul style="list-style-type: none"> <li>BindOptyUpdatedWithinHours</li> <li>For example, open opportunities updated within the last 6 hours:<br/>BindOptyUpdated Within=6</li> </ul>                                                                                                                                                      | Multiple times per day                  |
| OpportunityForImportBatchVO     | All opportunities imported through the given bulk import batch ID. Value for BatchId is mandatory.                          | <ul style="list-style-type: none"> <li>BindBatchId</li> <li>For example:<br/>BindBatchId=5618782</li> </ul>                                                                                                                                                                                                                              | Ad hoc run as per business requirements |
| OpenOpportunitiesByCreationDate | Open Opportunities created in the last 90 days. Optionally, the user can pass a different date range.                       | <ul style="list-style-type: none"> <li>BindOptyCreation DateTo [date], BindOptyCreation DateFrom [date]</li> <li>For example:<br/>BindOptyCreation DateTo=2015-02-29,<br/>BindOptyCreation DateFrom=2015-01-01 or<br/><br/>BindOptyCreation DateFrom=2015-01-01. This second example processes all open Opportunities created</li> </ul> | Daily                                   |

| View Criteria Name                 | View Criteria Description                                                                                                                     | View Criteria Bind Values                                                                                                                                                                                               | Recommended Run Frequency               |
|------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------|
|                                    |                                                                                                                                               | between January 1, 2015 and the current date.                                                                                                                                                                           |                                         |
| OpenOpportunitiesByEffectiveDate   | Open opportunities that have an expected close date in the last 90 days. Optionally, the user can pass a different date range.                | <ul style="list-style-type: none"> <li>BindEffective DateFrom [date], BindEffective DateTo[date]</li> <li>For example: BindEffective DateFrom=2015-01-01, BindEffective DateTo=2015-02-29</li> </ul>                    | Daily                                   |
| SalesAccountUpdatedInLastNHours    | All open opportunities whose sales account got updated within the last four hours. Optionally, the user can pass a different number of hours. | <ul style="list-style-type: none"> <li>BindSalesAccountUpdatedSince [hours]</li> <li>For example, opportunities whose sales account was updated within the last 6 hours BindSalesAccount UpdatedSinceHours=6</li> </ul> | Multiple times per day                  |
| SalesAccountUpdatedInLastNDays     | All open opportunities whose sales account got updated in the last 30 days. Optionally, the user can pass a different number of days.         | <ul style="list-style-type: none"> <li>BindSalesAccountUpdated Since [30]</li> <li>For example, opportunities whose sales account was updated in last 15 days: BindSalesAccount UpdatedSince=15</li> </ul>              | Daily                                   |
| OpportunitySearchbyOpptyNumber     | The opportunity with a specific number.                                                                                                       | <ul style="list-style-type: none"> <li>BindOpportunityNumber=&lt;number&gt;</li> <li>BindOpportunityNumber=1700</li> </ul>                                                                                              | Ad hoc run as per business requirements |
| ClosedOpportunitiesByCreationDate  | Closed opportunities created in the last 90 days. Optionally, the user can pass a different date range.                                       | <ul style="list-style-type: none"> <li>BindOpptyCreation DateTo [date], BindOpptyCreation DateFrom [date-90]</li> <li>For example: BindEffective DateFrom=2015-01-01, BindEffective DateTo=2015-02-29</li> </ul>        | Daily                                   |
| ClosedOpportunitiesByEffectiveDate | Revenue lines of opportunities closed in the last 90 days. Optionally, the user can enter a different date range.                             | <ul style="list-style-type: none"> <li>BindEffectiveDateFrom =[date], BindEffectiveDateTo =[date]</li> <li>For example: BindEffectiveDateFrom =2015-01-01, BindEffectiveDateTo=2015-02-29</li> </ul>                    | Daily                                   |

## Opportunity Assignment Implementation Considerations

Consider these points when scheduling opportunity batch assignment processes:

- Multiple Revenue Territory Territory Based Assignment and Opportunity Resource Rule Based Assignment processes can't run at the same time. If one of the processes is running and you submit another process (either Revenue Territory Territory Based Assignment or Opportunity Resource Rule Based Assignment), then the

second process has a Paused status until the first job completes. Once the first process completes, the second process starts.

- For date-based view criteria, for example, `OpenOpportunitiesByEffectiveDate`, you don't have to enter the view criteria bind values if the default date range is used.
- For number-of-days-based view criteria, for example, `OpenOpportunitiesUpdatedInLastNDays`, you don't have to enter the view criteria bind values if the default number of days is used.
- If you enter view criteria bind values, the date format is YYYY-MM-DD.
- When scheduling opportunity batch assignment processes for the first time, if a process errors, you can try rescheduling the process and entering a lower value for the Maximum Sub Processes per Process parameter. The default value is 10. This ensures that each batch contains a small number of opportunities or revenue lines. If there's an issue with one of the opportunities or revenue lines, then the appropriate subprocess contains an error status and the other subprocesses completes successfully.

For more information on opportunity assignment, see the help. Use keywords "assignment", "territory-based assignment", and "rule-based assignment".

## Run Territory Assignment Process for Opportunities

The batch process, Request Revenue Territory Assignment, evaluates opportunity revenue lines and matches eligible territories and their salespeople to the revenue lines. Use the procedures in this topic to run the process and monitor its success.

### Prerequisites

Here are the prerequisites to successfully assign resources to opportunities using this process:

- The organization hierarchy exists with valid resources.
- Live territories exist.
- Open opportunities exist with open revenue lines.
- Territory attributes match attributes of open opportunity revenue lines.
- The profile option, Opportunity Assignment Mode, is set to either Territory-Based Only or Both (not Rule-Based Assignment).
- You run the process as a user with the Sales Administrator job role.

### Find the Process

Here's how to find the process:

1. Navigate to **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process window, click the drop-down list next to the **Name** field and click **Search**.
4. In the Search dialog, enter the name of the process name, `Request Revenue Territory Assignment`, and click **Search**.
5. Select the process name that you want in the results that are returned and click **OK**.
6. Click **OK** again, if needed.
7. The Process Details window appears, where you will enter parameters using the steps in the next section, Enter Process Parameters.



## Enter Process Parameters

Enter the process parameters in the Parameters tab of the Process Details window. The process parameters are called "view criteria" in the UI.

Since there are many different options when setting up the view criteria, here we are going to use a simple view based on opportunity creation date. When entering the data, remember that the values are case sensitive, and no spaces are used.

1. In the **View Criteria Name** field, enter `OpenOpportunitiesByCreationDate` as shown in this figure.

The screenshot shows the 'Process Details' window with the 'Parameters' tab selected. The 'View Criteria Name' field is highlighted with a red asterisk and contains the text 'OpenOpportunitiesByCreationDate'. Other fields include 'View Criteria Bind Values' with the value 'BindOpptyCreationDateFrom=2014-01-01', 'Number of Work Objects per Sub Process' set to 1000, 'Maximum Sub Processes per Process' set to 10, 'Metrics Logging Interval' set to 100, 'Refresh Forecast Automatically' set to Yes, and 'Diagnostic Mode' which is unchecked. The window title is 'Process Details' and there is a close button (X) in the top right corner. A message at the top states 'This process will be queued up for submission at position 59'. Buttons for 'Process Options', 'Advanced', 'Submit', and 'Cancel' are visible at the top right.

2. In the **View Criteria Bind Values** field, enter `BindOpptyCreationDateFrom=2014-01-01`. This value captures all open opportunities created since January 1, 2014. The format must be yyyy-mm-dd.
  - o To specify a date range, enter `BindOpptyCreationDateFrom=<date>, BindOpptyCreationDateTo=<date>`. Note the From and To values are separated by a comma.
  - o Leave the field blank to capture opportunities in the default date range, the past 90 days.
3. For the purposes of this example, leave the remaining fields at their default values.
4. Next, schedule the process to run, as described in the next section, Schedule the Process.

## Schedule the Process

Set the process to run either on a schedule or immediately in the **Schedule** tab of the Process Details window (available within Advanced options).

1. Click the **Advanced** button in the Process Details window.

2. Click the **Schedule** tab.
3. You can run the process on a schedule using the **Using a schedule** option and entering the schedule information. However, for the purposes of this example, we are going to run the process immediately. Click the **As soon as possible** option.
4. Click **Submit**.
5. If the process submitted successfully, a confirmation message appears with the request number (process ID). Make note of this ID to use it in the next step, Viewing Details of the Process Submission. Click **Ok** on the confirmation message dialog.
6. Close the Process Details window.

## View Details of the Process Submission

You can view details of the process submission, to make sure it ran without errors and to see how many records were processed.

1. Back in the Scheduled Processes page, enter the process name, Request Revenue Territory Assignment, in the **Name** field and click **Search**.
  - Alternatively, you can enter the process ID in the **Process ID** field and click **Search**.
2. In the search results that are returned, click the job name to view details of the submission. The submission details include such information as:
  - Start date and time
  - Whether the job completed successfully
  - Parameters used in the job
  - Log file containing additional details like the number of work objects processed successfully or with errors and any error messages if the job wasn't successful

### Related Topics

- [Recommendations for Assignment Processes for Opportunities](#)

## Assign a Territory to Closed Opportunity with Revenue Lines

The batch process, Request Revenue Territory Assignment, evaluates closed opportunity revenue lines and matches eligible territories and their salespeople to the closed revenue lines.

Use the procedures in this topic to capture closed opportunities created in the last number of days, run the territory-based assignment process, and monitor its success.

### Prerequisites

Here are the prerequisites to successfully assign resources to closed opportunities using this process:

- The organization hierarchy exists with valid resources.
- Live territories exist.
- Open opportunities exist with closed revenue lines.
- Territory attributes match attributes of closed opportunity revenue lines.
- The profile option, Opportunity Assignment Mode, is set to either Territory-Based Only or Both (not Rule-Based Assignment).
- You run the process as a user with the Sales Administrator job role.

## Find the Process

Here's how to find the process:

1. Navigate to **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process window, click the drop-down list next to the **Name** field and click **Search**.
4. In the Search dialog, enter the name of the process name, **Request Revenue Territory Assignment**, and click **Search**.
5. Select the process name **Request Revenue Territory Assignment** to assign sales territories to opportunity revenue lines by matching revenue attributes with territory dimensions and click **OK**.
6. Click **OK** again, if needed.
7. The Process Details window appears, where you will enter parameters using the steps in the next section, Enter Process Parameters.

## Enter Process Parameters

Enter the process parameters in the Parameters tab of the Process Details window. The process parameters are called "view criteria" in the UI.

There are many different options when setting up the view criteria. This example uses a simple view based on opportunity close date. When entering the data, remember that the values are case sensitive, and no spaces are used.

1. In the **View Criteria Name** field, enter `closedOpportunitiesByCreationDate`.
2. In the **View Criteria Bind Values** field, enter `BindOpptyCreationDateTo date, BindOpptyCreationDateFrom date`. This value captures all closed opportunities created in the last 90 days. Optionally you can pass a different date range. The format must be yyyy-mm-dd.
  - For example, to specify a date range, enter `BindEffectiveDateFrom=2012-01-01, BindEffectiveDateTo=2012-02-29`.
  - Leave the field blank to capture opportunities in the default date range, the past 90 days.
3. For the purposes of this example, leave the remaining fields at their default values.
4. Next, schedule the process to run, as described in the next section, Schedule the Process.

## Schedule the Process

Set the process to run either on a schedule or immediately in the **Schedule** tab of the Process Details window (available within Advanced options).

1. Click the **Advanced** button in the Process Details window.
2. Click the **Schedule** tab.
3. You can run the process on a schedule using the **Using a schedule** option and entering the schedule information. However, for the purposes of this example, we are going to run the process immediately. Click the **As soon as possible** option.
4. Click **Submit**.
5. If the process submitted successfully, a confirmation message appears with the request number (process ID). Make note of this ID to use it in the next step, Viewing Details of the Process Submission. Click **Ok** on the confirmation message dialog.
6. Close the Process Details window.

## View Details of the Process Submission

You can view details of the process submission, to make sure it ran without errors and to see how many records were processed.

1. Back in the Scheduled Processes page, enter the process name, Request Revenue Territory Assignment, in the **Name** field and click **Search**.
  - Alternatively, you can enter the process ID in the **Process ID** field and click **Search**.
2. In the search results that are returned, click the job name to view details of the submission. The submission details include such information as:
  - Start date and time
  - Whether the job completed successfully
  - Parameters used in the job
  - Log file containing additional details like the number of work objects processed successfully or with errors and any error messages if the job wasn't successful

### Related Topics

- [Recommendations for Assignment Processes for Opportunities](#)

## Rule-Based Opportunity Assignment

### Edit Assignment Rules to Randomly Assign Resources to Opportunities

Create assignment rules using rule sets, rules, conditions, and actions. You can also edit rules and run assignment to randomly assign resources to opportunities. The assignment process uses rules to evaluate and recommend candidate assignments for specified work objects.

A rule category is predefined for each type of rule-based assignment processing supported by each sales application object. For example, the rule category Sales Team Member Recommendation Default Rule Category is predefined for resource rule-based assignment of Opportunities. When the filter is set to **Random**, a random selection of matching candidates is assigned to the work object.

For example, rules exist to assign any opportunity for software products in the California locations to Scott and Lisa, and server products to Tracy and Bill. Currently, the rules are configured to randomly assign one of the sales representatives to opportunities in different locations. You now want to update these rules to include new sales locations in San Diego and Sacramento.

### Edit Assignment Rules

Here's how to modify assignment rules.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Sales Assignment Manager Rules

2. In the Manage Sales Assignment Manager Rules page, select the category where your existing rules were created, in this case **Sales Team Member Recommendation Default Rule Category**.

**Note:** Random is selected as the filter type.

3. In the **Conditions** section of the existing rule, update these details for your object:
  - **Attribute** = Account State
  - **Operator** = Equals
  - **Value** = San Diego
  - **Attribute** = Account State
  - **Operator** = Equals
  - **Value** = Sacramento
4. Click **Save and Publish** to publish the assignment details.

## Run Assignment

Mateo Lopez, who's the sales manager for the Western Region, signs in to search for new software opportunities from Pinnacle Technologies in the Sacramento location. When he finds an opportunity, he runs the assignment process so that the opportunity is assigned to either one of the sales representatives, Scott or Lisa, as follows:

1. Navigate to **Sales > Opportunities**.

The opportunity landing page displays your opportunities.

2. Select the opportunity you want.
3. Click **Actions**.
4. Click **Save and Run Assignment**.

Each time you run assignment on this opportunity, it could be assigned either to Lisa or to Scott, because the assignment rule is set to assign resources randomly.

5. Click the **Team** tab to check which sales representative is assigned to the opportunity.

### Related Topics

- [How are territories assigned to opportunities?](#)
- [About Sales Resources and Opportunity Assignment](#)
- [What types of assignment rules can I create?](#)
- [How do I update existing setup data?](#)

## Set Rule-Based Opportunity Assignment Profile Options

Whether you're using territory-based assignment or rule-based assignment or both to assign resources to opportunities, initially in your implementation you should validate the setting of these two profile options: Opportunity Assignment Mode and Assignment Submission at Save Enabled.

## Set Opportunity Assignment Profile Options

Here's how to set opportunity assignment profile options.

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Opportunity Profile Options
2. From the Manage Opportunity Profile Options page, enter the profile option name directly in the **Profile Display Name** field.
3. In the list that's returned, click the profile option to retrieve the details about the profile option.
4. Set the profile option as needed.

These profile options influence the affect of rule-based opportunity assignment:

| Profile Option Display Name                | Default Value                   | Effect                                                                                                                                                                                                                                |
|--------------------------------------------|---------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Opportunity Assignment Mode                | Territory-based Assignment Only | Specifies the type of assignment processing performed for opportunities. The available options are Territory-based Assignment Only, Rule-based Assignment Only, and Both (which runs both rule based and territory based assignment). |
| Assignment Submission at Save Enabled      | No                              | Specifies whether to run assignment on an opportunity when it's saved in the UI. If you want assignment to run anytime users save an opportunity, set the profile option to <b>Yes</b> .                                              |
| Sales Team Member Assignment Rule Category | None                            | Specify the assignment rule category used by the automatic assignment process to assign sales team members to opportunities.                                                                                                          |

### Related Topics

- [Set Opportunity Assignment Profile Options](#)
- [Opportunity Profile Options Default Values and Effects](#)
- [How do I update existing setup data?](#)

## How You Refresh Assignment Candidate Cache

Candidate data, such as resources, are loaded into a cache and used for each assignment request. Rule-based assignment requests that identify matching candidates or scores for matching candidates use candidate data.

You can refresh the candidate data cache at regular intervals using the Perform Assignment Data Publish, Refresh, and Synchronization scheduled process. This process marks the candidate for refresh, and the candidate data is refreshed the next time there is an assignment request using that candidate.

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

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

The refresh cache process has these parameters that you must enter:

| Candidate Object                   | Owner Module |
|------------------------------------|--------------|
| Resource_Candidate_Object          | Sales        |
| Resource_Candidate_Object_Lead     | leadMgmt     |
| ORA_Deal_Resource_Candidate_Object | leadMgmt     |
| ORA_Queue_Candidate_Object         | svcMgmt      |

**Note:** Don't enter or select values for the **Application** and **Publish** parameters if you want to run the refresh cache process.

For example, you can schedule one process for managing leads, using the parameter `Resource_Candidate_Object_Lead/leadMgmt`. Sales would need a process scheduled with the parameter `Resource_Candidate_Object/sales`.

#### Related Topics

- [Run Territory Assignment Process for Opportunities](#)
- [Recommendations for Assignment Processes for Opportunities](#)
- [Schedule Account Assignment](#)

## Lead Assignment

### Overview of Lead Assignment

Lead assignment is an automated process that assigns leads to sales resources, sales territories and partners. Sales leads require assignment, either in real-time or in batch.

Batch assignment runs batch processing that matches the lead objects, either as a one-off or on a scheduled basis. The two types of lead assignment are:

- Rule-Based Assignment

You can automatically calculate a score for each lead, or determine an appropriate rank or qualify a lead using rule based assignment. Assignment rules help ensure that sales resources are properly assigned to leads, and leads are appropriately scored, ranked or qualified. Select from predefined attributes or configure custom lead attributes to use in lead assignment rules.

- Territory-Based Assignment with Rule Filtering

Territory-based assignment relies on an association between attributes on the lead work object and attributes on the lead territory candidate object to match the candidates to the work object. For territory-based assignment, the lead work object and lead candidate object must have attributes that share the same domain of values.

Leads use Territory-Based Assignment to identify matching territories and then set up additional rules (Rule-Based Assignment) to filter the final set of territories that are returned, using any attribute of the work object.

## Lead Assignment Profile Options

Lead assignment profile options are configurable options that affect assignment manager application operations. Values defined at the user level take precedence over those at the site level. If a value isn't defined at the user level, the site level value is used.

### Lead Assignment

This table lists the profile options that affect the assignment of lead status, rank, score, resources, and territories on the lead. Before setting these profile options, you must perform the tasks listed under Configure Assignment Manager for Lead Processing setup task. From there you can review and update assignment of candidate objects such as rank, qualification status, and resources to leads.

| Profile Option Display Name                                                        | Default Value | Effect                                                                                                                                                                            |
|------------------------------------------------------------------------------------|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assignment Rule for Qualifying Leads (MKL_LEAD_ASSIGNMENT_QUAL_RULE)               | None          | Specify the rule to evaluate the lead and assign the lead status per rule conditions.                                                                                             |
| Assignment Rule for Ranking Leads (MKL_LEAD_ASSIGNMENT_RANK_RULE)                  | None          | Specify the rule to evaluate the lead and assign the lead rank per rule conditions.                                                                                               |
| Assignment Rule for Rule-Based Lead Assignment (MKL_LEAD_ASSIGNMENT_MATCHING_RULE) | None          | Specify the rule to evaluate the lead and assign the sale team resources per rule conditions.                                                                                     |
| Assignment Rule for Scoring Leads (MKL_LEAD_ASSIGNMENT_SCORE_RULE)                 | None          | Specify the rule to evaluate the lead and assign a score per rule conditions.                                                                                                     |
| Assignment Rule for Territory-Based Lead Assignment (MKL_LEAD_ASSIGNMENT_RULE)     | None          | Specify the rule to evaluate the lead and further filter territories derived using territory-based assignment per rule conditions.                                                |
| Lead Assignment Mode (MKL_LEAD_DEFAULT_ASGN_MODE)                                  | Both          | Specify the default assignment mode type allowed during on-demand or automatic lead assignment. On-demand assignment occurs when a user selects the assign lead action in the UI. |



| Profile Option Display Name                         | Default Value | Effect                                                                                                                                                                                                                                                          |
|-----------------------------------------------------|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lead Batch Reassignment (MKL_LEAD_BATCH_ASSIGNMENT) | N             | Enable batch lead reassignment, in addition to lead automatic reassignment. For example, when leads are selected for reassignment, they get reassigned when the Request Sales Lead Assignments process next runs using the Reassign process selection criteria. |

## Territory-Based Lead Assignment

### Considerations for Territory-Based Lead Assignment

Territory-based assignment relies on an association between attributes on the lead work object and attributes on the lead territory candidate object to match the candidates to the work object.

For territory-based assignment, the lead work object and lead candidate object must have attributes that share the same domain of values.

### Components That Affect Lead Assignment

Leads are ready for assignment once the data on the lead is cleansed, created, enriched, and scored. Here are the components that influence the assignment of leads:

- Lead work objects
- Lead candidate objects
- Attributes
- Mapping and rule conditions

Mapped attributes are used for matching appropriate candidates for a work object. For example, a sales lead (work object) has a geographic location attribute. The lead candidate object (territory) has also a geographic location attribute. These two attributes are mapped to each other.

Leads, including leads with an associated existing account, and net new leads, are assigned based on several criteria as outlined here. Net new leads are leads where the account and contact information remain on the lead until the lead is qualified and converted.

| Assignment criteria for leads                   | Assignment criteria for leads with an associated account | Assignment criteria for net new leads          |
|-------------------------------------------------|----------------------------------------------------------|------------------------------------------------|
| Lead Source                                     | Geography (Primary Address of the Account)               | Geography (Contact Address on the Lead)        |
| Geography                                       | Named account                                            | Industry                                       |
| Named accounts, such as the top 20              | Industry - Customer/Organization Size                    | Organization Type                              |
| Industry                                        | Organization Type                                        | Product                                        |
| Product                                         | Auxiliary Classifications 1 - 3                          | Sales Channel                                  |
| Partner for working with a partner organization | Product                                                  | Primary sales channel associated with the lead |

| Assignment criteria for leads                                                                               | Assignment criteria for leads with an associated account | Assignment criteria for net new leads                                |
|-------------------------------------------------------------------------------------------------------------|----------------------------------------------------------|----------------------------------------------------------------------|
| Primary sales channel associated with the lead<br><br>Associated marketing campaign that generated the lead |                                                          | Business Unit<br><br>Partner for working with a partner organization |

For example, let's take the following scenarios for a lead. A lead has either:

- A new Account where the CustomerId has a null value (no data) but other Account related fields such as AccountName, OrganizationType, OrganizationSize, and so on, have values.
- An existing Account where the CustomerId has a non-null value (has data) as do the other Account related fields.
- A new Contact where the PrimaryContactId has a null value (no data) but other Contact related fields such as PrimaryContactName, JobTitle, PrimaryContactEmailAddress, and so on, have values.
- An existing Contact where the PrimaryContactId has a non-null value (has data) as do the other Contact related fields.

The Sales Lead Territory: Mapping Sets subtab showing the **Conditional Attribute** column to indicate which mapping set becomes active. Depending on the lead's data, more than one mapping set becomes active to find and assign the matching territories. You can select or deselect the **Inactive** check box to activate or deactivate any of the mapping sets.

Sales Lead Territory: Rule CategoriesSales Lead Territory: Mapping Sets

ActionsViewFormat+XFreezeDetachWrap?

| Sequence | Name          | Work Object | Candidate Object     | Conditional Attribute              | Inactive                 |
|----------|---------------|-------------|----------------------|------------------------------------|--------------------------|
| 1        | Mapping Set 1 | Sales Lead  | Sales Lead Territory | <div>Sales Account Indicator</div> | <input type="checkbox"/> |
| 2        | Mapping Set 2 | Sales Lead  | Sales Lead Territory | Primary Partner Identifier         | <input type="checkbox"/> |
| 3        | Mapping Set 3 | Sales Lead  | Sales Lead Territory | Prospect Account Indicator         | <input type="checkbox"/> |
| 4        | Mapping Set 4 | Sales Lead  | Sales Lead Territory | Custom Account Indicator           | <input type="checkbox"/> |
| 5        | Mapping Set 5 | Sales Lead  | Sales Lead Territory | SimplifiedLeadFlag                 | <input type="checkbox"/> |

If the account on a lead is removed, then no mapping set is active. However, the predefined mapping set won't remove the territories assigned to lead. To replace the current territories assigned to a lead with another set on the next assignment run, you must select the **Replace Candidates** check box from the Sales Lead Territory: Candidates subtab on the Manage Sales Lead Assignment Objects page.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Leads
  - Task: Manage Sales Lead Assignment Objects
2. On the Manage Sales Lead Assignment Objects page, locate and select **Sales Lead** in the **Name** column.
3. In the **Sales Lead: Details** region, select the **Candidates** tab.
4. Select the candidate object **Sales Lead Territory** and expand this row and check what's the current setting for no rows matching.
5. Select **Replace Candidates** if you want to replace disqualified candidates on the team when the next assignment request is run.

## How Leads Are Assigned

Leads can be assigned based on simple rules evaluation. Leads that have an associated account with an address are distributed based on territory definitions. Territory-based evaluation can be supplemented by adding filtering rules to further refine the lead assignment. Territory-based evaluation uses:

- Lead work object
- Territory candidate object data
- Mappings between the territory dimensions and lead dimensional attributes to execute the assignment processing

## Examples of Lead Assignment Setup

A default set of lead work objects and associated candidate objects are predefined. However, you can set up the necessary lead work objects, and associated candidate objects, rules and mappings for assigning leads to suit your business requirements.

- Set up rules and rule sets specific to your business requirements.  
For example, set up an assignment rule to assign leads with deal size less than a certain amount to partners.
- Set up object mappings for territory-based assignment.  
For example, assign a lead to those territories where Territory dimensional attributes are mapped to corresponding Lead attributes.
- Set up rules to filter territories that match the lead based on additional information on the lead.  
For example, set up rules to exclude prime sales territories that match leads which are unqualified.

### Related Topics

- [Overview of Lead Assignment](#)
- [Lead Assignment Rules](#)
- [Overview of Scheduling Lead Processing Activities](#)

## Lead Assignment Rules

You specify assignment rules for leads to determine the rank, assign sales resources, calculate scores, and qualify leads. This topic provides some examples of how assignment rules are evaluated. It also outlines some basic questions to consider before creating rules.

Assignment rules are created using work objects, candidate objects, attributes, and conditions. You can use multiple types of assignment rules and rule sets for assignment of candidates, such as rank, qualification status, and resources, to the lead. For example, you can specify the assignment rule that assigns resources to sales leads by assigning individual sales resources that meet the rule criteria.

When creating an assignment rule that uses a check box field, note that the value of true may be denoted by "Y" or "Yes" or "T". Ensure the check box is clear if you want to denote a false value.

## Assignment Rule Criteria

An assignment rule can have one or more assignment criteria. For example, all leads, lower than a certain deal size and for a specific product, are assigned to a specific Partner resource. Another example might include assigning only

those leads generated from a specific marketing campaign, such as a CEO round table discussion event, to a specific salesperson.

## Assignment Rule Considerations

When designing rules, carefully consider how you want to match the candidates to the lead. For example, would you want resources assigned based on their geographic location, or their product knowledge, or their skill level, or a combination of any of these attributes? Do you want to match candidates only, or would you like to match them and score them to identify the best fit? In a multiple candidate scenario, do you want to assign all matching candidates or only those who achieve higher than a specific score?

**Note:** You can assign resources to leads only through rule-based assignment.

### Related Topics

- [Example of Using Territory-Based Assignment with Rule-Based Filtering](#)
- [What types of assignment rules can I create?](#)

## How Lead Status is Automatically Set

Lead quality is assessed as soon as a lead is generated. This topic describes the settings that are used to determine the qualification status of a sales lead. Lead quality of a newly created lead is based on:

- Characteristics of the customer contact on the lead
- Type of response which caused the lead to be generated

Lead quality is further assessed based on added qualification data such as customer need, urgency or time frame for the project, and whether a budget is approved for the product.

## Settings That Affect Lead Qualification Status

Leads can get their qualification status from:

- Assignment rules

Rules-based leads qualification process helps standardize the lead qualification process. Based on the positive results to conditional rules, the value of the Lead Status attribute is set to Qualified. For example, a rule can be defined to update the lead as qualified if the:

- Customer's budget status is approved
  - Project time frame is three months
  - Decision maker is identified
  - Response type is that the customer attended an event
- An imported value

Leads imported through file import can include a designated lead qualification status.

## How Lead Qualification Status Is Calculated

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

## Examples of Territory-Based Lead Assignment

You can assign leads to the appropriate territories based on matching lead attributes to territory dimensions.

This topic provides some examples of the relationship between the assignment of sales leads to territories. It also contains examples of different dimensions used to assign sales leads to the correct sales territories.

A territory is the jurisdiction of responsibility of a sales resource over a set of sales accounts. Use territory-based assignment to assign sales territories to leads.

### Assign Territories to Lead Territory Team

You can set up Assignment Manager to automatically assign sales territories to the lead using territories defined in Territory Manager. For example, a salesperson navigates to the leads list and opens the newly created lead. Using the Reassign action, the salesperson accesses the assignment manager feature and selects an option to run automatic assignment immediately to reassign the lead to the appropriate territories.

### Territory-Based Assignment Mapping

You can leverage predefined territory-based assignment mappings to match the correct territories with each lead. For example, you can map the location attribute on the lead to the geography attribute on the territory. Any territories where the geography value matches the location of the lead is matched and assigned the lead.

Ensure you have defined your territory boundary based on dimensions. There's only one set of mappings for a work object and candidate object combination. The mappings for various assignment scenarios (such as assignment of a territory to a lead) must be setup through a mapping that assigns appropriate sales territories to a lead territory team. If the lead needs rule-based assignment, then rule sets are used. If the lead needs territory assignment only, then the rules may not be required.

### Examples of Enabling Territory Dimensions

You can enable only the dimensions that your organization requires for defining territories. These examples illustrate different dimensions used to assign sales leads to the correct sales territories.

| Dimension     | Use                                                                                                                                                                                                                                                 |
|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Geography     | For most of your sales activities, you want to assign salespeople by city and postal code.                                                                                                                                                          |
| Account       | You have a few key accounts that should belong to top salespeople. Use the account dimension to create territories for individual sales accounts.                                                                                                   |
| Customer Size | One product line is suitable only for organizations above a certain size, and you have a few skilled salespeople for that product line. Use the customer size dimension to assign skilled salespeople to the larger customers for the product line. |
| Industry      | You sell one type of service to telecommunications companies, another service to utilities, and a third service for insurance companies. You can create territories for each using the industry dimension.                                          |

| Dimension     | Use                                                                                                                                                                                                                                                              |
|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|               |                                                                                                                                                                                                                                                                  |
| Product       | You sell a product line that requires salespeople to have a high degree of technical knowledge. Create separate territories for this product line.                                                                                                               |
| Sales Channel | Your sales department prefers to engage partners as indirect sales channel, and telesales functions in addition to the direct sales force. You can create territories for these different sales channels such as telesales, direct, and indirect sales channels. |

## How to Edit Auxiliary Dimensions for Lead Territory Assignment

This topic is applicable for the lead assignment set up where you want to change auxiliary dimension mappings to point to different classification codes as part of your lead territory assignment.

Here are the predefined auxiliary dimension work object attribute mappings:

- Aux1 - Auxiliary Classification Code 2
- Aux2 - Auxiliary Classification Code 1
- Aux3 - Auxiliary Classification Code 3

You now have a scenario where your organization wants to change these mappings. For this example, you want:

- Aux1 - Work Object attribute to point to Classification Code 3
- Aux3 - Work Object attribute to point to Classification Code 4

## Set the Lead Territory Assignment Mapping

Here's how to change the mappings:

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Leads
  - Task: Manage Sales Lead Assignment Objects
2. On the Manage Sales Lead Assignment Objects page, locate and select **Sales Lead** in the **Name** column.
3. In the **Sales Lead: Details** region, select the **Candidates** tab.
4. Select the **Sales Lead Territory** candidate.
5. Select the **Sales Lead Territory: Mapping Sets** tab.
6. In the **Name** column, select **Mapping Set 5** from one of these active mapping sets for the sales lead object you want:
  - **Mapping Set 1**
  - **Mapping Set 2**
  - **Mapping Set 3**
  - **Mapping Set 4**
  - **Mapping Set 5**
7. In the **Mapping Set 5: Mappings** region, locate and select the **Aux1** and **Aux3** auxiliary dimension function code.

8. Click the pencil icon to edit them in the Edit Mappings dialog window.
9. In the **Work Object Attribute** region select these attributes.
  - Aux1 - Auxiliary Classification Code 3
  - Aux3 - Auxiliary Classification Code 4.
10. Click **OK**.
11. Click **Save and Publish**.
12. Monitor and refresh the page to confirm the publish process has succeeded.

The sales lead assignment processing is now ready to use the changed auxiliary dimension information when assigning leads to territories.

## Lead Assignment Scheduled Processes

### Overview of Scheduling Lead Processing Activities

This topic outlines the lead processing activity that sets lead rank, score, and lead qualification status for a selected batch of leads.

Lead data is generated from a variety of sources and goes through further enrichment based on updates and follow-up activities. As a result, lead quality must be assessed periodically so that leads get distributed to the right salesperson to ensure timely lead follow up and closure.

**Note:** Privileges provide the access required to run specific scheduled processes. Privileges are granted to duty roles, which are granted to job roles. To see which job roles inherit the required privileges, use the Security Console or the security reference manuals for the appropriate product family. For example, to update Lead records, you need to be granted the MKL\_UPDATE\_SALES\_LEAD\_PRIV privilege.

Leads are distributed to individual salespeople and sales territories for further qualification and follow-up. The **Create Lead Processing Activity** page enables you to:

- Define and submit lead processing activities
- Search for and select specific leads to process
- Start or schedule the lead processing activity

### Activity Details

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. The process type determines the type of activity you want to process such as:

- Lead assignment
- Qualification
- Ranking
- Scoring

Each type is associated with appropriate rule categories and assignment rules for the profile option used to activate the lead processing activity, such as, Assignment Rule for Ranking Leads. For example, if you select lead ranking as the process type, then rank assignment rules are used for processing the selected leads.

## Lead Selection

You can use filtering criteria for selecting leads as input to the lead processing activity. For example, you can process leads that are unassigned, or leads that have a status of qualified. The selected leads are processed (qualified, ranked, scored, assigned) based on the corresponding assignment rules defined.

## Schedule

Lead processing activities are scheduled for the purposes of periodic ranking, scoring, qualification, and distribution of leads. Due to the periodic nature of all lead processing activities, it's necessary to automate the running of these activities. Enter scheduling options such as schedule mode and frequency to determine when the lead processing activity should begin and how often the activity is repeated.

### Related Topics

- [Batch Assignment Diagnostic Log](#)
- [Example of Running Lead Batch Assignment in Diagnostic Mode](#)
- [About Purging Batch Assignment Information](#)

## Example of Running a Lead Assignment Process

This example describes running a lead assignment process twice. First, run the process to assign imported leads to the inside sales representatives for lead qualification. Next, assign the qualified leads to field sales for conversion to opportunities.

Here's how to create a lead processing activity to run the lead assignment process:

1. Search for and open the task **Manage Lead Processing Activities** from the Setup and Maintenance work area.

The Lead Processing Activities page appears. This page lists all of your processing activities.

2. Click **Create Lead Processing Activity**.

The Create Lead Processing Activity window appears.

3. To assign the leads you previously imported to inside sales for qualification, enter the parameters listed in this table.

| UI Region        | Field             | Entry       |
|------------------|-------------------|-------------|
| Activity Details | Process Type      | Assignment  |
| Lead Selection   | Status            | Unqualified |
| Lead Selection   | Assignment Status | Unassigned  |
| Schedule         | Schedule Mode     | Immediate   |

4. Click **Submit**.



5. Next, create and submit a second activity to assign the leads to field sales after the leads are qualified. Enter the parameters listed in this table.

| UI Region        | Field         | Entry                                                                                                                                                                                                                                                                                                                                                            |
|------------------|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Activity Details | Process Type  | Assignment                                                                                                                                                                                                                                                                                                                                                       |
| Lead Selection   | Status        | Qualified                                                                                                                                                                                                                                                                                                                                                        |
| Schedule         | Schedule Mode | <p>Run this activity on a repeating schedule to make sure the leads are transferred to field sales as soon as they're qualified by inside sales.</p> <p>To run the activity regularly, select <b>Repeats</b>, enter a frequency, a start date, and an end date far into the future. You must enter both a start date and an end date for the process to run.</p> |

6. You can monitor the processes on the Manage Lead Processing Activities page. This page lists all of your processing activities.

Depending on your settings, your process runs immediately or at the intervals you specified. You can monitor its progress by searching for the job set process by name on the Overview page.

You can also set up the process to run regularly per your business requirements as follows:

1. Click **Advanced**.
2. Click the Schedule tab.
3. Select the **Using a schedule** option.
4. Select the frequency and start date.
5. Enter an end date far in the future.
6. Click **Submit**.

## Example of Running Lead Batch Assignment in Diagnostic Mode

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

### Running Batch Assignment

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

1. Go to **Navigator**, and then select the **Lead Qualification** menu item.
2. Select **Lead Processing Activities** on the **Tasks** pane.
3. On the Lead Processing Activity page, click the **Create Lead Processing Activity** button.
4. On the Create Lead Processing Activity page:

- a. Select **Assignment** from the **Process Type** list.
  - b. Enable diagnostic mode by checking the **Diagnostic Mode** check box.
  - c. Search and select a lead. Note down the lead number value to use in a later step.
  - d. Select **Immediate** from the **Schedule** list.
  - e. Click **Submit**.
5. On the Confirmation dialog box, click **OK**.

Two process are submitted, one for lead territory assignment and the other for lead rule-based (or resource) assignment. Note down the identifier of the territory or resource assignment processes you're interested in.
6. Click the Refresh icon until the process has completed successfully or with an error.
7. Select the appropriate territory or rule-based assignment process, and then click the Output log icon in the **View Log** column to view details.

Open the log file in another browser window or tab.

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

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

#### Related Topics

- [Batch Assignment Diagnostic Log](#)

## Rule-Based Lead Assignment

### Lead Ranking

When setting up lead management capabilities, you can predefine criteria to rank leads. You can define lead rank to categorize leads into buckets such as Hot, Warm, or Cool. Although lead rank and lead score aren't the same, they serve a similar purpose.

#### Create Ranking Rules

When a sales lead is created, a lead rank is first calculated based on assignment rules. The ranking classification rule set type determines the rank of the lead based on the values of the attributes on the lead. These data points help to evaluate lead ranking rules:

- All data included on the lead and lead primary product data
- All customer profile data including industry and customer size classifications
- All contact profile data
- All lead qualification data

Here's how you can set up a lead rank rule:

1. Navigate to the Setup and Maintenance work area and select Manage Sales Lead Assignment Rules task.

2. Select the Sales Lead Ranking Rule Category.
3. Create a rule set with a rule set type of Classification Rule.
4. Set the work object as lead and the candidate object as lead rank.
5. Create a rule with conditions that match the attribute settings you want a lead to have to give it a rank value.  
For example, you might select the Decision Maker Identified attribute name and then select the equal (=) operator.
6. Enter the value of True.  
**Note:** When creating an assignment rule that uses a check box field, note that the value of true may be denoted by "Y" or "Yes" or "T". Ensure the check box is clear if you want to denote a false value.
7. Create any other remaining conditions that you want, and then enter the action for your rule, such as Return the candidate value as Hot.

## Calculate Lead Rank Based on a Score

You can schedule when and how often to process lead ranking where the lead rank value or score is calculated and displayed. Ranking rules determine what rank to assign to a lead. You can also create ranking rules that use the lead score as the criteria to name each range of scores with a specific rank.

For example, if the lead score is between a value range of 0 and 39, you can create a rule to rank the lead as low priority. If the lead score is between a value of 40 and a value of 60, then create a ranking rule that assigns a medium rank to the lead. The assignment manager process passes the rank value to the lead management process and a rank value is displayed as a list. You can override the value by selecting a different predefined rank code or value from the list.

### Related Topics

- [Example of Creating a Lead Ranking Rule](#)

## How can I define the automatic assignment of Lead team resources?

Using a scheduled process, you can automatically assign lead team members and appropriate sales territories to leads. The scheduled process accepts criteria to determine the batch of leads to be assigned.

During the rule-based assignment phase of the batch process, matching candidates are automatically added to the lead team. During the territory-based assignment phase of the batch process, territories are automatically added to the lead territory team.

This example outlines how to set up lead assignment tasks and to schedule the tasks in sequence so that you can automate the lead resource assignment process.

### Scenario

The automotive sector uses geography data and overall lead quality to periodically assign leads to automotive dealers. You can assign leads automatically by using score and rank criteria before being assigned a resource. Leads are automatically assigned through the assignment manager feature by associating assignment criteria to assignment rules. For example, leads are assigned based on the following criteria:

- Lead source
- Geography
- Lead score
- Named accounts, such as the top 20
- Industry

- Products

When partners must engage with customers to ensure a timely sales follow up, set up assignment manager to automatically assign partner leads to internal channel managers.

## Manual Setup Assignment Manager Tasks

You can perform manual setup tasks through the assignment manager UI as follows:

- Define lead distribution rules
- Define partner matching rules
- Define the quality parameters to assign leads for follow-up activities
- Set up lead qualification rules
- Set up lead classification rules to assign leads to specific sales channels
- Set up lead routing rules to route leads to sales resources in a selected sales channel
- Set up lead distribution rules to assign leads to a specific salesperson or a partner sales territory

Use rule sets if you're assigning leads by rule-based assignment. If the lead requires territory-based assignment only, then rule sets aren't used. During a lead import, either ranking or scoring is used as the default qualification criteria. However, if scoring is used to determine the lead rank, then both lead score and lead rank can be used as criteria for assigning lead resources.

## Automatic Assignment Manager Tasks in Batch Mode

To automate assigning lead resources, schedule and sequence these tasks to occur in this order when assignment manager runs in batch mode:

- Assign leads to a sales channel
- Route leads to sales organizations and sales territories
- Assign leads to individual salespeople or partners

You can also manually assign leads to specific internal or external resources. You can make these selections:

- Job type
- Rule set
- Filtering criteria for selecting lead

## Examples of Sales Lead Team

A sales lead team is made up of assigned territories and individual team members. Here are some examples that illustrate some of the features available for the sales lead team.

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

## Automate Assignment of Individual Resources to Sales Lead Team

The sales lead team for your company wants to add a support person to the lead. Typically, support people aren't part of any sales territory. Use the Manage Sales Lead Assignment Rules task to set up a rule set for the category, Sales Lead

**Resource Rule Category.** For example, assign support team members as individual resources based on rules which match the lead product with specific support team members.

## Add Ad Hoc Members to Sales Lead Team

Generally, sales team resources are automatically assigned to leads based on configured assignment rules. The following scenarios provide examples of when you may want to manually add additional team members to assist with the lead.

- The lead owner, who has full access to your company lead, wants to add one of his company's contractual experts to his team to help pursue the lead. The lead owner manually accesses the resource drop-down list and selects the ad hoc resource that he wants to add to his team.
- When pursuing a lead for an insurance policy, the customer contact requests a unique and complex combination of policy components that require a review from an expert in the company. The lead owner adds the expert resource to the lead with full access. Now, the expert resource can update the lead with valid combinations of products and services, and, if required, add more team members to the team.
- A salesperson is pursuing a lead that requires the export of products outside the country. He wants to ensure there are no legal issues with exporting the products. The salesperson adds a member of their company's legal team to the lead to review the details before contacting the customer again.

## Update Access Rights Based on the Resource

When a resource is added to the sales lead team through rule-based assignment, the profile option, Internal Resource Sales Team Access Level Default, determines the member's default access level. Resources in the management hierarchy of a newly added team member have the same level of access to the sales leads as the team member. See [Account Team Member Access Levels](#) and [Opportunity Team Profile Options](#) for more information.

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

## Change the Lead Owner

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

### *Related Topics*

- [How Users Gain Access to Leads](#)

## Example of Lead Score Calculation

Use a lead score only when the lead is easily quantified. You might use the score to calculate the lead rank. You can schedule when and how often to perform lead scoring.

Here's an example of how lead score is calculated.

## How Lead Score Is Determined

To get a lead score, the rules engine needs to determine a numeric score based on the value of the lead attribute participating in the rule. For example, consider this rule:

- If a lead contact is a high-level executive, then add a score of 100. If the lead contact is an operations manager, then add a score of 50.

When the rules engine evaluates the lead, it scores the lead based on the job title of the lead contact. After the rules engine evaluates all such rules, the result of the scoring process is an aggregate score, that's then recorded in the Lead Score attribute.

## Data Points for Lead Scoring

These data points form part of the overall score evaluation:

- All data included on the lead and primary product
- Lead source data such as campaign attributes
- All customer profile data including industry
- All contact profile data

## Example of Creating a Lead Ranking Rule

You can define a lead rank to categorize leads into buckets such as Hot, Warm, or Cool leads. This categorization of leads lets a salesperson quickly prioritize leads for follow-up activities.

Here's an example of creating a lead ranking rule:

### Create a Lead Rank Rule

Your organization wants to assign a rank of Hot to sales leads that have a set time frame and a decision maker identified. In Assignment Manager, there's already a predefined lead work object and lead candidate object.

Here's how to set up an assignment rule to determine the appropriate classification to apply a rank to all leads for your organization:

1. From the Manage Sales Lead Assignment Rules page, select the **Sales Lead Ranking Rule Category**.
2. Select the classification rule type, Sales Lead work object, and Lead Rank as the candidate object.
3. From the **Associated Rule Set Groups** tab, create a ranking rule and name it **Ranking**. You can search and select another rule set group (if one exists), to associate with the classification rule type.
4. Set the conditions for each rule that the rules engine checks during assignment processing. For example, enter these rule conditions:
  - Attribute: Time Frame
  - Operator: Equals
  - Value: Three months
5. Click **Add Row** icon in Conditions and enter these details:
  - Attribute: Decision Maker Identified
  - Operator: Equals
  - Value: True
  - Action: Return the candidate value as Hot
6. Click **Save and Close**.

The Assignment Manager:

- Finds the matching leads
- Executes the rules

- Assigns the rank value to the lead

#### *Related Topics*

- [Lead Assignment Rules](#)
- [Lead Ranking](#)

## Partner Assignment

### Overview of Assigning Territories to Partners

Companies can have thousands of partners, so being able to quickly give users access to partner accounts and to the leads and opportunities for those accounts is very helpful. You can use territory assignment to perform this task.

The available assignment types are:

- Batch assignment
- Manual assignment

You can use the following methods to determine assignment:

- Partner Account Belongs To: For attributes used to match against partner-centric coverage territories
- Partner Account Serves To: For attributes used to match against sales account-centric coverage territories.

You must be on the partner team with full access and have the Partner Account Maintenance or Administration Duty role to perform manual and batch assignment.

All members of the internal territory, including owner and resources, have full access to the partner information. Users with Partner Account Maintenance Duty or Partner Account Administration Duty can view territories assigned to a partner account.

### Batch Assignment

After partners are imported, partner accounts created in an import batch can be assigned using view criteria with the Assign Territories to Partner Account assignment process. After territories are realigned, partner accounts that are affected by the realignment are reassigned.

During the initial implementation, partner accounts can be created before any territories have been set up (for example, as part of a migration). These accounts don't receive a territory assignment because no territories exist yet. They must be explicitly assigned after territories are created. In this case, it's recommended that you run a batch assignment using the view criteria "PartnersInABatchNeedingReassignment" to assign these accounts to territories.

### Manual Assignment

For manual assignment, use the Assign Territories action available in the Edit Partner page. You must have the Partner Maintenance Duty for the partner to use this action.

When you click the Assign Territories action, assignment processing begins and it returns a list of territories matching the partner. You can save this list and make the assignment, or cancel and make no changes to the existing assigned territories.

*Related Topics*

- [Assign Territories to Partners with Batch Assignment](#)

## Assign Territories to Partners with Batch Assignment

This topic explains how to assign territories to partners using batch assignment.

### Configure Batch Assignment

The following table shows the view criteria names and some example bind variable values to use when configuring batch assignment.

| View Criteria Name            | Bind Variable Value                                                               |
|-------------------------------|-----------------------------------------------------------------------------------|
| PartnersOfAStatus             | BindStatus=ACTIVE                                                                 |
| PartnersCreatedInLastNDays    | BindNumberOfDays=1                                                                |
| PartnersUpdatedInLastNDays    | BindNumberOfDays=2                                                                |
| PartnersImportedInABatch      | BindImportBatchId=11001                                                           |
| PartnersInACountry            | BindCountryCode=<br>For example, the BindCountryCode for the United States is US. |
| PartnersBelongingToAnIndustry | BindIndustryBelongedTo=1000<br>Where 1000 is Industry Classification code.        |
| PartnersWithAProductDim       | BindProduct=Education                                                             |
| PartnersWithAGeographyDim     | BindGeographyServed=Netherlands                                                   |
| PartnersWithIndustryDim       | BindIndustryServed=Life Sciences                                                  |

1. From the Tools area in Navigator, select **Scheduled Processes**.
2. On the Scheduled Processes page, click **Schedule New Process**.
3. On the Schedule New Process dialog box, click the drop-down arrow next to **Name** and then click the **Search** link.
4. On the Search and Select: Name dialog, type **Assign** in the **Name** field and click **Search**.
5. Select **Assign Territories to Partner Account** from the returned list and click **OK**.
6. Click **OK** on the Schedule New Process dialog.
7. On the Process Details page, enter View Criteria Name and View Criteria Bind Values, then click **Submit**.



8. The Scheduled Processes page appears. Notice that the Status is Scheduled. You can click the **Log** link to see the log.

## Overview of Manually Assigning Partners and Partner Sales Credits in Opportunities

You can manually add partners to or remove partners from the opportunity team. You also can assign nonrevenue sales credit to partners in opportunities. Partner assignment and sales credit allocation follow specific rules.

### Partner Assignment to Opportunities

Note the following behavior for partner assignment to opportunities:

- Partner resources cannot be removed from the opportunity team if they are receiving non-revenue credit on the opportunity. To remove a partner, you must first remove the credit allocations he is assigned.
- When a partner organization is removed from the opportunity, and no resource from that partner organization is receiving sales credit on the opportunity, all partner resources, if they exist, are automatically removed from the opportunity team.
- Territories of type Partner or Partner Program are not assigned to opportunities.
- The resources list of values only displays partner resources whose partner organization is already associated with the opportunity.

### Sales Credits and Partners

Note the following behavior for partners receiving sales credit:

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

## Assignment Reports

### Example of Generating Assignment Reports

You can use the Diagnostic Dashboard to generate the following reports:

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

This topic explains how to generate a batch assignment progress report, as an example.

**Prerequisite:** As a user with access to the Schedule Processes UI, such as the sales administrator, click **Navigator**, and then click **Scheduled Processes** within the **Tools** heading. Run the batch assignment processes for sales accounts and opportunities. See the topics, Recommendations for Assignment Processes for Opportunities, and Schedule Account Assignment, for more information.

You must have the required job or duty roles to run diagnostic reports from the Diagnostic Dashboard. The setup user created for you by the service is automatically provisioned with the required job role, Application Diagnostics Administrator (which contains the required duty roles). Therefore, you can use this setup user (or another user that you create and provision with this job role) to run the diagnostic reports. For details on how to add the duty roles to an existing user, see DOC ID 1374930.1 on My Oracle Support (support.oracle.com). This article describes how to assign user access to the Oracle Fusion Applications Diagnostic Dashboard.

## Batch Assignment Progress Report

This section describes a scenario for running the batch assignment progress report. It takes you through generating a batch assignment report and viewing the completed report.

Here's how to generate the batch assignment progress report:

1. Sign in as a user who has access to the Diagnostic Dashboard.
2. Click your user image or name in the global header.
3. Click **Run Diagnostics Tests**, within the **Troubleshooting** area.
4. On the Diagnostic Dashboard page, search for the report name you want to run. In this example, search for **Batch Assignment Progress Report**.
5. Select **Batch Assignment Progress Report** and click **Add to Run**.  
The Batch Assignment Progress Report is added in the **Choose Tests to Run and Supply Inputs** region.
6. Click the warning icon in the **Input Status** column, and enter the parameters in the **Input Parameters** page that appears.
7. Click **OK**.
8. In the **Choose Tests to Run and Supply Inputs** region, enter a name in the **Run Name** field and click **Run**.
9. In the **Confirmation** dialog box, click **OK**.  
The status of the report appears in the **Diagnostic Test Run Status** region.
10. Click the completed report to open the report page.

You can now use the report for your analysis. You can follow the same procedure to generate the Batch Assignment Error Report and the Territory Dimension Data Report.

## What is a Batch Assignment Progress Report?

You can generate a batch assignment progress report to show you a variety of details about your assignment processes.

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

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

Input Parameters

The report has the following input parameters:

| Input Parameter       | Description                                                                            |
|-----------------------|----------------------------------------------------------------------------------------|
| Parent Process ID     | Identifiers for the parent scheduled processes.<br>You can enter multiple process IDs. |
| From Date             | Select the start date.                                                                 |
| To Date               | Select the end date.                                                                   |
| Include Sub Processes | Select <b>True</b> to include sub-processes. The default value is <b>False</b> .       |

### Example Report

Here is an example of a batch assignment progress report, along with description of what each value means:

| Column                         | Sample Value                           | Description                                                           |
|--------------------------------|----------------------------------------|-----------------------------------------------------------------------|
| Parent Process ID              | 504                                    | Identifier for the scheduled process                                  |
| Work Object                    | SalesAccount_Work_Object               | Code for the work object                                              |
| Candidate Object               | SalesAccountTerritory_Candidate_Object | Code for the candidate object                                         |
| Submitted By                   | Sales_admin                            | User name of the person submitting the process                        |
| Process Status                 | Running                                | Status of the process, such as, Not Started, In Progress, or Canceled |
| Process Start Time             | 11/19/12 8:48 PM UTC                   | Start Time of the process. Shows date, hours, and minutes             |
| Process End Time               | 11/19/12 8:56 PM UTC                   | End Time of the process. Shows date, hours, and minutes               |
| Process Elapsed Time (Minutes) | 22                                     | Number of minutes the process has been running                        |
| Records per Minute             | 10.46                                  | Number of records processed per minute                                |
| Number of Sub Processes        | 10                                     | Number of sub-processes launched from the parent process              |

| Column                            | Sample Value | Description                                                  |
|-----------------------------------|--------------|--------------------------------------------------------------|
| Number of Records                 | 100000       | Number of records in the process                             |
| Number Not Processed              | 94452        | Number of records not yet processed                          |
| Number Successful                 | 5542         | Number of records successfully processed                     |
| Number Failed                     | 6            | Number of records failed                                     |
| Failure Rate                      | 0.00006      | Number of failures divided by the Number of items            |
| Assignment Elapsed Time           | 21.45        | Number of minutes the assignment processing has been running |
| Records Processed Last 10 Minutes | 12.63        | Number of records processed in the previous 10 minutes       |
| Number of Retries                 | 0            | Number of times the process has been resubmitted             |

You can also use the report to estimate the time it will take to complete a batch assignment process. This report provides details on the number of records completed and the number of records in progress. You can generate this report repeatedly to conduct performance analysis of the batch assignment processing.

#### Related Topics

- [Example of Generating Assignment Reports](#)

## What is a Batch Assignment Error Report?

Use assignment management functionality to generate batch assignment error report. The batch assignment error report provides details of the error and warning messages generated while processing individual records during batch assignment process.

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

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

#### Report Parameters

Here's a description of the input parameters used to generate the batch assignment error report.

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

### Example Report

Here's an example of the Process Summary section of a batch assignment error report:

#### Process Summary

| Work Object              | Candidate Object                       | Start Time      | End Time        |
|--------------------------|----------------------------------------|-----------------|-----------------|
| SalesAccount_Work_Object | SalesAccountTerritory_Candidate_Object | 2013/2/11 12:13 | 2013/2/11 02:45 |

Here's an example of the Process Details section containing the records that meet the criteria entered when running the batch assignment error report:

| Work Object Public Unique Identifier | Assignment Status | Message Details                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1243213                              | Successful        | Not applicable.                                                                                                                                                                                                                                                                                                                                                               |
| 1728224                              | Error             | 225030 MOW_AMENG_AO_ASSERT_FAILED<br>An error occurred while loading assignment object Sales_Account_Work_object. There's a mismatch between the view object definition in the assignment configuration and the actual view object definition used during assignment processing. Update and save the assignment object to register it with the latest view object definition. |
| 1982663                              | Successful        | Not applicable.                                                                                                                                                                                                                                                                                                                                                               |
| 2392053                              | Successful        | Not applicable.                                                                                                                                                                                                                                                                                                                                                               |

Use the batch assignment error report to check if there were errors in the batch assignment process and if a particular work object record was processed.

#### Related Topics

- [Example of Generating Assignment Reports](#)

## Example of Running Lead Batch Assignment in Diagnostic Mode

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

### Running Batch Assignment

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

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

Two process are submitted, one for lead territory assignment and the other for lead rule-based (or resource) assignment. Note down the identifier of the territory or resource assignment processes you're interested in.

6. Click the Refresh icon until the process has completed successfully or with an error.
7. Select the appropriate territory or rule-based assignment process, and then click the Output log icon in the **View Log** column to view details.

Open the log file in another browser window or tab.

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

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

#### Related Topics

- [Batch Assignment Diagnostic Log](#)

## Example of Running Opportunity Batch Assignment in Diagnostic Mode

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running opportunity batch assignment in diagnostic mode.

### Run Batch Assignment

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

1. Go to **Navigator**, and then select **Scheduled Processes**.
2. Click **Schedule New Process**.
3. On the Schedule New Process page, click the **Name** drop-down list, and click **Search**.
4. On the Search and Select: Name dialog box, search for the Request Revenue Territory Assignment process.
5. Select the **Request Revenue Territory Assignment** process, and click **OK**.
6. On the Schedule New Process page, click **OK**.
7. On the Process Details page, enter the parameter values as shown in the following table:

| Parameter                 | Value                                                   |
|---------------------------|---------------------------------------------------------|
| View Criteria Name        | FilterByOptyNumber                                      |
| View Criteria Bind Values | BindOptyNumber=XXX, where XXX is the opportunity number |
| Diagnostic Mode           | Select the check box.                                   |

8. Click **Submit**.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.
11. Open the log file in another browser or tab.

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

View the log file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

#### Related Topics

- [Batch Assignment Diagnostic Log](#)

## Example of Running Account Batch Assignment in Diagnostic Mode

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running account batch assignment in diagnostic mode.

**Note:** Account batch assignment is usually run in diagnostic mode to find why an account isn't assigned to a territory. For any view criteria applied in the diagnostic mode, the diagnostic will only be run for one account.

### Run Batch Assignment

A sales representative of a company is due to meet with a new account he's now responsible for, but the account hasn't been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running account batch assignment in diagnostic mode.

1. Go to **Navigator**, and then select **Scheduled Processes**.
2. Click **Schedule New Process**.
3. On the Schedule New Process page, click the **Name** drop-down list, and click **Search**.
4. On the Search and Select: Name dialog box, search for the Request Account Assignments process.
5. Select the **Request Account Assignments** process, and click **OK**.
6. On the Schedule New Process page, click **OK**.
7. On the Process Details page, enter the parameter values as shown:

| Parameter                 | Value                                                                     |
|---------------------------|---------------------------------------------------------------------------|
| Work Object               | SalesAccount_Work_Object                                                  |
| Candidate Object          | SalesAccountTerritory_Candidate_Object                                    |
| Assignment Mode           | Territory                                                                 |
| View Criteria Name        | RegistryIDVC                                                              |
| View Criteria Bind Values | RegistryIDs=XXX where XXX is the party number (also known as registry ID) |
| Diagnostic Mode           | Select the check box.                                                     |

8. Click **Submit**.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.
11. Open the log file in another browser or tab.



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

View the log file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

#### Related Topics

- [Batch Assignment Diagnostic Log](#)

## Example of Running Partner Account Batch Assignment in Diagnostic Mode

You can run your batch assignment in diagnostic mode to view the details of the assignment processing in an output log. This topic provides an example of running partner batch assignment in diagnostic mode.

### Run Batch Assignment

A channel account manager of a company is due to meet with a partner account he's now responsible for, but the partner account hasn't been assigned to his territory. He has requested that you, the sales administrator, investigate the details of territory assignment. You can provide these details by running partner account batch assignment in diagnostic mode.

1. Go to **Navigator**, and then select **Scheduled Processes**.
2. Click **Schedule New Process**.
3. On the Schedule New Process page, click the **Name** drop-down list, and click **Search**.
4. On the Search and Select: Name dialog box, search for the Assign Territories to Partner Account process.
5. Select the **Assign Territories to Partner Account** process, and click **OK**.
6. On the Schedule New Process page, click **OK**.
7. On the Process Details page, enter the parameter values as shown in the following table:

| Parameter                 | Value                                                 |
|---------------------------|-------------------------------------------------------|
| View Criteria Name        | QueryByCompanyNumber                                  |
| View Criteria Bind Values | BindCompanyNumber=XXX where XXX is the partner number |
| Diagnostic Mode           | Select the check box.                                 |

8. Click **Submit**.
9. Note down the process ID.
10. Close the page and search for the process using the process ID.

11. Open the log file in another browser or tab.

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

View the log file to review information on the assignment processing, the matching territories found, matching territories that were dropped because they were parent territories, and the final territories assigned.

#### Related Topics

- [Batch Assignment Diagnostic Log](#)

## Batch Assignment Diagnostic Log

When you run batch assignment in diagnostic mode, an output log is generated with details of the assignment processing. You can use these details to troubleshoot any issues with territory assignment.

The log helps you understand why certain leads or opportunities weren't assigned to your territories as expected. This table provides an example of a lead batch assignment diagnostic run of territory-based assignment with rule filtering for a lead. It includes an explanation of each section of the log.

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

| Example Log File Entries                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The assignment processing is in diagnostic mode. Assignment results won't be stored. The following number of work objects will be processed: 1.                                                                                                                                                                                                                                                                                                                                                                             | Provides a summary of the assignment processing and the number of work objects to be processed.<br><br>You can change the number of work objects allowed to be processed in diagnostic mode through the MOW_DIAG_MODE_WO_LIMIT profile option. The default setting is 1.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| The process 63034 started at time Wed, July 13 05:48:54 and is processing the following number of work objects: 1.<br><br>Work Object = Lead_Work_Object_Lead<br><br>Candidate Object = Territory_Candidate_Object_Lead<br><br>Assignment Mode = Territory<br><br>View Criteria Name = LeadAssignmentDiagnosticVC<br><br>View Criteria Bind Values = BindLeadNumberDiag= 108970<br><br>Rule Category Name = ORA_Sales_Lead_Territory_Rule_Category<br><br>Replace Team = true<br><br>Maximum Sub Processes per Process = 10 | Lets you confirm the objects being processed in this batch, for example territories being assigned to leads, the type of assignment processing, and the other parameters and their values relevant for this batch process. Indicates the following: <ul style="list-style-type: none"><li>• The process has started.</li><li>• Work object being processed and the candidates being found.</li><li>• Type of assignment processing:<ul style="list-style-type: none"><li>◦ Territory is territory assignment</li><li>◦ Matching is assignment using rules</li><li>◦ Score is scoring</li><li>◦ Classification is ranking or qualification</li></ul></li><li>• View criteria and bind value in leads which determine the set of leads that are included in this batch assignment process.</li><li>• Diagnostic mode setting.</li></ul> |

| Example Log File Entries                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Metric Logging Interval = 0</p> <p>Test Data Parameters =</p> <p>Diagnostic Mode = true</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| <p>Matching request for work object Lead_Work_Object_Lead with the identifier 108970 and candidate object Territory_Candidate_Object_Lead is in process. (MOW-225169)</p> <p>Geography Identifier = 4, Customer Primary Address=310 Park Ave SE Ste 2c5, OLYMPIA, WA 98504-0001</p> <p>Party ID = 999997551079430</p> <p>Lead Number = 108970</p> <p>Customer ID = 999997551079430</p> <p>Industry Classification code= 2900</p> <p>Organization Size = VERY_SMALL</p> <p>Organization Type = null</p> <p>Geography Identifier = 15</p> <p>Custom Account Indicator = null</p> <p>Account = A. C. Network (Olympia, US)</p> <p>Sales Account Type = NAMED</p> <p>Sales Channel = ZPM_DIRECT_CHANNEL_TYPES</p> <p>OrgTp, Classification Code = A: PS-SL; T: PS-SL</p> <p>Primary Partner Identifier = null</p> <p>Acct, Customer ID = 999997551079430</p> <p>Prospect Account Indicator = null</p> <p>Sales Account Indicator = Y</p> <p>Auxiliary Classification Code 2 = OFN1</p> <p>Auxiliary Classification Code 3 = LANG-12113</p> <p>Industry Classification Code = 2900</p> <p>Auxiliary Classification Code 1 = CORPORATION</p> <p>Named Sales Account = Y</p> | <p>Provides a summary of the active assignment attributes and their values that will be used in the processing of this lead.</p> <p>Only a subset of these attributes may be used in the assignment processing of a lead, for example lead ranking rule may only use the score and time frame attributes.</p> <ul style="list-style-type: none"> <li>• Values for the work object.</li> <li>• Attributes that are null.</li> <li>• Attributes that indicate the type of lead being processed. For example, Sales Account Indicator = Y</li> </ul> <p>Use this information to confirm the data values for the work object that may be used in the assignment processing.</p> |

| Example Log File Entries                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Description                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Score = null                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                                                                                                                                                                                                                                                                                                   |
| <p>Assignment matching using mapping set Mapping Set 1 is in process. (MOW-225185)</p> <p>Assignment mapping values were retrieved. (MOW-225211)</p> <p>Function Code = Geo,Geography Identifier = 4,Customer Primary Address = 310 Park Ave SE Ste 2c5,OLYMPIA, WA 98504-0001</p> <p>Function Code = CSize,Organization Size = VERY_SMALL</p> <p>Function Code = AcTyp,Sales Account Type = NAMED</p> <p>Function Code = Indst,Industry Classification Code = 2900</p> <p>Function Code = Acct,Customer ID = 999997551079430</p> <p>Function Code = OrgTp,Classification Code = A: PS-SL; T: PS-SL</p> <p>Function Code = SChnl,Sales Channel = ZPM_DIRECT_CHANNEL_TYPES</p> | <p>Shows the active assignment mappings that drive territory-based assignment for this lead. Also shows the value for each mapping.</p> <p>If an unexpected territory or set of territories has previously been assigned to the work object, then confirm that this is the information you expected to be used for this lead.</p> |
| <p>Assignment mapping values were translated to sequence values. (MOW-225212)</p> <p>Function Code = CSize,Translated values = (7,7)</p> <p>Function Code = Indst,Translated values = (26,26)</p> <p>Function Code = SChnl,Translated values = (1,5)</p> <p>Function Code = Acct,Translated values = (999997551079430)</p> <p>Function Code = AcTyp,Translated values = (1,1)</p> <p>Function Code = Geo,Translated values=(4, WA),(999984000001036,Pacific),(999984000001009,West),(1,United States),(999984000000008,North American Sales),(999984000000004),(ANY)</p> <p>Function Code = Prod,Translated values = (1,999999999999999)</p>                                  | <p>This section is relevant for Oracle Support to troubleshoot assignment issues.</p>                                                                                                                                                                                                                                             |

| Example Log File Entries                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Function Code = OrgTp,Translated values = (77,77)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| <p>Candidate matches were identified. Post processing is in progress. (MOW-225210)</p> <p>The territory with the attribute name Territory Number and attribute value 5377182 was deleted because it's a parent. (MOW-225209)</p> <p>The territory with the attribute name Territory Number and attribute value 282312 was deleted because of an exclusion. (MOW-225208)</p>                                                                                                                                                                                                                            | <p>Indicates that matching candidates were found and lists the matching candidates that were dropped since they're either parent candidates or part of excluded territories.</p> <p>If this lead was assigned previously and the territory you expected wasn't assigned, then review this list of dropped territories. The territory might have been dropped because it was a parent territory and a lower level territory under this also matched. Alternatively, this territory might have been excluded for this lead (for example, a partner might have rejected this lead) or the territory might have an exclusion coverage that contains the account on this lead.</p> |
| <p>The final matching candidates for mapping set Mapping Set 1 were identified. (MOW-225207)</p> <p>Territory Number = 83,Territory ID = 100000013157305</p> <p>Territory Number = 473,Territory ID = 100000013157417</p> <p>Territory Number = 69095,Territory ID = 100100051383477</p> <p>Territory Number = 496,Territory ID = 300100003212620</p> <p>Territory Number = 95,Territory ID = 300100003282208</p> <p>Territory Number = 45,Territory ID = 300100004466888</p> <p>Territory Number = 233,Territory ID = 300100004466906</p>                                                             | Shows the final list of matching territories.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| <p>Matching request for work object Lead_Work_Object_Lead with the identifier 142802 and candidate object Territory_Candidate_Object_Lead is in process. (MOW-225169)</p> <p>Assignment processing using rule set RS12 is in progress. (MOW-225202)</p> <p>Candidate matches were identified. Post processing is in progress. (MOW-225210)</p> <p>The final matching candidates for rule set RS12 were identified. (MOW-225201)</p> <p>The following number of candidates was returned for the matching request for work object Lead_Work_Object_Lead with the identifier 142802: 63. (MOW-225170)</p> | If territory-based assignment with rule filtering was used, this section shows the rule set processing.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

| Example Log File Entries                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | Description                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The assignment of the following number of candidates to work object Lead_Work_Object_Lead with the identifier 142802 is in process: 63. (MOW-225167)                                                                                                                                                                                                                                                                                                                                                                            |                                                                                                                                                                                                                                                                                                                                                                                     |
| <p>The existing candidates were identified. (MOW-225200)</p> <p>Territory Number = 335</p> <p>Territory Number = 274</p> <p>Territory Number = 32</p> <p>The following number of existing candidates were removed from the work object Lead_Work_Object_Lead with the identifier 142802: 13. (MOW-225181)</p> <p>Territory Number = 274</p> <p>Territory Number = 32</p> <p>Territory Number = 220</p> <p>Assignment disposition for work object Lead_Work_Object_Lead with the identifier 142802 is complete. (MOW-225166)</p> | If the lead was previously assigned, this section shows the existing territories as well as shows any territories that no longer match and therefore are going to be removed from the lead.                                                                                                                                                                                         |
| <p>The lead assignment post processing has started.</p> <p>The lead reassign value is set to N and assignment status is set to Assigned as part of lead assignment post processing.</p> <p>The lead last assignment post processing date and time is set at 2016-08-11 06:31:09.0.</p> <p>The lead assignment post processing has been completed.</p>                                                                                                                                                                           | Shows the leads post processing information, such as lead reassigned indicator is set to No, and that the last assigned date and time is set.                                                                                                                                                                                                                                       |
| <p>Assignment matching using mapping set Mapping Set 2 is in process. (MOW-225185)</p> <p>The mapping set Mapping Set 2 was skipped as the conditional attribute Primary Partner Identifier is blank. (MOW-225206)</p>                                                                                                                                                                                                                                                                                                          | <p>Shows the progress of assignment matching for a mapping set.</p> <p>In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 2) has a conditional attribute defined. For this lead, this attribute doesn't contain a value, and so the territory matching for this mapping set isn't needed and therefore isn't performed.</p> |
| Assignment matching using mapping set Mapping Set 3 is in process. (MOW-225185)                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Shows the progress of assignment matching for a mapping set.                                                                                                                                                                                                                                                                                                                        |

| Example Log File Entries                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Description                                                                                                                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| The mapping set Mapping Set 3 was skipped as the conditional attribute Prospect Account Indicator is blank. (MOW-225206)                                                                                                                                                                                                                                                                                                                                                                                                                                  | In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 3) has a conditional attribute defined. For this lead, this attribute doesn't contain a value, and so the territory matching for this mapping set isn't needed and therefore isn't performed.                                                                            |
| <p>Assignment matching using mapping set Mapping Set 4 is in process. (MOW-225185)</p> <p>The mapping set Mapping Set 4 was skipped as the conditional attribute Custom Account Indicator is blank. (MOW-225206)</p>                                                                                                                                                                                                                                                                                                                                      | <p>Shows the progress of assignment matching for a mapping set.</p> <p>In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 4) has a conditional attribute defined. For this lead, this attribute doesn't contain a value, and so the territory matching for this mapping set isn't needed and therefore isn't performed.</p> |
| <p>Assignment matching using mapping set Mapping Set 5 is in process. (MOW-225185)</p> <p>The mapping set Mapping Set 5 was skipped as the conditional attribute SimlifiedLeadFlag is blank. (MOW-225206)</p> <p><b>Note:</b><br/>A sales lead is one where an existing account and contact is associated to the lead. A simplified lead is one where the lead has either a new account or a new contact associated with it. When the flag SimlifiedLeadFlag is set to Yes for a simplified lead, this means the <b>Mapping Set 5</b> becomes active.</p> | <p>Shows the progress of assignment matching for a mapping set.</p> <p>In this example, there are multiple active mapping sets and the next mapping set (for example, Mapping Set 5) has a conditional attribute defined. For this lead, this attribute doesn't contain a value, and so the territory matching for this mapping set isn't needed and therefore isn't performed.</p> |
| The total number of work objects processed: 1. Number of work objects successfully processed: 1. Number of work objects failed: 0. (MOW-225127)                                                                                                                                                                                                                                                                                                                                                                                                           | Provides summary of how many work objects were successfully processed and how many failed.                                                                                                                                                                                                                                                                                          |

### Related Topics

- [Example of Running Lead Batch Assignment in Diagnostic Mode](#)

## Run Diagnostic Test for Territory Data Used by Assignment Manager

You can use territory management to generate a report that shows the dimension and sequence details for territory dimensions defined for territories. Review the report to troubleshoot issues in territory assignment processing.

This topic explains how to run and generate this report, and shows an example of the report.

## Run and Generate the Diagnostic Test Report

Here's how to run diagnostic test for territory data used by assignment manager:

1. Navigate to Territories.
2. Find the territories whose data you want to view and note down the territory numbers.
3. Click the **Run Diagnostic Tests** link from the **Settings and Actions** list.
4. On the Diagnostic Dashboard, search for **Test for Data Used by Assignment Manager** in the **Test Name** field.
5. Select the test and click **Add to Run**.
6. Click the Warning icon to enter the parameters.
7. On the Input Parameters dialog box, enter the parameters in the **New Value** field as shown in the following figure.

**Input Parameters** ?

Test Name: Test for Data Used by Assignment Manager  
Edit Input Set

View ▾ Defaults Input Set ▾ Load Save... Detach

| Value Required | Display Name      | Include                             | New Value                 | Default Value |
|----------------|-------------------|-------------------------------------|---------------------------|---------------|
| ✓              | Territory Numbers | <input checked="" type="checkbox"/> | CDRM_300,CDRM_123,CDRM_43 |               |

**Note:** If you're running the report for multiple territories, enter the territories without spaces. For example, CDRM\_300,CDRM\_123,CDRM\_43. If you enter spaces, the report is run only on the first territory.

8. On the Choose Test to Run and Supply Inputs dialog, enter the **Run Name** and click **Run**.
9. On the Test Run Submitted dialog box, click **OK**.
10. On the Diagnostic Test run Status, click the Report icon on the relevant report row.
11. Review the report details.

For further assistance with troubleshooting, share the report with Oracle Support, along with the assignment diagnostic log files.

## About Purging Batch Assignment Information

When a batch assignment job runs, it creates data as part of the assignment process. Once the job completes, the data is no longer required and can be purged.

The scheduled process **Purge Batch Assignment Information** is used to purge the batch assignment tables based on set parameters. A batch assignment process creates data in two tables: MOW\_BATCH\_ASGN\_JOBS and MOW\_BATCH\_ASGN\_JOB\_ITEMS. With time, records in these tables grow substantially, especially with large implementations. The purge batch assignment information process clears old records for successfully completed processes. The process purges data for batch assignment processes for leads, opportunities, accounts, and so on.



Run this process periodically or as needed. The process has only one parameter **Days to Keep**. The default value is 30.

Specify the number of days worth of assignment batch job and data to keep until the next purge. For example, if you set the parameter to 15, the process removes all rows related to successfully completed processes in the batch assignment data table that were created before 15 days from the current date.

## Territory Dimension Data Report

The territory dimension data report identifies the volume of territory data for each territory dimension and coverage type. You can use information from this report to determine the sequence for each assignment mapping and optimize assignment performance.

You must run this report only after you have created and activated your production territories.

Access the Diagnostic Dashboard to generate the territory dimension data report. The report shows the number of denormalized customer account-centric and partner-centric territory records for each territory dimension and coverage type. The function code field is used to specify a unique identifier for the attribute. Where dimensional territory coverage isn't defined, the report shows the counts for inherited customer and partner inclusions and exclusions that are manually defined.

This table shows an example of a territory dimension data report:

| Function Code | Count for INCLUSION | Count for EXCLUSION | Count for PARTNER_<br>REGULAR | Count for REGULAR |
|---------------|---------------------|---------------------|-------------------------------|-------------------|
| AcTyp         | 7                   | 3                   | 16                            | 305               |
| Acct          | 0                   | 0                   | 16                            | 313               |
| Aux1          | 7                   | 3                   | 16                            | 385               |
| Aux2          | 7                   | 3                   | 16                            | 385               |
| Aux3          | 7                   | 3                   | 16                            | 385               |
| CSize         | 7                   | 3                   | 13                            | 336               |
| Geo           | 7                   | 3                   | 2                             | 4                 |
| Indst         | 7                   | 3                   | 14                            | 268               |
| OrgTp         | 7                   | 3                   | 14                            | 374               |
| Prod          | 2                   | 3                   | 16                            | 171               |
| Prtnr         | 7                   | 3                   | 16                            | 385               |

| Function Code | Count for INCLUSION | Count for EXCLUSION | Count for PARTNER_<br>REGULAR | Count for REGULAR |
|---------------|---------------------|---------------------|-------------------------------|-------------------|
| Schnl         | 7                   | 3                   | 16                            | 259               |

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

1. Copy the report to a spreadsheet.
2. Sum up the count for inclusion, exclusion, partner\_regular, and regular for each function code.
3. List the function codes in order from lowest total count to highest.

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

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

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

*Related Topics*

- [Example of Generating Assignment Reports](#)

## FAQs for Assignment

### Frequently Asked Questions (FAQs) for Assignment

This section contains the most frequently asked questions (FAQs) when setting up Assignment. Scroll or search to find answers to common questions.

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

Territory-based assignment is the primary means of assignment for your sales application objects, such as accounts, leads, and opportunities. For territory-based assignment, while creating the assignment object, you create work object to candidate object mapping sets that are used to make candidate assignments.

You can use rule-based assignment to identify supplemental resources or filter the matching territories. You can also use rules to score work objects and for classification. For rule-based assignment, you use the rules editor to create expression-based rules that the assignment feature uses to make candidate assignments.

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

In a rule-based assignment scenario, you create rules with conditions that must be met to make the appropriate resource assignments. For example, a rule is created with the condition that when the opportunity risk level is high, a resource located in the state of California is assigned.

*Related Topics*

- [What types of assignment rules can I create?](#)

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

When you mark an assignment object as inactive, the selected work or candidate assignment object isn't available for assignment processing. When you mark an assignment attribute as inactive, the selected work or candidate object attribute isn't available for assignment processing.

**Note:** The object or attribute can't be set to inactive if there is a mapping set, mapping, or rule defined using the object or attribute.

## How can I display workflow notifications for Assignment Manager batch process jobs?

You can display object workflow notifications for assignment manager batch jobs to alert you of job completions for your specified assignment manager objects.

Change the Suppress Events for Assignment Processing in Batch Mode (ORA\_MOW\_ASGN\_SUPPRESS\_EDN\_EVENTS) profile option value to N at both the site and product levels for your selected sales objects. This profile option applies only to email notifications that are sent as part of Assignment Manager workflow tasks. Bell notifications aren't affected. The current value is set to Y which hides all batch assignment process workflow notifications.

You can choose to turn on or off this profile option at the product level. For example, you might want to have workflow notifications for all Opportunity batch assignment jobs but want to hide all notification for batch Account assignment jobs. Note that the workflow notifications can't be suppressed if the assignment is processed using the Run Assignment option from the UI.

## When are territories assigned to accounts?

Internal territories are assigned to accounts in the following scenarios.

- When accounts are created.
- When a sell-to address is added to an existing sales party.
- When accounts are imported in bulk.
- When certain attributes on accounts that correspond with territory assignment dimensions are updated.
- When batch assignment is run.
- When you select the Assign Territories menu action on the Sales Account Team node for the account
- When territories are realigned or when personnel leave the territory or the company.
- When a sales manager reassigns all of the sales representative's account to a different owner that triggers the reassignment of territories for those accounts to the new owner.

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

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

Automatic assignments are always enabled following an import, party merge and territory realignment. During initial implementation and migration, it's possible to create accounts before territories have been set up in the application. These accounts won't receive any territory assignment because there are no territories. These accounts need to be explicitly assigned when territories are configured and activated in the application. This is one exception which doesn't have immediate/automatic assignment. The recommendation is to run a batch assignment to assign these accounts created at the beginning of the implementation using the view criteria `SalesAccountsUpdatedSinceVC`.

When you make a field conditionally required on an account, then add the following groovy script before adding your business logic:

```
if (userName=='FUSION_APPS_CRM_SOA_APPID' || userName()=='FUSION_APPS_CRM_ESS_APPID')  
return false
```

Partner territories get assigned to accounts in the following scenarios.

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

**Note:** Territory Management must be implemented to use this feature.

#### *Related Topics*

- [Overview of Account Assignment Profile Options](#)
- [Account Territory Member Access](#)
- [How can I add territories to an account?](#)
- [Account Team Member Access Levels](#)

## How can I add territories to an account?

Sales assignment capabilities match territories and accounts based on assignment setup. An account can also be assigned to one or more internal and partner territories.

You can assign internal territories, such as Prime, Overlay, as well as Sales Channel Manager territories, matching a given account's assignment attributes, to the account. By default, Internal territory assignment runs immediately and automatically whenever account assignment or reassignment is required. For example, you can run assignment processing when you create or update an account.

You can run territory assignment when viewing or editing your accounts. Just navigate to your account details, verify relevant attributes like address, industry, and so on, and run the assignment process manually using the Actions button.

Additionally, you can run account assignment in a batch on a scheduled or one off basis, or following a territory realignment.

Partner territories are applicable to sales partner management implementations. When you approve a partner lead, any partner territories associated to the lead are automatically assigned to the lead's account. Channel managers can also select specific partner territories to assign to an account with the Add Partner Territories action on the Account Team page.

**Note:** You can also enable automatic assignment of imported accounts. See the related topics for more information.

#### *Related Topics*

- [When are territories assigned to accounts?](#)
- [Schedule Account Assignment](#)
- [How Dimensions Define Territories](#)

## Can I use Rule-Based Assignment (RBA) to assign resources for Accounts?

No, rule based resource assignment for Accounts isn't supported. Rule-based assignment can be used to assign resources to opportunity and lead teams.

Use territories to assign resources and secure access to accounts. Alternatively, create custom access groups and add resources as members, and then define the rule or rules that assign an access group to each account.

## Why is my Territory assignment job taking more time than usual to complete?

The time taken by a job depends on the number of records affected in an assignment. The job may run slow due to the latest changes in the territories that caused more accounts to be eligible for re-assignment.

Always run the full assignment after making territory changes and allow the job to complete. The first run with a full assignment may take a long time. However, the subsequent runs end faster than the initial full assignment run.

## How are territories assigned to opportunities?

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

When the assignment engine assigns territories to opportunity product lines, the territory owner is also copied to the opportunity team.

Profile options set by the administrator determine the following:

- Whether, when a territory is assigned to an opportunity product line, all territory team members are also copied to the opportunity team, in addition to the territory owner.
- Whether the assign opportunity action is available from within an opportunity for salespeople to run assignment.
- Whether the application runs assignment when salespeople save an opportunity.

**Note:** With partner integration, partner territories (territories whose sales channel dimension is equal to Partner) aren't assigned to product lines. Partner organizations can only be associated with an opportunity manually, or they can be automatically associated through an approved lead registration.

#### *Related Topics*

- [About Sales Resources and Opportunity Assignment](#)
- [Overview of Territory Account Assignment](#)

## How do I assign team members automatically to an opportunity?

While editing an opportunity, from the Actions menu, select Save and Run Assignment.

You must have Full access to the opportunity to see the Save and Run Assignment action.

**Tip:** You can view assigned territories and the associated territory team members on the opportunity team in the opportunity Team pages.

#### *Related Topics*

- [Why can't I assign an opportunity?](#)

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

You can manually assign territories to one or more additional salespeople on a product line in order to allow another salesperson working the deal to forecast it in his territory.

Manual assignment may be required, for example, to even out a temporary unbalanced load between salespeople reporting to a manager, or to accommodate a salesperson on extended vacation. You manually assign territories in the assign sales credit screens or in the details of the revenue line by using the territory list of values.

You must have the Sales Administrator job role to perform manual territory assignment on opportunities.

## Which fields in an opportunity drive assignment?

The following fields drive opportunity assignment: Account, Sales Channel, Product, and Partner (for assigning partner-centric territories).

Other, peripheral, account and partner attributes also drive assignment, but aren't captured or displayed in the opportunity. Examples of these other attributes include: Primary Address (Geography), Named/Not Named (Account Type), Industry, Organization Type, Partner Type, Organization/Customer Size, and the Auxiliary 1-3 Classifications.

## Why can't I assign an opportunity?

You must have Full permission on an opportunity to see the Save and Run Assignment action.

Note that a profile option determines whether the assignment action is available in opportunities.

### *Related Topics*

- [How do I assign team members automatically to an opportunity?](#)

## What's lock assignment?

The Lock assignment check box is automatically selected when you run a manual assignment from the UI. Lock assignment prevents a salesperson from being automatically removed from an opportunity through the assignment engine.

Only users with Full access on the opportunity can select or deselect the Lock Assignment check box for sales team members. Resources are assigned automatically to an opportunity during an automatic assignment process or through a groovy script.

When the lock assignment is selected, an automatic territory assignment can't remove any sales account team resources or team members. If the lock assignment is deselected, team members may be replaced if they no longer match the assignment rules.

**Note:** The Lock Assignment check box is not available by default and must be added to the Team subtab within the Edit Opportunity page using Application Composer. See the next section for more information.

## Extending Pages for Opportunities Using Application Composer

1. In a sandbox, navigate to **Configuration > Application Composer**.
2. In the object tree, select **Opportunity > Pages > Application Pages**.
3. Go to the Create Opportunity page and duplicate the standard layout.
4. Edit the layout.
5. In the Configure Detail Form region of the Opportunity Create page, move the Lock Assignment field from the Available Fields to the Selected Fields list.
6. Save your changes.



7. Publish the sandbox according to your company's business practices.

## What's deal protection?

With the deal protection feature, all salespeople are automatically protected from being removed from a product line for which they're receiving sales credit, or from the opportunity team, when territory realignment happens.

Deal protection applies to sales resources that get automatically assigned to product lines as credit recipients or to the opportunity team using territory-based assignment.

A profile option set by the administrator specifies the default number of days for which salespeople are protected. An opportunity team member with Full access level can override the dates for which the protection is active.



# 15 Accounts and Contacts

## Overview of Accounts and Contacts

After you enable the capabilities of account data management, salespeople can use their Accounts pages to manage their sales accounts. The sales account information includes their customers, prospective customers, and individual contacts.

Here's what salespeople can do with the account data management capabilities:

- Create and update accounts, prospective accounts and contacts.
- Maintain account data and view data in hierarchical fashion.
- Enrich customer data.

Use the customer data management capabilities to:

- Prevent and identify duplicate data: Administrators identify duplicates during real time or in a preconfigured batch. They search and match real-time accounts and contacts to prevent the creation of duplicate data. Potential duplicate data is identified based on preconfigured matching configurations.
- Verify and standardize addresses: Administrators perform real-time and batch address cleansing for account or contact address information. They verify and cleanse addresses within an import batch during import. Address validation is used in context of master geography data, address cleansing in context of Customer Data Management, address cleansing batch and address verification in real-time on account or contact pages.
- Resolve duplicate data: Administrators merge and link duplicate records to create master records that are the single source of truth. They can de-duplicate within an import batch and within the entire database. Customer data management uses a data quality engine to consolidate high-quality account and contact data from multiple sources, manage duplicate data, enhance data with third-party content, standardize addresses, and monitor data quality. These data quality checks ensure cleansed, enriched, and complete customer information that can be trusted by the sales team.

**Note:** A competitor is an Account with Competitor party usage. Thus, every time a competitor is created or updated, servers scripts run, as defined for the Account object. If you don't want the account triggers to execute during the competitor flow, then adjust the Groovy server scripts in the Account object to not execute in the case of Competitor party usage.

For more details on the implementation of customer data management, see the *Implementing Customer Data Management for CX Sales and Fusion Service* guide. Also see the *accounts* topics in the *Implementing Sales* guide.

## Data Management

### Enable Display of Multiple Addresses

The edit pages for accounts, contacts, households, and partners automatically display a primary address region. However, you can change the view to display a table that lists multiple addresses.

## How Address Details Display

Address details for accounts, contacts, households, and partners display on their respective Profile subtabs in edit mode.

The Primary Address region displays on the Profile subtab for an account record. This is the default view of address details. Use Application Composer to display multiple addresses instead of just one primary address region.

## Considerations for Configuring Address Display Tables

Consider these points before you let the table display multiple addresses.

- In Application Composer, you must ensure that only one of the address regions is exposed at a time in the Detail pages layout. For example, expose Primary Addresses or Multiple Addresses on the page, but not both at the same time.
- The default type for Address is bill-to. You can configure the default address type using Default Address Type for Account and Default Address Type for Contacts profile options.
- An account can have one or more sell-to addresses (or address type as sell-to). Account territory assignment is based on the primary address, and the primary address can be any type, such as sell-to or bill-to.
- The default type when creating an account is Prospect. You can change the default type using the Account Type Default profile option. Similarly, you can use the Contact Type Default profile option to configure the default type when creating a contact.

## Enable the Multiple Addresses Table

Use this procedure to enable the table that displays multiple addresses:

1. Ensure you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.
3. In the Objects navigation tree, expand **Standard Objects** and then expand the object whose pages you want to modify. For example, select the **Account** object.
4. Click the **Pages** node.
5. Ensure that the **Application Pages** tab is selected for either the account, contact, household, or partner object.
6. In the Details Page Layouts region, edit the relevant layout.

If none exists, then duplicate the standard layout using the duplicate layout icon, and edit the resulting layout.

7. In the Details Layout page, click the **Profile** tab.

In the Primary Address region and Multiple Address region, do one of the following:

- a. Click **Hide** to hide the region at runtime.
- b. Click **Show** to show the region at runtime.

For example, to enable the display of multiple addresses, click **Hide** in the Primary Address region, and click **Show** in the Multiple Address region.

8. Click **Save and Close**, then **Done**.
9. Publish the sandbox according to your company's business practices.

## Enable Address Usage Types for Accounts

You can assign usage types, such as bill to, sell to or ship to, to the account addresses. For that you must enable the Type field in the Creation layout of the Address page.

You can assign address usage types to the following account types:

- Account
- Contact
- Household

The following address usage types can be assigned:

- Bill to
- Ship to
- Sell to

### Enable Address Usage Type on Creation Layout

Here are the steps to enable the address usage type on the Creation Layout:

1. Ensure you're working in an active sandbox.
2. Go to **Application Composer > Objects > Standard Objects > Address > Pages**.
3. In the Application Pages tab, click the duplicate icon under the Creation Page Layouts section.
4. In the Duplicate Layout window, give a name to the custom layout and click **Save and Edit**.
5. On Creation Layout, click the edit icon beside **Create and Edit Address**.
6. Under Configure Detail Form, select **Type** from **Available Fields** and move it to **Selected Fields**.
7. Click **Save and Close**.
8. Publish the sandbox. Salespeople can now see the Type field that shows the three address usage types in the Create Contact page. They can mark a contact address as Bill to, Ship to, or Sell to, based on the usage of the address.

### Set a Default Address Usage Type

You can set one of the address usage types (Bill to, Sell to, and Ship to) as a default value for the Type field shown in the Create and Edit pages of Accounts, Contacts, and Households, using these profile options:

- Default Address Type for Accounts (ZCA\_ADDRESS\_PURPOSE\_DEFAULT)
- Default Address Type for Contacts (ZCA\_CONTACT\_ADDRESS\_PURPOSE\_DEFAULT)
- Default Address Type for Households (ZCA\_HOUSEHOLD\_ADDRESS\_PURPOSE\_DEFAULT)

Let's look at the steps to add a default address type for Accounts. The procedure is same for the other profile options.

1. In the Setup and Maintenance work area, use the Manage Administrator Profile Values task:
  - **Offering:** Sales
  - **Functional Area:** Sales Foundation
  - **Task:** Manage Administrator Profile Values

2. On the Manage Administrator Profile Values page, search for the profile option code, **ZCA\_ADDRESS\_PURPOSE\_DEFAULT**.
3. Choose a suitable profile value for **Site**: Bill to, Sell to, and Ship to. Save the changes.
4. Sign in again for the changes to take effect.

## How do I configure address regions for accounts and contacts?

You use the Address object in Application Composer and the Manage Address Formats task in Setup and Maintenance to configure address regions for accounts and contacts.

You can add or remove custom fields or standard fields (such as Type, D-U-N-S Number, Site Name, Site Number, and so on) in the address region.

**Note:** Use Application Composer to add or remove fields in the address region. We recommend that you don't use the Page Composer for this purpose.

Location-specific fields (such as Address Line1, Address Line2, City, State, Postal Code, and so on) need to be managed using the Manage Address Formats task in Setup and Maintenance. The fields configured in the Manage Address Formats task can't be managed using the Application Composer.

When creating or editing accounts or contacts, salespeople can't save addresses by entering only address fields – they must also enter location-specific fields. This rule applies to both standard and custom mandatory attributes on the Address object that have been exposed using Application Composer.

To display the address region in a collapsed manner, select the Disclosed option of the address component on the page composer.

## Set Up the Mapping Service for Contextual Addresses

A contextual address is marked with an orange triangle, the More icon. When users hover over the triangle, an icon appears, which they can click to display the address on a map.

### Set Up Mapping Service

You can specify the mapping service to be used to display the map.

1. In the Setup and Maintenance work area, go to the **Manage Application Toolkit Administrator Profile Values** task in the Application Extensions functional area.
2. Search for the Mapping Service for Contextual Addresses (ATK\_CONTEXT\_ADDRESS\_MAP\_OPTION) profile option.

3. In the Profile Values section, enter a full URL of a mapping service in the **Profile Value** field.

**CAUTION:** By default, the **Profile Value** field is blank. Until you enter a valid value for this profile option, users continue to get an error when they try to open a map for any contextual address.

Here are a few examples of mapping service URLs:

- `http://maps.google.com/maps?output=embed&q=`
- `http://maps.live.com/default.aspx?where1=`
- `http://bing.com/maps/?v=2&encType=1&where1=`

**Tip:** You can include parameters in the URL. For example, to avoid a locator box in Google Maps, you can add `&iwloc=&amp;` to the URL. So, the mapping service URL you would enter in the **Profile Value** field is: `http://maps.google.com/maps?iwloc=&amp;&output=embed&q=`

#### Related Topics

- [Set Profile Option Values](#)
- [Why can't I see the map for contextual addresses?](#)

## How do I display the country in the address field?

By default, if the name of the country selected in the user profile and the name of the country in the address are the same, the country is not displayed on the address field of an account or contact.

For example, US is set as the country in your user profile and the billing address is also US, then the billing address is displayed without the country name US.

To see the country selected in the user profile go to User Profile and click **Set preferences > General Preferences > Regional > Territory**

You can change this behavior in the account and contact addresses using the Regional Country in Address Formats Included profile option.

Perform the following steps to change the profile option value:

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for Manage Administrator Profile Values task and open it.
3. Search for Regional Country in Address Formats Included profile option using the profile option code `ORA_HZ_INCLUDE_REGIONAL_COUNTRY`.

If the profile value of the `ORA_HZ_INCLUDE_REGIONAL_COUNTRY` profile option is set to yes and the country name set in the user profile is the same as the country in the address, then the country name is displayed.

If the profile value of the `ORA_HZ_INCLUDE_REGIONAL_COUNTRY` profile option is set to no and the country name set in the user profile is the same as the country in the address, the country name isn't displayed.

4. Click **Save and Close**.

## Display Account Currency for Opportunities on Account Overview Page

The opportunity summary box on the account overview tab displays the total amount of open opportunities in the corporate currency by default. However, for salespeople to view the amount in the currency where that account is located, you must perform a few setup steps.

Salespeople can associate the currency when they create an account. They can also view and update the currency from the edit account profile tab.

Here are the high-level setup steps:

1. Opt-in to the feature using the Change Feature Opt In link.
2. Set the profile option Use Object Currency for Account to Yes. The default value is No.
3. Add the currency field to the create and edit account pages using Application Composer.

Here's how to opt in and change the profile option.

1. Sign in as a setup user.
2. In the Setup and Maintenance area, go to the **Sales** offering.
3. Click the **Change Feature Opt In** link in the Functional Areas row.
4. On the Opt In: Sales page, click the pencil icon in the Features column in the Accounts and Contacts row.
5. On the Edit Features: Accounts and Contacts page, select the **Enable** check box for Use Account Currency for Opportunity Summary on Account Overview Page feature.
6. Click **Done**.
7. Click **Done** on the Opt In: Sales page and return to the Setup: Sales page.
8. To change the profile option, go the following:
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
9. Search for the profile option, Use Object Currency for Amount in the Profile Display Name field.
10. Select **Yes** in the Profile Option Value field.
11. Click **Save and Close**.
12. Enable the currency field on the create account page and the account profile tab using Application Composer.
13. Verify that the currency field is enabled on the create account and the edit account pages.

### Enable the Currency Field

Enable the currency field on the create account page and the account profile tab using Application Composer.

1. In an active sandbox, click **Navigator > Configuration > Application Composer**.
2. In the Objects navigation tree, expand Standard Objects, Account, click the **Pages** node and ensure that the Application Pages tab is selected.
3. Edit the creation and details layouts to open the Configure Detail Form page. Here's how you edit the layouts.
  - a. On the Creation Page layouts region, duplicate the standard layout by highlighting the standard layout and clicking the duplicate icon.
  - b. Enter a new layout name and click **Save and Edit**.
  - c. On the Creation Layout page, click the **Edit** icon.
  - d. On the Details Layout page, click the **Profile** subtab for the field to display on the profile page.
  - e. In the Subtabs Region, click the **Edit Summary Subtab** icon.



4. On the Configure Detail Form page, move **Currency** from the Available Fields window to the Selected Fields window.
5. Click **Save and Close**.
6. On the Details Layout page and the Creation Layout page, click **Done**.

## Resolve Duplicate Records

This feature lets salespeople resolve duplicate records when creating accounts and contacts.

When duplicate accounts or contacts are found, they're displayed on the Notifications page. When salespeople create a record, they can either ignore the duplicates or select the correct record from the list.

### Search Deduplication

When creating an account or a contact, duplicates are found based on one of these conditions:

- Data quality management configuration for accounts and contacts
- Exact name match profile options

Here's a list of profile options for account and contact deduplication.

| Profile Option Code      | Profile Display Name                | Description                                                                                                                                                                     |
|--------------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ZCM_ACC_DUP_NOTIFICATION | Show Duplicate Account Notification | Controls the display of the account duplicate notification page. Enabled by default.                                                                                            |
| ZCM_CON_DUP_NOTIFICATION | Show Duplicate Contact Notification | Controls the display of the contact duplicate notification page. Enabled by default.                                                                                            |
| ZCM_ACC_EXACT_NAME_MATCH | Exact Account Name Match            | Controls the display of potential duplicate accounts based on an exact name match, when Oracle Enterprise Data Quality doesn't present duplicate accounts. Disabled by default. |
| ZCM_CON_EXACT_NAME_MATCH | Exact Contact Name Match            | Controls the display of potential duplicate accounts based on an exact name match, when Oracle Enterprise Data Quality doesn't present duplicate contacts. Disabled by default. |

**Note:** If data quality isn't configured in your application and you require an exact name only match, then you must enable the ZCM\_ACC\_EXACT\_NAME\_MATCH and ZCM\_CON\_EXACT\_NAME\_MATCH profile options.

### How Account and Contact Deduplication Is Performed

Here's a list of the impact of different combinations of the deduplication profile options.

| Show Duplicate Account or Contact Notification | Exact Account or Contact Name Match | Description                                                                                                                                                                                       |
|------------------------------------------------|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Disabled                                       | Disabled                            | The application doesn't display potential duplicate accounts or contacts.                                                                                                                         |
| Enabled                                        | Enabled                             | When creating an account or a contact, the application shows a list of potential duplicate accounts or contacts, based on the data quality configuration or an exact name match.                  |
| Disabled                                       | Enabled                             | The duplicate notifications page is hidden.                                                                                                                                                       |
| Enabled                                        | Disabled                            | This is the default setting.<br><br>When creating an account or a contact, the application shows a list of potential duplicate accounts or contacts based only on the data quality configuration. |

#### Related Topics

- [How do I identify duplicates?](#)
- [Automerge](#)

## Enable Source System Reference in Accounts

Source system reference is an identifier where the combination of source system and Source system reference is unique that lets you maintain a record of the source of the data in sales applications.

### Reference System Overview

Sales applications may use data from disparate systems running on different databases. When such data is consolidated, the source system reference is maintained using a unique reference key for cross-referencing. You can query the source system using the reference key (unique ID) to get more information about an account from the source system.

Here is an image of the Edit Account: Reference Systems page from where you can add or view reference systems.

| Name                    | ID    | Start Date | End Date  | Comments |
|-------------------------|-------|------------|-----------|----------|
| Right Now Service Cloud | 54567 | 10/1/2012  | 12/1/2014 |          |
| Legacy OC               | 85467 | 10/1/2012  | 12/1/2014 |          |
| SAP PS                  | 85490 | 10/1/2012  | 12/1/2014 |          |

In accounts, you can enable the source system reference by enabling a subtab that contains such cross-references if any.

## Enable Source System References

You use the Reference Systems subtab to view or add source systems. This tab isn't enabled by default, which means that you must explicitly enable the Reference Systems subtab.

Here's how to enable the Reference Systems subtab:

1. Ensure you're working in an active sandbox.
2. Click **Navigators > Configuration > Application Composer**.
3. In the Objects navigation tree, expand Standard Objects and then expand **Account**.
4. Click the **Pages** node.
5. Ensure that the **Application Pages** tab is selected.
6. On the Details Layout page, click the **Reorder Subtabs** icon.
7. In the Configure Subtabs dialog box that appears, move the Reference Systems subtab to the **Selected Subtabs** box.
8. Click **OK**, and then click **Done**.
9. Publish the sandbox according to your company's business practices.
10. Edit a record on the Accounts page and verify the reference systems subtab.

### Related Topics

- [Source System References](#)

# Configure Lists for Accounts and Assets

You can configure the lists of values that appear for accounts, contacts, households, and assets. Extensible lists of values let salespeople search and associate records using data that's relevant to their business needs.

Salespeople can search using standard fields, view the fields in the search results, and then select relevant records.

Here's a list of the configuration options:

- Create dynamic, role-based lists of value layouts
- Enable hidden standard fields for searching within a list of values
- Re-arrange fields in the search and result sections
- Define default values for search fields
- Mark certain fields as read-only or required

For more information on extending lists of values, see the *Configuring Applications Using Application Composer* guide and the topics in this guide on extending accounts and contacts.

## Data Enrichment and Verification

### Two Services to Enrich and Verify Your Data and Save Salespeople Time

Perhaps nothing is more important for your sales effort than having up-to-date and actionable information about your customers and contacts and minimizing the time salespeople spend entering data. Oracle provides two services that enrich your customer data, improve its accuracy, and eliminate data entry time.

For account and contact information, you can obtain information on millions of companies worldwide by subscribing to the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B). A second service, Oracle Address, Email, and Phone Verification, ensures that you have the correct postal addresses, that your emails don't bounce, and your calls go through.

**Note:** Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) is the new name for Data as a Service (DaaS).

Here's an overview of the 2 services:

| Service | Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) | Oracle Address, Email, and Phone Verification   |
|---------|-----------------------------------------------------------------|-------------------------------------------------|
| Purpose | Account and contact search, enrichment, and prospecting.        | Address, phone, and email address verification. |

| Service      | Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Oracle Address, Email, and Phone Verification                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| What It Does | <p>Instead of entering data themselves when they create accounts, salespeople can look up the organizations they sell to from Dun &amp; Bradstreet Corporation, one of the premier sources of business information. The service provides access to more than 347 million account records and more than 135 million contact records worldwide. Included is information about more than 90 different company attributes, including sales volume, growth data, hiring trends, competitors, and so on.</p> <p>Users can also filter the data by using over 60 company or contact attributes such as industry, revenue, company hierarchy, private or public indicator, contact title, contact department.</p> <p>The service also provides information about account hierarchies, showing the linkages between a corporation's subsidiaries, branches, and divisions. You can also schedule account or contact enrichment on thousands of records at the same time.</p> <p>Oracle licenses account and contact enrichment separately. You subscribe to the Oracle Account Enrichment Cloud Service and the Oracle Contact Enrichment Cloud Service.</p> | <p>Salespeople can search and validate addresses in more than 248 countries using data from Loqate.</p> <p>They can verify addresses when creating or editing an account: correct misspellings, add missing elements (such as the postal code), and standardize elements (for example, changing "Drv" to "Dr"). You can also schedule address verification on thousands of records at the same time.</p> <p>The service automatically checks if phone numbers and email addresses exist and informs you if they're invalid. No more bounced emails or calls that don't go through.</p>                                                                                                                                           |
| How It Works | <p>Salespeople start typing the account name, and the application suggests possible matches straight away. Selecting a match automatically fills in all the rest of the information.</p> <p>Salespeople can add contacts to accounts by job role. Selecting the Enrich action for existing accounts gets the latest information.</p> <p>The account and contact information continues to be updated automatically based on synchronization rules setup by your administrator.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | <p>Salespeople start typing the street address in the search field and the application starts suggesting possible matches. Selecting one of the suggestions fills in the rest of the address fields.</p> <p>You can also enable a Verify Address button that salespeople can use to verify addresses for a particular country. That's useful if you added nonstandard fields to the address or if salespeople don't always use the search field to look up an address.</p> <p>You can also verify and update addresses in bulk.</p> <p>The service informs salespeople if phone numbers and email addresses are invalid as soon as they enter them. They can also verify any existing ones to make sure they're still valid.</p> |
| Setup        | <p>After you activate the service, and complete the simple setup described in this chapter in your sales application, salespeople can start looking up and enriching their data right away.</p> <p>To get the most out of the application, however, you must add fields to the UI to expose the additional information you're getting. While most of the information maps onto fields you</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | <p>After you activate the service, and complete the simple setup described in this chapter in your sales application, salespeople can start looking up street addresses and verifying phone numbers and email addresses.</p> <p>In the CX Sales (Classic UI), you can also expose the Verify Address button with a few extra steps.</p>                                                                                                                                                                                                                                                                                                                                                                                          |

| Service                       | Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B)                                                                                                | Oracle Address, Email, and Phone Verification                                                                                                             |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
|                               | can expose using Application Composer, you must create some custom fields to map the rest.                                                                     |                                                                                                                                                           |
| Where to Get More Information | This guide includes the information you need to get started. You can get the full scoop in the Using Account and Contact Enrichment by Dun & Bradstreet guide. | This guide includes the information you need to get started. You can get the full scoop in the Using Oracle Address, Email, and Phone Verification guide. |

### Related Topics

## Undo Enrichment

### Configure Undoing Enrichment for Accounts

In certain scenarios, your sales team may have to undo the enrichment of an existing D&B enriched account and associate it with D&B again to get the right updates for the account.

You need to ensure that data enrichment is already set up and an account is enriched for the Undo Enrichment option to be available for the enriched accounts. Here's how you can verify if data enrichment is enabled:

1. In the Setup and Maintenance work area, use the **Manage Data Enrichment Integration** task:
  - **Offering:** Sales
  - **Functional Area:** Integrations
  - **Task:** Manage Data Enrichment Integration
2. On the Manage Data Enrichment Integration page, ensure that **Enable DaaS** for **Enrichment** is selected.
3. Ensure that the **Enable DaaS** option is selected for **Smart Data**.
4. Ensure that the credentials for DaaS is entered if you have enabled it. If you are using enrichment and smart data of one of them, ensure that the credentials are correctly configured for the respective provider.
5. Save your changes.

Your users can see the **Undo Enrichment** option in the Actions list on the Account page.

### Related Topics

- [How do I undo enrichment of an enriched account?](#)

# Contact Preferences

## Overview of Setting Up Contact Preferences

Salespeople capture and modify preferences about whether accounts and contacts want to be contacted, such as selecting a Do not email or Do not call check box while editing a contact.

As an administrator, you have several setup options for modifying the pages used to capture such information.

### Overview of the Options

You can set up the application to be as simple as including a Do Not Contact check box on a page, or as complex as letting salespeople enter Do Contact and Do Not Contact preferences for multiple contact methods, such as phone, email, and so on. You can also display a Reason field next to the do not and do contact options.

You use a combination of Application Composer and Page Composer to set up contact preference UIs.

### Privilege to Tag a Reason Code as Legal

Contact restriction information is captured as a Reason Code. Salespeople can create and edit contact preference information with any Reason Code that's not identified as Legal. To create and edit contact restriction information using a Reason Code that's tagged as Legal, add the HZ\_LEGAL\_CONTACT\_PREFERENCES\_PRIV privilege to the required role.

You can set up a reason code as legal by tagging the Reason Code lookup value. Tag the lookup type REASON\_CODE with the value LEGAL using the Manage Trading Community Common Lookups task.

## Set Up Contact Preferences

You can set up the Accounts and Contacts profile pages so that salespeople can capture contact preferences, such as do not call preferences.

Use Application Composer to expose the Manage All Phones and Manage All Emails dialog windows. Then use Page Composer to expose the OK to Call, Do Not Call, and (optional) Reason fields.

### Set Up UI Elements to Capture Preferences

Enable Manage All Phones and Manage All Emails dialog windows so that salespeople can set contact preferences for accounts and contacts. You can enable them on the Create Contact and Edit Contact: Profile pages and on the Create Account page (Manage All Phones only) and Edit Account: Profile page.

Set up OK to Contact preference for a specific phone, email, or address of a contact. Identify if a contact has made a choice to be contacted, or has made no choice. The OK to Call and OK to Email options are mutually exclusive with the Do Not check box. Only one can be enabled for a given contact.

Here's a procedure that uses the Contacts pages as an example. Modify it for Accounts by navigating to the Accounts object in Application Composer and editing the Creation Page and Details page layouts.

Here's how to enable all phones and emails.

1. Ensure that you're working in an active sandbox.
2. Click **Navigator** > **Configuration** > **Application Composer**.
3. In the navigation tree, expand **Standard Objects**, **Contact**, and then **Pages**.
4. Ensure that the **Application Pages** tab is active.
5. In the Creation Page Layouts section, in the Create Contact table, duplicate the Standard Layout. Name the new layout and edit it.
6. In the Creation Layout page, click the **Edit** icon that appears next to Create Contact.
7. Select and move fields from the Available Fields column to the Selected Fields column, depending on your requirements.

This table shows the fields:

| Fields         | Description                                                                                                                                                                                                     |
|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Do not contact | Enables the Do not contact check box in the contact Profile page. Lets salespeople set a blanket do not contact preference at the contact level. This signifies that this contact must not be contacted at all. |
| Do not call    | Enables the Do not call check box in the contact Profile page. Lets salespeople set the contact preference at the phone level for a contact.                                                                    |
| Do not email   | Enables the Do not email check box in the contact Profile page. Lets salespeople set the contact preference at the email level for a contact.                                                                   |
| Do not mail    | Enables the Do not mail check box in the contact Profile page. Lets salespeople set the contact preference at the physical mailing address level for a contact.                                                 |
| All phones     | Enables the All phones icon in the Create or Edit Contact page, and enables the Manage All Phones dialog window that appears when users click this icon.                                                        |
| All emails     | Enables the All emails icon in the Create or Edit Contact page, and enables the Manage All Emails dialog window that appears when users click this icon.                                                        |

8. Click **Save and Close**.
9. Click **Done**.

**Note:** If you want the contact preference fields to appear in the Create Contact page, then you must perform steps 1 to 9. If you want the fields to appear in the Edit Contact page, then you must also perform steps 10 to 15.

10. In the Details Page Layouts section, in the Edit Contact table, copy the Standard Layout. Name the new layout and edit it.
11. In the Details Layout page, click the icon that resembles the **Profile** icon.
12. Click the **Edit** icon that appears next to Edit Subtab: Summary.



13. Select and move fields from the Available Fields column to the Selected Fields column, depending on your requirements.
14. Click **Save and Close**.
15. Click **Done**.
16. Publish the sandbox according to your company's business practices.

## Set Up UI Elements to Capture Preferences for Different Phones and Email Addresses

You can enable UI elements that let salespeople capture preferences for contacts and accounts at the phone and email level. You can also enable a Reason field for the preference.

**Note:** You must first enable the **All phones** and **All emails** fields in Application Composer (see the previous procedure). Then you enable the additional UI elements using Page Composer.

This procedure uses the phone contact method as an example. Modify it for the email contact preference UI elements:

1. Ensure you're working in an active sandbox the supports Page Composer.
2. Navigate to **Sales > Contacts**.
3. Activate Page Composer: From the drop-down list under your user name in the global header, select **Edit Pages**.  
When Page Composer is active, the phrase Editing: User Interface displays at the top of the page.
4. In the Contacts landing page, search for and select a contact.
5. Click the name of the contact to open the edit page. In the Edit Contact page, click the **Profile** icon.
6. In the Profile page for the contact, click the edit icon for **All phones**.
7. In the Editing: User Interface dialog window, click the **Select** tab at the top of the page.
8. In the Manage All Phones dialog window, click any one of the columns, such as Primary, Type, or Number columns and select the **Edit Parent Component** option in the dialog box.
9. In the Component Properties dialog window, click the **Children** tab.
10. Select the **Do Not Call** or **OK to Call** options, and, optionally, the **Reason**.
11. Click **Apply** and then **OK**. Notice that the Do Not Call, OK to Call, and Reason columns (if selected) are now visible in the Manage All Phones dialog window.
12. In the Editing: User Interface window, click the **Add Content** tab.
13. In the Manage All Phones dialog window, click OK.
14. Click the edit icon next to the All phones field to verify your changes.
15. Click **Close** to close Page Composer.
16. Publish the sandbox according to your company's business practices.

## Personally Identifiable Information

### Manage Personally Identifiable Information

Any piece of information that can potentially be used to uniquely identify, contact, or locate a single person is called personally identifiable information (PII). Administrators use PII to access information such as social security numbers, addresses, bank account numbers, phone numbers, and so on.

As a sales administrator, you can manage PII information. You can add or update PII data for your contacts. You must expose PII attributes from Application Composer or Page Composer in an active sandbox. For more information about

how to enable the PII attributes, see topic, [Manage Personally Identifiable Information in the Implementing Customer Data Management for CX Sales and Fusion Service guide](#).

#### *Related Topics*

- [How you protect Personally Identifiable Information?](#)

## Data Removal

### Delete Accounts and Contacts

Users with the sales administrator role can delete accounts and contacts.

Sales administrator can give privileges to the other administrative roles to be able to delete accounts and contacts. Here's a description of the privileges you must have:

| Object  | Privilege                  | Additional Information                                                                                                                                                                                                                                                                                  |
|---------|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account | Delete Sales Party         | You can't delete an account if it's a partner or competitor account, or if the account is the topmost tier in the account hierarchy.                                                                                                                                                                    |
| Contact | Delete Sales Party Contact | You can delete standalone contacts. You must also have full access to all of the accounts associated to the contact. When you delete a contact, you remove the entire person record of the contact, including profile data, account usages, household memberships, and relationships to other accounts. |

**Note:** When you delete an account or a contact, all the child entities may not become inactive. Run the Delete Child Entities of Inactive Party Records scheduled process to deactivate them.

### Purge Inactive Data

When you delete a party record which can be a sales account, a sales contact, or sales households in your application, it becomes an inactive record. Inactive records may get accumulated in your application and you may want to purge them.

Purging inactive records helps you free space and comply with data protection regulations.

Note that only inactive records that are available in the sales context can be purged. For example, an inactive Partner record can't be purged because Partner isn't related of Sales.

Only inactive and related merged sales accounts, sales contacts, and sales households which have no dual usage, or any additional usage (more than one usage) can be purged. Examples of inactive contacts, accounts, or households with dual usage are:

- contact which is also a supplier contact
- sales account which also has billing account usage

The following sales contact record types are supported:

- CONTACT
- ORG\_CONTACT
- CUSTOMER\_CONTACT
- SALES\_PROSPECT
- SALES\_ACCOUNT

The following sales account record types are supported:

- SALES\_PROSPECT
- SALES\_ACCOUNT

Also, along with the purge of the inactive accounts, contacts, or households references of these purged records, such as identifier or name, are also removed in other applications like opportunities, leads, campaigns, territories, assets, deals, quotes, activities (tasks and appointments), notes, forecasts, business plans, and contracts. For these flows, purged accounts, contacts, or households don't appear on application pages, web service responses, and BI reports.

Merged records can be purged only when the master (survivor) party becomes inactive.

Purge account, contact, or household records in the following situations:

- Purge Inactive sales accounts, contacts, or households to comply with General Data Protection Regulations (GDPR).
- Cleanup data because incorrect data was created that's no longer needed.
- In some rare cases, cleanup of data maybe required to improve performance of the application.

## How You Enable Purging of Inactive Records

You use the two profile options to help you enable and manage purging of inactive records:

- **ORA\_HZ\_ENABLE\_PURGE:** This profile option enables purging of inactive records. By default, this profile option is enabled and is set to No.
- **ORA\_HZ\_PURGE\_MIN\_AGE:** This profile option specifies the number of days after which inactive records can be purged. By default, the value of this profile option is 30 days.

You can enable these profile options by clicking the Setup and Maintenance area and going to the following:

- Offering: Sales
- Functional Area: Sales Foundation
- Task: Manage Administrator Profile Values

You must specify filter criteria to select the inactive records that you want to purge. The value of the profile **ORA\_HZ\_PURGE\_MIN\_AGE** is displayed as the Minimum Age on the Manage Party Purge Activities page and

the default value of the Age By field on the Create Purge Filter page. Modify the value of the profile option ORA\_HZ\_PURGE\_MIN\_AGE to change the default value of the Age By field.

## Create and Edit Filters and Purge

You must create a filter criterion to purge records. The records that are to be purged are selected based upon the filter criteria. So, you can't skip creating filters and proceed to purging records. You can either immediately purge the selected records or schedule the Purge Inactive Party Records scheduled process to purge inactive records later. You must create a filter criterion to purge records.

1. In the Setup and Maintenance work area, go to the following:

- Offering: Sales
- Functional Area: Sales Foundation
- Task: Manage Party Purge Activities

**Note:** The Purge Enabled field on Manage Party Purge Activities page indicates whether inactive records can be purged, and the Minimum Age field indicates the minimum number of days after which inactive records can be purged. Use the profile options discussed earlier in the topic to change these profile option values, if needed.

2. Click **Actions > Create** to create a purge filter.

You can click **Actions > Edit** to edit the existing filter criteria or click **Actions > Remove** to remove an existing filter.

3. Specify the purge filter criteria or change the existing filter criteria as required.

**Note:** You can't specify a number less than the number specified in the Age By field. If you want to reduce this Age By value, change the value of the profile option ORA\_HZ\_PURGE\_MIN\_AGE to a smaller number.

**Note:** To purge records on the same day that they were deleted, specify Age By in the filter criteria and the value of the profile option ORA\_HZ\_PURGE\_MIN\_AGE as -1.

4. Select the **Enabled** option to make the filter criterion available for filtering and purging records. If you don't select this option and continue to save the filter, the filter criteria is saved but isn't available to filter and purge records.
5. Click **Save and Close**.

The Final Result section displays the first 500 records that match your filter criteria.

6. Click **Purge** to immediately purge all the records that currently match your filter criteria.

Else, click **Save and Close** to save the filter criteria and purge the records in the next cycle of running the Purge Inactive Party Records scheduled process.

**Note:** If you want to automatically purge records in the next cycle of running the scheduled process, the purged records may not be the same records that appeared in the preview section of the Manage Party Purge Activities page. The records purged are the ones that match the filter criteria when the scheduled process is run.

*Related Topics*

- [Why can't I find inactive records for purging them?](#)

## Additional Configurations

### Make the Account Field Required for Contacts

You may want to make the Account field required when salespeople create a contact, so that you can be sure an account always gets associated with a contact. By default, the Account field isn't required when creating a contact.

Use Application Composer to set the field as required:

1. Ensure you're working in an active sandbox.
2. Navigate to **Configuration > Application Composer**.
3. In the navigation tree, expand Standard Objects, and then expand Contact.
4. Click the **Pages** node.
5. Ensure that the Application Pages tab is selected.
6. In the Create Contact layouts region, duplicate the standard layout and edit the resulting layout.
7. In the Creation Layout page, click the **Account** link.
8. In the Edit UI Properties: Account dialog box, Layout Properties section, set the Required field to **Yes**.
9. Click **Save and Close**.
10. Click **Done** on the Creation Layout page.
11. Publish the sandbox according to your company's business practices.

### How do I set up the required address option for accounts and contacts?

Administrators can set an address as required or optional depending on the type of account or contact. You can specify that an address is required and determine how the address appears on the UI.

### Manage Profile Values

Use the Manage Administrator Profile Values task to specify that an address is required while creating an account. Profile options let you enable or disable address options for accounts and contacts. Use these profile options to specify that an address is required while creating an account.

| Profile Option Code                  | Profile User Name        | Description                                                       |
|--------------------------------------|--------------------------|-------------------------------------------------------------------|
| ZCA_ACCOUNT_ADDRESS_REQUIRED_ENABLED | Account Address Required | Specify whether an address is required while creating an account. |
| ZCA_CONTACT_ADDRESS_REQUIRED_ENABLED | Contact Address Required | Specify whether an address is required while creating a contact.  |

| Profile Option Code | Profile User Name | Description |
|---------------------|-------------------|-------------|
|                     |                   |             |

This table lists the profile values and which types of accounts require the address to be entered. By default, the profile option setting is **Required for customer**.

| Profile Value         | Description                                                                         | Required for Account Type                                |
|-----------------------|-------------------------------------------------------------------------------------|----------------------------------------------------------|
| Yes                   | The address is required.                                                            | All types of accounts.                                   |
| No                    | The address isn't required.                                                         | The address is optional, regardless of the account type. |
| Required for customer | The address is required only for the account type that's set to this profile value. | The address is required only for customers.              |

To make the address required while creating an account:

1. In the Setup and Maintenance area, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. Click the **Manage Administrator Profile Values** link.  
The Manage Administrator Profile Values page appears.
3. Enter the code in the Code field, and click **Search**.  
The application displays the profile option information.
4. In the Profile Values section, select **Yes** in the Profile Value field.
5. Click **Save and Close**.

## Manage Address Formats

Use the Manage Address Format task to set up address attributes. The address format lets you manage the appearance of the address for accounts and contacts. For example, you can change the case of letters in an address, or mark a specific address attribute as required.

To specify which fields in an address are required:

1. In the Setup and Maintenance area, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Address Formats
2. Click the **Manage Address Formats** link.  
The Manage Address Formats page appears.
3. Select a country from the drop-down list.

4. In the Format Variation Layout area, select the fields that you want to set as required in the **Required** column.
5. Click **Done**.

## Groovy Support for Numbering Management

You can automatically generate the site ID of an address while creating a contact or an account using a groovy script. Before you can use the groovy script, you must verify that the value for HZ\_GENERATE\_PARTY\_SITE\_NUMBER profile option is set to Auto numbering, update allowed (AUTONUM\_UPDATE).

## Add the Time Zone Field to Contacts Pages

You can add the Time Zone field to the Contacts create and edit pages, so that salespeople can specify the customer contact's time zone.

1. Sign in as a user with the Sales Administrator job role.
2. Ensure you're working in an active sandbox.
3. Navigate to **Configuration > Application Composer**.
4. Navigate to the **Contact** object and click **Pages**.
5. Duplicate the page where you want the time zone field to appear. For example, duplicate the Create Contact page standard layout and edit the copy.
6. In the Creation Layout page, Configure Detail Form fields region, move **Time Zone** from the Available Fields to the Selected Fields window.
7. Save your work.
8. Navigate to the Create Contact page in **Sales > Contacts**. Verify that the Time Zone field appears in the Create Contact page.
9. Publish the sandbox according to your company's business practices.

### Related Topics

- [Specify Customer Time Zones](#)

## Enable the Photo Field for a Contact

You can enable users to upload and show photos on a contact's profile.

Here's how to display the Photo field on the contacts pages:

1. Ensure you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.
3. In the Objects navigation tree, expand **Standard Objects** and then expand **Contact**.
4. Click the **Pages** node.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the duplicate icon.
7. Enter a new layout name and click **Save and Edit**.

The Details Layout page appears.

8. Click **Subtab Profile** for the field to display on the Profile page.
9. In the Subtabs Region, click the **Edit Summary Subtab** icon.  
The Configure Detail Form page appears.
10. Move **Photo** from the Available Fields window to the Selected Fields window.
11. Click **Save and Close**.
12. From the Details Layout page, click **Done**.
13. Make sure that the layout status for your layout is set to Active, and that it's associated to your application user role.
14. Test the changes as follows:
  - o Navigate to **Sales > Contacts > select a contact > Edit Contact page > Profile subtab > Photo field > upload photo**.
  - o On the Contacts landing page, in the card view, you can see the photo for the contact you selected.
15. Publish the sandbox according to your company's business practices

## Manage Contact Views

Set the list view as the default view for the Contacts landing page. By default, the contact view is set to card view. Salespeople can use either the card view or list view.

**CAUTION:** If you use both card view and list view, then a blank list of contacts appears.

To enable the list view:

1. Ensure you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.
3. In the navigation tree, expand **Standard Objects**, and then expand the **Contact** object.
4. Within the object you're modifying, click the **Pages** node.
5. Ensure that the **Application Pages** tab is selected.
6. The Landing Page Layouts region, duplicate the standard landing page layout.
7. Edit the new layout. In edit mode of the Landing Page Layout page, click the edit icon on the Default Contact View.
8. Select **List View** in the Select Default View dialog box.
9. Click **OK**.
10. Click **Done** on the Landing Page Layout page.
11. Publish the sandbox according to your company's business practices.

## Can I modify the phone types for accounts and contacts?

Phone types for accounts and contacts are stored in the lookup type, ORA\_HZ\_PHONE\_TYPE. While you can't disable the existing ones, you can rename them.

Here's how:

1. In Setup and Maintenance, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation



- Show: All Tasks
  - Task: Manage Standard Lookups
2. On the Manage Standard Lookups page, search for the lookup type code, **ORA\_HZ\_PHONE\_TYPE**.
  3. Here are the available values for sales:
    - Mobile
    - Work
    - Home
    - Fax
    - Land
  4. Edit the meanings as needed.
  5. Click **Save and Close**.

## Configure Event Tracking

You can track changes to your accounts, contacts, or household data by configuring the following profile options:

- **HZ\_INVOKE\_OBJ\_WF\_ON\_TRACKING**: Enable this profile option to indicate that there are changes to parent records. That is, whenever a child is updated, the parent record is marked as updated. For example, if the email address or phone number of a contact was updated, the contact is marked as updated which in turn indicates that the contact requires synchronization.
- **HZ\_ENABLE\_EVENT\_TRACKING**: Use this profile option to enable event tracking of records. This profile option facilitates tracking of changes to records and raises an event whenever there is a change.

**Note:** If you don't plan to integrate your application with data quality, extensibility, object workflow, or Oracle Eloqua, you can turn off the **HZ\_INVOKE\_OBJ\_WF\_ON\_TRACKING** profile option. This helps to avoid locking issues. But you must carefully review the implications of turning off this profile option in your application.

You can enable these profile options by clicking the Setup and Maintenance area and going to the following:

- Offering: Sales
- Functional Area: Sales Foundation
- Task: Manage Administrator Profile Values

## How to Display the Contracts Tab on the Accounts Details Page

You can enable the Contracts tab within the Accounts pages using Application Composer. From the Contracts tab, salespeople can view and download contracts associated with accounts.

## Groovy Support for Team Member Notifications

You can add or delete team members for accounts, contacts, and households using the respective UI pages or REST APIs. When you add or delete team members, notifications are prompted for the parent record.

These notifications enable you to define Groovy prompts on the parent object.

For more information on Groovy scripting, see *Oracle Applications Cloud Groovy Scripting Reference* guide. For more information about REST APIs, see the *REST API for CX Sales and Fusion Service* guide.

## Groovy Support for Email Address Format Validation

You can add email addresses for accounts or contacts using the respective UI pages or REST APIs. While entering these email addresses, the format of the email address should be validated.

You can use Groovy scripts to specify the rules to validate email address formats.

For more information on Groovy scripting, see *Oracle Applications Cloud Groovy Scripting Reference* guide. For more information about REST APIs, see the *REST API for CX Sales and Fusion Service* guide.

The following code is a sample for validating email addresses:

```
def regex = /(?!^([\w-]+(?:\.[\w-]+)*)@((?:(\w[\w-]{0,66})\.[a-z]{2,6}(?:\.[a-z]{2})?)$)/
def email = getAttribute('ListEmailAddress');
def EmailCollection = Email ;
EmailCollection.reset();

if (email == null)
{
while(EmailCollection.hasNext()){
def emailRec = EmailCollection.next()
email = emailRec.EmailAddress
if (!(email =~ regex)){
throw new oracle.jbo.ValidationException("Populate email in the appropriate format (example
someone@oracle.com) ")
}
}
}
else
if (!(email =~ regex)){
throw new oracle.jbo.ValidationException("Populate email in the appropriate format (example
someone@oracle.com) ")
}
```

## Foundation Profile Options

Foundation profile options configure various features such as geographies, Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B), address formats, and so on.

The following table lists foundation profile options, descriptions, default values, and the impact these profile options have on different parts of the application.

To view the details of these profile options:

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for **Manage Administrator Profile Values** task and open it.
3. Search using the profile option code.

To change the default values of these profile options:

1. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
2. Click the Tasks menu and click **Search**. Search for **Manage Administrator Profile Values** task and open it.
3. Search using the profile option code.
4. Change the profile value.

| Profile Option Code                     | Profile Option Name                   | Default Value                  | Description                                                                                                                                                                                                                                              | Impact                                                                                                    | Related Topics                                                                                                   |
|-----------------------------------------|---------------------------------------|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| HZ_UPDATE_STD_ADDRESS                   | Update Standardized Addresses Enabled | No                             | Enable to allow the update addresses that are already standardized using postal information.                                                                                                                                                             | This profile option is applicable to Application UI and REST                                              |                                                                                                                  |
| HZ_POST_IMPORT_GNR_INVOKE               | Address Validation After Import       | Y                              | Runs the Geography Name Referencing (GNR) process after geography data import. The recommended value for this profile option value is N. This helps improve the import performance. After setting this to N, GNR process isn't invoked for every import. | This profile option is applicable to File-based Import (used in high volume import) and Import Management | See <i>How do I validate geographies of addresses against master geographies and generate naming references?</i> |
| HZ_ORGANIZATION_PROFILE_INDEX_THRESHOLD | Organization Profile Index Threshold  | 10                             | Specify the number of profile history records above which organization profile history information will be automatically denormalized into a secondary table for improved performance.                                                                   | This profile option is applicable to REST                                                                 |                                                                                                                  |
| HZ_INVOKE_OBJ_WF_ON_TRACKING            | Child Entity Rollup Enabled           | Yes                            | Enable this profile option to indicate that there are changes to parent records. That is, whenever a child is updated, the parent record is marked as updated.                                                                                           | This profile option is applicable to Scheduled Process, Application UI, REST                              | See <i>Configure Event Tracking</i>                                                                              |
| HZ_GENERATE_PARTY_NUMBER                | Party Number Generation               | Auto numbering, update allowed | Specify if the party numbers, such as Billing Account Number, must                                                                                                                                                                                       | This profile option is applicable to Application UI, REST                                                 | See <i>Set Up the Third-Party Involuntary Payment Interface</i>                                                  |

| Profile Option Code              | Profile Option Name                                | Default Value                      | Description                                                                                                                                                                                              | Impact                                                                                                  | Related Topics                                                                                                      |
|----------------------------------|----------------------------------------------------|------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------|
|                                  |                                                    |                                    | be automatically generated. You can also specify if the party number can be later updated.                                                                                                               |                                                                                                         |                                                                                                                     |
| HZ_ENABLE_EVENT_TRACKING         | Composite Event Tracking Enabled                   | Yes                                | Enable composite event tracking for customer and contact entities. This tracks changes to the entities, and raises an event whenever there is a change to the entities.                                  | This profile option is applicable to Scheduled Process, Application UI, and REST                        | See <a href="#">Configure Event Tracking</a>                                                                        |
| HZ_AUTO_SITE_NUMBERING           | Site Use Identifier Generation                     | Auto numbering, update not allowed | Select how the site use identifier will be generated, and if you can update it when creating or editing an account site use.                                                                             | This profile option is applicable to Application UI and REST                                            |                                                                                                                     |
| HZ_AUTO_LOG_INTERACTIONS         | Call Interaction Logging Enabled                   | No                                 | Enable adding phone calls to the interactions log when the call action is used.                                                                                                                          | This profile option is applicable to Application UI and REST                                            |                                                                                                                     |
| ORA_HZ_RES_ENABLE_MGR_END_UNCOND | Enable End Dating Resource Manager Unconditionally | N                                  | Allows organization membership end date for resource with managerial role without any validation. You need not move out all reports before moving manager out. Set the value to Y to enable this option. | This profile option is applicable to Application UI, REST, and Import Management (only Resource object) | See, <a href="#">How do I manage resource organization hierarchy changes?</a>                                       |
| ORA_HZ_PURGE_MIN_AGE             | Minimum Threshold Value for Purge of Inactive Data | 30                                 | Specify the minimum number of days after which inactive records are to be purged.                                                                                                                        | This profile option is applicable to Application UI                                                     | See, <a href="#">Purge Inactive Data</a><br><br><a href="#">Why can't I find inactive records for purging them?</a> |
| ORA_HZ_INCLUDE_REGIONAL_COUNTRY  | Regional Country in Address Formats Included       | No                                 | Enable address format functions to include regional country. You must set the value to yes to include regional country.                                                                                  | This profile option is applicable to Application UI                                                     | See, <a href="#">How to have different contact address fields depending on the country selected?</a>                |
| ORA_HZ_GEO_HIERARCHY_LIMIT       |                                                    | 100000                             | Specify the maximum number of nodes that each parent node                                                                                                                                                | This profile option is applicable to Application UI and                                                 | See, <a href="#">What are the best practices for</a>                                                                |

| Profile Option Code                | Profile Option Name                              | Default Value | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Impact                                                                                        | Related Topics                                                                                                         |
|------------------------------------|--------------------------------------------------|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
|                                    |                                                  |               | can handle for any geography element.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Import Management (only for geography object)                                                 | <i>managing Geography mismatches?</i><br><br><i>How do I manage Geography Structures, Hierarchies, and Validation?</i> |
| ORA_HZ_ENABLE_PURGE                | Purging of Inactive Data Enabled                 | N             | Enables the purging of data that are in inactive state using the Manage Party Purge Activities task. You must specify filter criteria to purge inactive data using Manage Party Purge Activities task.                                                                                                                                                                                                                                                                                                                                                                                                              | This profile option is applicable to Application UI                                           | See, <i>Purge Inactive Data Why can't I find inactive records for purging them?</i>                                    |
| ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER | Enable Current Active Worker Sync For MPLCRI Job | No            | <p>Enable current active worker sync for Maintain Party and Location Current Record Information batch job. If set to N, then current active workers won't get synced to person party.</p> <p>This profile option is associated with the Maintain Party and Location Current Record scheduled process. This profile option ORA_HZ_ENABLE_MPLCRI_ACTIVE_WORKER must be set to Y and the HRC_DISABLE_HCM_EVENTS_PROCESSING profile option must be set to Yes to sync active workers. For more information topic, see, <i>Why should I use the Maintain Party and Location Current Record Information process?</i>.</p> | This profile option is applicable to Scheduled Process                                        | see, <i>Why should I use the Maintain Party and Location Current Record Information process?</i>                       |
| ORA_HZ_ENABLE_DAAS_LOQATE          | DaaS GBG   Loqate Data Import Enabled            | Yes           | Enable the import of DaaS GBG   Loqate geography information.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | This profile option is applicable to Scheduled Process, Application UI, and Import Management | see, <i>How to Import Nokia Geography Data</i>                                                                         |

| Profile Option Code             | Profile Option Name                                     | Default Value                                                  | Description                                                                                                                                                              | Impact                                                                                                                                 | Related Topics                                                                             |
|---------------------------------|---------------------------------------------------------|----------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| ORA_HZ_DAAS_GEO_ENDPOINT        | DaaS Geography Server Endpoint Information              | <code>https://geo.daas.us-phoenix-1.ocs.oraclecloud.com</code> | Specify the endpoint information, such as the host name and the port number, of the DaaS geography server.                                                               | This profile option is applicable to Application UI and REST                                                                           |                                                                                            |
| HZ_TIMEZONE_POPULATION_ENABLED  | Time Zone Population Enabled                            | No                                                             | Enable update of contact records with time zone details from the Populate Location Latitude and Longitude Information scheduled process.                                 | This profile option is applicable to Scheduled Process                                                                                 |                                                                                            |
| HZ_SHARE_LOCATIONS              | Location Sharing Mode                                   | Share among all parties                                        | Select if location can be shared among different persons and organizations.                                                                                              | This profile option is applicable to File-based Import. This profile option isn't applicable in Import Management.                     |                                                                                            |
| HZ_RS_DEF_START_DATE            | Resource Start Date Default                             | Current date                                                   | Select if the default start date will be the date when the resource is created, or the employment start date of the resource.                                            | This profile option is applicable to Application UI. This profile option isn't applicable in Import Management and resource user REST. |                                                                                            |
| HZ_RESOURCE_ALLOW_CUSTOMIZATION | Application Composer for Resource Desktop Pages Enabled | No                                                             | Enable access to Oracle CX Sales Resource desktop pages in the Application Composer.                                                                                     | This profile option is applicable to Application UI                                                                                    | See <a href="#">How do I enable desktop pages for Resource Directory?</a>                  |
| HZ_LANG_FOR_COUNTRY_DISPLAY     | Language for Country Display                            |                                                                | Specify the default language used to translate the country name for international addresses. This is typically the language of the country where an item is mailed from. | This profile option is applicable to Application UI and REST                                                                           |                                                                                            |
| HZ_GEOCODING_BATCH_SIZE         | Geocoding Subprocess Batch Size                         | 1000                                                           | Specify the maximum number of locations that each batch subprocess can handle for geocoding.                                                                             | This profile option is applicable to Scheduled Process                                                                                 |                                                                                            |
| HZ_GENERATE_PARTY_SITE_NUMBER   | Party Site Number Generation                            | Auto numbering, update not allowed                             | Select how a party site number will be generated, and if you can update the site number when creating                                                                    | This profile option is applicable to Application UI, and REST                                                                          | See <a href="#">How do I set up the required address option for accounts and contacts?</a> |

| Profile Option Code         | Profile Option Name                | Default Value                      | Description                                                                                                                           | Impact                                                                           | Related Topics                                                                      |
|-----------------------------|------------------------------------|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|-------------------------------------------------------------------------------------|
|                             |                                    |                                    | or editing a party site address.                                                                                                      |                                                                                  |                                                                                     |
| HZ_GENERATE_CUSTOMER_NUMBER | Customer Account Number Generation | Auto numbering, update not allowed | Select how a customer account number will be generated, and if you can update the number when creating or editing a customer account. | This profile option is applicable to Application UI, and REST                    |                                                                                     |
| HZ_GENERATE_CONTACT_NUMBER  | Contact Number Generation          | Auto numbering, update not allowed | Select how the contact number will be generated, and if you can update the number when creating or editing a contact.                 | This profile option is applicable to Application UI, and REST                    |                                                                                     |
| HZ_ENABLE_VO_SECURITY       | Enable VO-Based Security           | No                                 | Enable VO-based security and override the default EO based security for all objects that use the secured PartyEO.                     | This profile option is applicable to Application UI and REST                     |                                                                                     |
| HZ_ENABLE_MULTIPLE_BU_CRM   | Multiple Business Units Enabled    | Yes                                | Enable the multiple business units feature for Oracle Fusion Customer Relationship Management.                                        | This profile option is applicable to Application UI                              | See <i>Set Sales Business Unit Profile Options</i> and <i>Define Business Units</i> |
| HZ_ENABLE_ENTITY_EVENTS     | Entity Level Events Enabled        | Yes                                | Enable entity level events for account, contact, and household entities.                                                              | This profile option is applicable to Scheduled Process, Application UI, and REST |                                                                                     |
| HZ_ENABLE_CLICK_TO_DIAL     | Click to Dial Enabled              | Yes                                | Enable automated dialing by clicking on a phone number.                                                                               | This profile option is applicable to Application UI                              |                                                                                     |
| HZ_ENABLE_BUSI_VALID        | Business Key Validation Enabled    | No                                 | Enable the business key validation rule to check for duplicate contact points, such as mobile, URL, and Email.                        | This profile option is applicable to REST                                        |                                                                                     |
| HZ_DEFAULT_NAME_STYLE       | Name Style Default                 | Concatenated Name                  | Specify a default style for name formatting.                                                                                          | This profile option is applicable to Scheduled Process, Application UI, and REST |                                                                                     |

| Profile Option Code           | Profile Option Name                                                     | Default Value     | Description                                                                                                                               | Impact                                                                                                            | Related Topics                                                                                                   |
|-------------------------------|-------------------------------------------------------------------------|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------|
| HZ_DEFAULT_BU_CRM             | Customer Relationship Management Business Unit Default                  | Vision Operations | Specify the default business unit for Oracle Fusion Customer Relationship Management.                                                     | This profile option is applicable to REST                                                                         | See <a href="#">Set Sales Business Unit Profile Options</a><br><a href="#">Define Business Units</a>             |
| HZ_DEFAULT_ADDR_STYLE         | Address Style Default                                                   | Postal Address    | Specify a default style for address formatting.                                                                                           | This profile option is applicable to Application UI and REST                                                      |                                                                                                                  |
| HZ_AUTOMATE_RESOURCE_CREATION | Automated Resource Creation Enabled                                     | No                | Enable automatic creation of resource from employee creation process without user intervention.                                           | This profile option is applicable to Application UI                                                               | See <a href="#">Overview of HCM Job-to-Role Mapping</a>                                                          |
| HZ_ALLOW_MULTIPLE_SELLTO      | Multiple Sell-to Addresses Enabled                                      | No                | Enable multiple sell-to address creation for a party, using the Data Import program. This profile option should not be used by customers. | This profile option is applicable to Application UI, and REST                                                     |                                                                                                                  |
| HZ_ADDRESS_DISABLE_ALT_NAMES  | Hide Alternate Address Names                                            | No                | Hide alternate names in the Address list of values. This option, when enabled, displays only the primary geography names for the address. | This profile option is applicable to Application UI                                                               |                                                                                                                  |
| HZ_GNR_NUM_OF_WORKERS         | Number of workers for a given Geography Name Referencing request        | 1                 | Determines the number of sub-processes for Validate Geographies of Addresses Against Master Geographies scheduled process.                | This profile option is applicable to Scheduled Process                                                            | See <a href="#">Best Practices for Geography Validation</a>                                                      |
| ZCA_SA_AUTO_ASSIGN_ON_UPDATE  | Sales Account Automatic Assignment on Update Enabled                    | No                | Enable automatic territory based assignment processing after a sales account is updated.                                                  | This profile option is applicable to Scheduled Process, Application UI, and REST                                  | See <a href="#">How You Enable Automatic Account Assignment Enable Automatic Assignment of Imported Accounts</a> |
| HZ_GNR_COMMIT_SIZE            | Batch Size for committing records in Geography Name Referencing process | N/A               | The Batch Size for committing records in Geography Name Referencing process                                                               | This profile option is applicable to Application UI, Scheduled Process, File-based Import, and Import Management. |                                                                                                                  |



| Profile Option Code              | Profile Option Name                                  | Default Value | Description                                                                                                                                                              | Impact                                                 | Related Topics                                                                                             |
|----------------------------------|------------------------------------------------------|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| ORA_HZ_IMPORT_MULTI_ADDRESS_TYPE | Import Processing for Multiple Address Types Enabled | Yes           | Enable the processing of multiple address types for Account, Contact, Address, Organization, and Person objects.                                                         | This profile option is applicable to Import Management | See <a href="#">Import Your Household Data How do I import account data? How do I import contact data?</a> |
| ORA_HZ_RES_ENABLE_SKILLS         | Skills Section in Resource Detail Page Enabled       | No            | Enable the skills section in the Resource Detail page of the Resource Directory and Manage Resources task. The valid values are YES and NO, and the default value is NO. | This profile option is applicable to Application UI    | See <a href="#">How to Enable the Skill and Qualification Tabs on Resource Pages</a>                       |

## Integration with Third Parties

### Overview of Third-Party Integrations for Accounts

You can use the Account, Contact, and Household interfaces to gain a comprehensive view of your customer information. This functionality utilizes sales data, as well as relevant third-party content.

#### Third-Party Integrations for Sales Customers

OneSource and Siebel CRM are two third-party integrations that you can configure in sales applications. This topic explains how you map third-party customer data to sales customers.

#### Map OneSource Data Sales Application

You access OneSource data directly from the OneSource node on Sales Account, Contact, and Household information trees.

The sales application searches for OneSource company data in the following order:

1. Search based on the mappings defined in the `HZ_ORIG_SYS_REFERENCES` table, where `orig_system` is `ONESOURCE`.
2. Search based on the sales customer stock symbol, checked if no mapping is found in `HZ_ORG_SYS_REFERENCES`.
3. Search based on the sales customer name, checked if no mapping is found by the stock symbol lookup. If multiple OneSource companies match the sales customer name, you can choose from the list of matching OneSource companies.

#### Mapping Siebel CRM Service Data to Sales Application

You access mappings for Siebel CRM accounts, contacts, and groups to sales customers in the `HZ_ORIG_SYS_REFERENCES` table, where `orig_system` is `SIEBEL`.

**Note:** The sales application doesn't include licenses for OneSource and Siebel CRM. You must acquire third-party application licenses separately. If you want to enable OneSource and you have a web proxy for external HTTP(S) traffic, you must select Enable Web Proxy on the Web Proxy Configuration screen and specify your web proxy configuration.

## FAQs for Accounts and Contacts

### Frequently Asked Questions (FAQs) for Accounts and Contacts

This section contains some frequently asked questions (FAQs) when setting up and maintaining accounts and contacts. Scroll or search to find answers to common questions.

#### How can I set Customer as the default account type?

You can set the default account type to Customer on the create account page by changing a profile option.

To change the profile option:

1. In the Setup and Maintenance area, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. Enter **ZCA\_ENABLE\_SELLTO\_ADDR\_CHECKBOX** in the **Profile Option Code** field.
3. Click **Search**.
4. In the Profile Option: Profile Values region, set the **Profile Value** to Yes.

You have now set the default value of the account type to Customer.

**Tip:** To hide the **Type** field, use Application Composer. For more information about how to hide or show fields in application pages, see the Configuring Applications Using Application Composer guide.

#### Related Topics

- [Extend Application Pages for Activities](#)

#### How can I prevent the validation script of the contact object from impacting other objects such as resources and suppliers?

You must write your application code in such a way that the validation script of the contact object doesn't impact other object flows such as resources or suppliers.

Here's a sample Groovy code:

```
if (InternalFlag == 'N')
{
<your application code>
}
```

## What happens when I delete an account?

When you delete an account, the entire record is removed from the sales application and can't be restored.

In general, when you delete an account:

- The account party status becomes inactive in the database.
- The deleted account doesn't appear in the accounts list, account search, account list of values, account data quality match, segmentation, and recent items.
- The deleted account's profile and children, such as attachments and notes, can no longer be viewed.
- The account's contact relationships, if any, are deleted. The contact can still be viewed, but deleted contact relationships aren't shown in the contact.
- Deleting an account doesn't delete account-related objects, such as opportunities, leads and tasks. You can still view related objects and the account name on these objects, but you can no longer access the deleted account's details.

### *Related Topics*

## What happens when I delete a contact?

When you delete a contact, the record is removed and can't be restored.

In general, when you delete a contact:

- The person record of the contact is removed , including all profile data, customer usages, and group memberships.
- Relationships with associated customers or sales accounts are deleted.
- Contact points or other child objects specific to the customer-contact relationship aren't shown.
- A deleted contact isn't shown or available in any other contact or customer lists. A deleted contact isn't visible to all contact types (standalone, single, or multiple) including a customer-contact, a consumer or prospect, or in cases where the contact is both a customer contact and a consumer or prospect.
- Even if you have the functional privilege to delete a contact, you can't delete contacts unless you have full or edit access to at least one of the accounts associated with the contact.

## Related Topics

# How can I remove the standard buttons on the Account Activities page in Sales?

To customize the Account Activities page in the classic Sales UI, use Application Composer. For example, you can remove standard buttons, such as the Create Appointment, Create Task, and Log a Call buttons. Here's how.

## Customize the Account Activities Page

Create and enter a sandbox with the Application Composer tool enabled.

1. In the Navigator, click **Configuration > Sandboxes**.
2. Click **Create Sandbox**.
3. Enter a sandbox name.
4. Select **Active** for **Application Composer**.
5. Click **Create and Enter**.
6. From the sandbox **Tools** menu, select **Application Composer** to enter the tool.

## Make a Copy of the Standard Layout

While in Application Composer, make a copy of the standard layout:

1. Open the **Standard Objects** node on the left panel.  
Open the **Activity** node.
2. Click **Pages**
3. On the Activity Pages tab, scroll down to the **Embedded Activity Summary Layout** section.
4. Select **Standard Layout** for Embedded Task List Overview and click **Duplicate**.
5. In the Duplicate Layout window, enter a new name for your layout or just click **Save and Edit**.
6. Drill down into your layout.
7. Next to Embedded Task List Overview Table, click **Edit** (the pencil icon).
8. Scroll down until you see the **Configure Detail Form: Buttons and Actions**.
9. You can remove the Create Appointment, Create Task, and Log a Call buttons by moving them from the Selected Buttons to the Available Buttons list.
10. Click **Save and Close**.
11. Click **Done**.

## Publish Your Sandbox

1. Click **Navigator > Configuration > Sandboxes**.
2. On the Sandboxes page, click the name of the sandbox.
3. Click **Publish**.
4. Click **Continue** to publish.
5. When the sandbox completes publishing, click **Done**.

# 16 Activities

## Overview of Activities

Salespeople use the Activities pages to schedule appointments, create tasks and call reports, and view scheduled activities on their calendars.

Key features include:

- **Calendars:** My Calendar provides a full set of calendar functionality. You can change colors to make calendars more friendly-looking. Associate assets with activities so that salespeople can view the asset calendar and manage their appointments.
- **Notifications:** After you set up notifications, salespeople receive them in the notifications list and can drill-down into activities.
- **Call reports:** Call reports help salespeople track key updates to their sales activities.
- **Delegation:** After you set profile options, salespeople can delegate activities to another user.
- **Default record sets:** You can configure the default sets of records for salespeople to access tasks and appointments in the Activities tab from other objects such as opportunity and leads.

See the related topics in this chapter for more setup information. See the *Using Sales* guide for salesperson tasks.

## Activity Search and Views

### Enable the Search of All Activities

Let salespeople search all activities by setting the profile option, All Records I Can See Enabled, to Yes. By default, the value is No, meaning salespeople can only search activities they own or are associated with as a resource.

Setting the profile option to Yes enables the search for all activities, but only in Advanced Search. You can set the profile option either for the whole site or for individual users.

Here's how to set the profile option.

1. In the Setup and Maintenance area, go to:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Activity Profile Options
2. Click the **ZMM\_ACTIVITY\_ENABLE\_ALL\_RECORDS** link.
3. To enable access at the site level, select **Yes** in the Profile Value field.
4. To enable access for specific users:
  - a. Click the **Add** icon.
  - b. In the Profile Level field, select **User**.

- c. In the User Name field, search for and select the user name.
  - d. Select **Yes** in the Profile Value field.
5. Click **Save and Close**.

## Configure Default Activity Search

Salespeople access tasks and appointments in the Activities tab from other objects such as opportunity and leads. A search Show filter determines the default list of activities that display when a user lands on a page.

You can configure the default set of records by modifying a lookup type. The available values for Activity search types are Open Activities, Completed Activities, and All Activities. To change the default search:

1. Navigate to the **Manage Standard Lookups** task in Setup and Maintenance.
2. Search for the ORA\_ZMM\_ACTIVITY\_FILTER\_TYPE lookup type.
3. Set the order of the default values to the order in which you want them to appear in the Show filter.

The application displays the first one by default, followed by the second one, and then the third one.

**Note:** You can't add, delete, or change the end date of values provided in the list.

## Activity Notifications and Delegation

### Set Up Activity Notifications

You can configure company-level and user-level notifications for activities. You also can set the default appointment reminder, and the default appointment duration, calendar view, and calendar start time.

#### Company-Level Notifications

For the entire company, you can specify whether users:

- Receive notifications as owners of an activity
- Receive notifications if they aren't the owners of an activity
- Receive task notifications if changes are made to completed tasks

For both appointments and tasks, you can specify:

- Whether users receive email notifications
- Whether users receive notification messages in the notifications list

**Note:** If you enable email notifications at the company level, each individual user can still choose not to receive email notifications. If you enable notifications in the notifications list, each individual user can still choose not to receive notifications in the notification list.

Here are the profile options for setting up company-level activity notifications:

| Profile Option Name                                                 | Default Value | Description                                                                                       |
|---------------------------------------------------------------------|---------------|---------------------------------------------------------------------------------------------------|
| Task Notification to Contacts and Consumer Customers Enabled        | N             | Enables notifications to external participants when tasks are created, updated, or deleted        |
| Appointment Notification to Contacts and Consumer Customers Enabled | Y             | Enables notifications to external participants when appointments are created, updated, or deleted |
| Disable Appointment E-Mail Notification                             | N             | Specifies whether to disable appointment email notifications                                      |
| Disable Task E-Mail Notification                                    | N             | Specifies whether to disable task email notifications                                             |
| Disable Task Notification List                                      | N             | Specifies whether to disable task notifications in the notifications list                         |
| Disable Appointment Notification List                               | N             | Specifies whether to disable appointment notifications in the notifications list                  |

## User-Level Notifications

You can set several profile options at the user level to control the behavior of notifications. The user preferences setting are stored in the profile options. Users can modify their notification preferences using the preferences pages, located under their user names in the global area.

Here are the user-level profile options for activity notification preferences:

| User Name                              | Default Value | Description                                                                                           |
|----------------------------------------|---------------|-------------------------------------------------------------------------------------------------------|
| Appointment Owner Notifications        | N             | Enables receiving appointment notifications when the user is the owner of the appointment             |
| Appointment Resource Notifications     | Y             | Enables receiving appointment notifications when the user is a resource or invitee of the appointment |
| Task Owner Notifications               | N             | Enables receiving task notifications when the user is the owner of the task                           |
| Task Resource Notifications            | Y             | Enables receiving task notifications when the user is a resource on the task                          |
| Task Notifications For Completed Tasks | N             | Enables receiving task notifications for tasks that have already been completed                       |

| User Name                                           | Default Value | Description                                                                                                                                |
|-----------------------------------------------------|---------------|--------------------------------------------------------------------------------------------------------------------------------------------|
| Notification List Appointment Notifications Enabled | Y             | Enables receiving appointment notifications in the notifications list                                                                      |
| Email and List Appointment Notifications Enabled    | NA            | Enables receiving appointment notifications in the notifications list and through email                                                    |
| Notification List Appointment Notifications Enabled | Y             | Enables receiving appointment notifications in the notifications list                                                                      |
| E-Mail Task Notifications Enabled                   | Y             | Enables receiving task notifications by email                                                                                              |
| E-Mail Appointment Reminders Enabled                | Y             | Enables receiving appointment reminders by email notifications                                                                             |
| Notification List Appointment Reminders Enabled     | N             | Enables receiving appointment reminders in the notifications list                                                                          |
| Owner Initiated Task Notifications Enabled          | N             | Enables receiving task notifications when a user creates, updates, or deletes a task and he's the owner of the task                        |
| Owner Initiated Appointment Notifications Enabled   | N             | Enables receiving appointment notifications when a user creates, updates, or deletes an appointment and she's the owner of the appointment |

## How to Disable Notifications for the Entire Company

You can disable activity notifications globally, so that no one in the company receives notifications. To disable notifications:

1. In the Setup and Maintenance area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. Enter the profile option to disable email or appointment notification, in the Profile Option Code field. Here the items you can disable and the profile options you use to disable them, company-wide:

| What to Disable                | Profile Option                        |
|--------------------------------|---------------------------------------|
| Appointment email notification | ZMM_ACTIVITY_DISABLE_EMAIL_APPT_NOTIF |
| Task email notification        | ZMM_ACTIVITY_DISABLE_EMAIL_TASK_NOTIF |



| What to Disable                                   | Profile Option                       |
|---------------------------------------------------|--------------------------------------|
| Appointment notification in the notification list | ZMM_ACTIVITY_DISABLE_LIST_APPT_NOTIF |
| Task notification in the notification list        | ZMM_ACTIVITY_DISABLE_LIST_TASK_NOTIF |

- For each item you're disabling, change the related site-level profile value to Yes.

#### Related Topics

- [Enable Drill-Down Capabilities in Notifications](#)
- [Get Reminded When a Task Is Due](#)

## Enable Drill-Down Capabilities in Notifications

You can enable salespeople to drill down to an activity from a notification list or an email. To use the enhanced notifications feature, salespeople must set their preferences to accept notifications.

You enable the enhanced capabilities by opting in to the feature and setting profile options. With enhanced notifications, salespeople can take actions on an activity from a notification list or an email. For example, they can click a link in an email to accept or decline an appointment or mark a task as completed.

**Note:** While you can revert to opt out of the enhanced notifications, Oracle recommends that you don't opt out of the enhanced notifications between releases.

### Setup Overview

Here are the high-level steps to set up enhanced notifications:

- Opt in to the Activity Drill-down and Actionable Notification feature in Setup and Maintenance.
- Set site-level profile options that enable the notifications.
- Set profile options that enable users to set their preferences for notifications. The profile options can be set at site-level or user-level.

If salespeople opt in for the capability to drill down and act from activity notifications, then they receive both a notification list and an email. Salespeople don't have the option to choose only one type of notification.

### Opt in to Activity Drill-Down and Actionable Notifications

To opt in to the Activity Drill-Down and Actionable Notifications feature:

- Sign in as a setup user.
- In the Setup and Maintenance area, go to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
- Click the drop-down button on Sales Foundation.

4. Click **Change Feature Selection**.
5. In the Edit Features: Sales Foundation page, select the **Enable** check box for the Activity Drill-down and Actionable Notification.
6. Click **Done**.

To revert to the earlier setup, clear the Enable check box and save your changes.

## Set Profile Options to Enable the Notifications

Use profile options to enable email or list notifications at the site level. After you enable the profile options, if salespeople opt in for enhanced notifications, then they receive both list and email notifications with drill-down capabilities.

To set the profile options:

1. In the Setup and Maintenance area, go to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. Search for the profile option, update it, and save your changes.

Here are the profile options to set:

| Profile Display Name                             | Profile Option Code                | Description                                                        |
|--------------------------------------------------|------------------------------------|--------------------------------------------------------------------|
| Email and List Appointment Notifications Enabled | ZMM_ACTIVITY_APPT_NOTIF_LIST_EMAIL | Enables appointment notifications in notification lists and emails |
| E-Mail and List Task Notifications Enabled       | ZMM_ACTIVITY_TASK_NOTIF_LIST_EMAIL | Enables task notifications in notification lists and emails        |

In addition to enabling the site-level profile options, you must also enable profile options for the user preference settings. Here are the profile options that you enable at site or user level:

| Profile Display Name                                                    | Profile Option Code             | Description                                                                                                                          |
|-------------------------------------------------------------------------|---------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| Email and List Task Notifications Enabled as per User Preference        | ZMM_ACTIVITY_TASK_NOTIFICATIONS | Enables users to receive task notifications in the notification list and through email according to their preference settings        |
| Email and List Appointment Notifications Enabled as per User Preference | ZMM_ACTIVITY_APPT_NOTIFICATIONS | Enables users to receive appointment notifications in the notification list and through email according to their preference settings |

## Get Reminded When a Task Is Due

You can configure the application so that salespeople are reminded by email or get an alert in the Notifications area when their tasks are due.

To get the reminders, salespeople simply configure the default reminder period in their user preferences. As an administrator, you can enable or disable the reminder notifications across the site and for individual users. You can specify whether to notify users via email, notifications, or both. You can configure the default reminder profile option to set a default reminder period based on the task due date. For example, you can configure whether to send a notification three days before the task due date or when the task due date is reached.

Additionally, you need to enable the Due Date field on the Task Create and Task Details page layouts. See [Add Due Date Reminder Field to the UI](#) for more information.

For the procedure to set the profile options, see [Set Task Reminder Profile Options](#).

### Set Task Reminder Profile Options

Set profile options to configure task reminders for sales users.

Here's how to set the profile options:

**Note:** These two site-wide profile options need to be enabled as well: Disable Task E-Mail Notification and Disable Task Notification List. See [Set Up Activity Notifications](#).

1. In the Setup and Maintenance area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. On the Manage Activity Profile Options page, access and enable these profile options:
  - o ORA\_ZMM\_TASK\_NOTIF\_LIST\_REMINDER: Enable to show task reminders in the Notifications area.
  - o ORA\_ZMM\_TASK\_EMAIL\_REMINDER: Enable to show task reminders by email.
  - o ORA\_ZMM\_TASK\_DEFAULT\_REMINDER: Set a default reminder period.
3. Save your changes.

### Add Due Date Reminder Field to the UI

Add a Due Date Reminder field to the Create Task and Edit Task pages in the Activities UI to let salespeople configure their default reminder time for tasks.

Here's how you enable the Due Date Reminder field to allow salespeople to set a reminder period

1. In an active sandbox, use Navigator to go to **Configuration > Application Composer > Activity > Pages**.
2. Add the **Due Date Reminder** field to the Task Create and Task Details page layouts.
3. Save your changes and publish the sandbox.

## How do I delegate activities to another user?

You can enable the ability for all sales users in your implementation to delegate their activities, such as delegating calendar appointments or tasks, to another user. To enable delegation, you set separate profile options for appointments and tasks.

When users delegate an activity, they're simply changing the owner of the activity. After an activity is delegated, both the original owner and the user who now owns the activity can edit or update the activity.

To enable activity delegation:

1. In Setup and Maintenance, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. Search for and set two profile options according to your business needs. This table lists the profile options:

| Profile Option Display Name    | Profile Option Code          | Description and Setting                                                                                                                                    |
|--------------------------------|------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Appointment Delegation Enabled | ZMM_ACTIVITY_APPT_DELEGATION | Enables sales users to delegate appointments to other sales users. Set to Yes at site level to enable all users in the site to use the delegation feature. |
| Task Delegation Enabled        | ZMM_ACTIVITY_TASK_DELEGATION | Enables sales users to delegate tasks to other sales users. Set to Yes at site level to enable all users in the site to use the delegation feature.        |

3. Save your changes.

### Disable Delegation

Turn off delegation if you no longer want the second owner to co-own the activity.

## Activity Types and Subtypes

### About Activity Type and Subtype

Managers can track the performance of salespeople by their activity type, such as an email or a call. Managers can further track details of an activity using the Activity Subtype field.

For example, the activity type email can have subtypes of outbound, inbound, and others. The Activity Subtype field is dependent on the Activity Type value. Each activity type has a function. The supplied functions are Appointment, Task, and Call Report.

The application populates the type and subtype values from the parent activity to the child activity. After you add the Activity Subtype field to the application, you can:

- Create values for the Subtype field, depending on the type of activity.
- Define relationships between the two values.
- Autopopulate the type and subtype values for:
  - Autocreated tasks, such as logging a call.
  - Followup activities created in the context of an activity, such as creating a call report.
  - Followup appointment or task.
- Autopopulate supplied values from the parent activity when you create a call report or a followup appointment or task.
- Add a new type using the **Manage Activity Type and Subtype** task.

**Note:** If you add a new lookup type, ensure that the lookup code tag has: `APPOINTMENT:TASK:CALLREPORT`.

Use Application Composer to make the Subtype field available on the create and edit pages of appointments, tasks, call reports, and list pages in the Activities UI. Use the Manage Activity Type and Subtype task to create and edit type and subtype values related to activities. See [Add an Activity Subtype Field](#) for more information.

## Add an Activity Subtype Field

Add the Subtype field to activities so that salespeople can classify their activities in detail for each activity type, such as an appointment, task, or call report. You enable the Subtype field in Activities using Application Composer.

Here's how to enable the Subtype field:

1. Ensure you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.
3. In the Objects navigation tree, expand **Standard Objects** and then expand **Account**.
4. Click the **Pages** node.
5. Ensure that the **Application Pages** tab is selected.
6. On the Details Page Layouts region, duplicate the predefined layout and edit the resulting copy.
7. While editing the copied layout, click the **Reorder Subtabs** icon.
8. In the Configure Subtabs popup window, move the **Reference Systems** subtab to the Selected Subtabs box.
9. Click **OK** on the popup window.
10. Click **Done** in the edit page.
11. Test the changes and publish the sandbox according to your company's business practices.

**Note:** Remember, salespeople can select subtypes only for active activity types. And, the subtype field is always dependent on the activity type selected.

## Associate Activity Type with a Function and Subtype

Activity types categorize the actions of salespeople. When you associate an activity type with a function and subtype, salespeople can further classify details of an activity.

You can associate a type value with one or more activity function types, such as an appointment, a task, or a call report. Then, you can map the activity type with a subtype. Use lookup types to associate a type value with a function type.

**Note:** If you don't associate an activity type value with a function type, users won't be able to see that value in the UI. For example, if you add an activity type value of Zoom, you must associate that type value with the Appointment function type or users won't be able to see it.

Here's how to associate a type value with a function and then with a subtype.

1. In Setup and Maintenance, go to:
  - Offering: Sales
  - Functional Area: Sales Foundation
2. Search for Manage Activity.
3. Click the **Manage Activity Type and Subtype** task.
4. In the Manage Activity Types: Manage Activity Types by Function page, select the relevant activity type. For example, for the activity type Call, select Appointments, Call Reports, and Tasks. The activity type is now mapped to the activity function.
5. Click **Next**. The Manage Activity Subtypes: Manage Subtypes by Activity Type page appears.
6. Map the activity type to a subtype. For example:
  - Select **Call** in the Select Activity Type field and then click the add icon.
  - Create subtypes of **Inbound** and **Outbound**.
  - Select the **Enabled** option.
7. Click **Save and Close**. The activity type is mapped to the subtype.

## Additional Configurations

### Let Salespeople Associate Addresses with Activities

You can enable selection of addresses from a drop-down list. From the address selector users can then select an address that's associated with an activity's account or contact.

The address for activities can be exposed on the create and edit pages of tasks, appointments or call reports.

Here's how to expose the address selector using the Application Composer:

1. Ensure you're working in an active sandbox
2. Navigate to **Configuration > Application Composer**.
3. In the Objects navigation tree, expand **Standard Objects** and then expand **Activity**.
4. Click the **Pages** node.
5. Ensure that the **Application Pages** tab is selected.
6. Scroll down to a section where you want to expose the address selector:
  - Creation Page Layouts: Task Create, Call Report Create, Appointment Create
  - Details Page Layouts: Task Details, Call Report Details, Appointment Details
7. Duplicate the required standard layout and edit the resulting copy.
8. Click **Show** next to the Address option to enable the address selector.

9. Click **Done**.
10. To validate whether the address selector is available on the Activities UI:
  - a. Navigate back to the respective Task, Appointment, or Call Report pages.
  - b. Click **Create** or **Edit** on the Task, Appointment, or Call Report page on which you enabled the address selector. Ensure that you can view the address selector on the page.
11. Publish the sandbox according to your company's business practices.

## View and Edit Calendar Appointments of Users

As a sales administrator, you can view and edit the calendar appointments of your users by enabling the profile option, Share All Appointment Details (ZMM\_ACTIVITY\_SHARE\_ALL\_APPT\_DETAILS), at site level.

Here's how to set the profile option:

1. In the Setup and Maintenance area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. Search for the Share All Appointment Details (ZMM\_ACTIVITY\_SHARE\_ALL\_APPT\_DETAILS) profile option and set it to **Yes** at site level.

**Note:** The users whose appointments you want to view must not have set them to private.

### Related Topics

- [Make Your Calendar Appointments Visible to Others](#)
- [Can my administrator view and edit my appointments?](#)

## Allow Updating of External Appointments

The salespeople who use Microsoft 365 add-in can share external appointments with the sales application. Even though the appointment is external to the company, you may want to let salespeople edit certain details, such as the account, opportunity, and lead.

Remember that the meeting details, such as day, time, description, and location, will still be read-only.

Here's how you can enable updating the external appointments:

1. In the Setup and Maintenance work area, use the **Manage Administrator Profile Values** task:
  - o **Offering:** Sales
  - o **Functional Area:** Sales Foundation
  - o **Task:** Manage Administrator Profile Values
2. On the Manage Administrator Profile Values page, search for **External Appointments Editing Enabled** (ORA\_ZMM\_ENABLE\_EXTERNAL\_APPT\_EDIT) and set the **Site** value to **Yes**.

**3. Save and Close** the page.

**Note:** External appointments synced from Microsoft 365 should be linked to your sales data to allow for tracking and analytics.

## Change Calendar Colors

You can change the color of various items on salespeople's calendars. Providing color codes makes calendars look colorful and more friendly.

You can use any standard HTML color codes. You can find color codes in many places on the internet, for example, <http://html-color-codes.info/>.

### Change Calendar Colors

Here's how you change calendar colors:

1. In the Setup and Maintenance area, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Activity Standard Lookups
2. Click **ZMM\_ACTIVITY\_TYPE**. The ZMM\_ACTIVITY\_TYPE: Lookup Codes area appears.
3. In the **Tag** field, enter an HTML color code in for each item you want to change.
4. Click **Save and Close**.

**Note:** The ZMM\_ACTIVITY\_TYPE lookup type supports tags, but other Activity lookup types don't.

#### *Related Topics*

- [Manage Your Calendars](#)

## Enable Default Task Status

Administrators can set the default status of a task and provide a sequence number using the lookup type, ZMM\_ACTIVITY\_STATUS\_CD. The sequence that you define determines the sequence in which the task statuses are available for selection in the list of values.

Here's how to enable the default task status:

1. In the Setup and Maintenance area, go to:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Activity Standard Lookups
2. In the Manage Activity Standard Lookups page, click the **ZMM\_ACTIVITY\_STATUS\_CD** link. The ZMM\_ACTIVITY\_STATUS\_CD: Lookup Codes area appears.



3. Enter a display sequence. The lowest sequence number defines the default status of a task.
4. Click **Save and Close**.

## Considerations When Setting Up Call Reports

Call reports let salespeople capture the outcome of a sales activity, make related changes, and track key updates. When setting up call reports, consider these points:

- You can modify lookup types and profile options related to call reports.
- You can configure call reports using Application Composer, to suit the requirements of your organization.

### Modify Activity Objectives and Outcomes

Call reports record a snapshot of the outcome of a sales activity, including summaries, meeting minutes, complete objectives, attendees, attachments, notes, and so forth. You can use the **Manage Activity Standard Lookups** task in the Setup and Maintenance work area to update or modify the lookup type values for activity objectives and outcomes.

Here are the lookup types for objectives and outcomes:

| Lookup Type                | Display Name       | Description                               |
|----------------------------|--------------------|-------------------------------------------|
| ORA_ZMM_ACTIVITY_OBJECTIVE | Activity Objective | Possible objectives of a sales activity.  |
| ZMM_ACTIVITY_OUTCOME       | Activity Outcome   | Possible outcomes of a customer activity. |

**Note:** These lookup types don't support tags.

### Enable Call Report Submissions

Use the Submit Call Report Action Enabled (ZMM\_ACTIVITY\_ENABLE\_SUBMIT\_CALL\_REPORT) profile option to enable submission of call reports. These are the options:

- **Yes:** The Submit button is enabled on the Create Call Report page. When you click Submit, the application sets the call report to read-only and salespeople can't modify the call report.
- **No:** The Submit button isn't displayed on the Create Call Report page. This is the default value.

Access the profile option from the Manage Administrator Profile Values task in the Setup and Maintenance work area.

#### Related Topics

- [Track Updates with Call Reports](#)

## Enable Sales Team to Log Interactions

You can let your salespeople manually add call logs, web conferences, wrap ups, and emails as interactions and view them in the Interactions History subtab instead of activities.

In CX sales, these interactions are considered as activities. In Digital Sales, these are interactions tracked in the list of Activities for each record. The Activity work area in CX sales only displays tasks and appointments. This way all the planned communication can be tracked as activities and the actual communication will be tracked as interactions in the sales application.

If you're new to CX Sales or transitioning to Digital Sales, Oracle recommends you enable logging sales interactions.

To enable logging interactions, grant the required privileges and configure the setups outlined in the table here:

| Prerequisite                                | Prerequisite Type           | Description                                                                                                                                                                                                                     | What You Need to Do                                                                                                                                                    |
|---------------------------------------------|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| ZCM_MANAGE_SALES_INTERACTIONS_PRIV          | Role Privilege              | Enables your users to log interactions.                                                                                                                                                                                         | Add the privilege to the users with the sales administrator, sales manager, and salesperson roles.                                                                     |
| ORA_ZCA_ENABLE_TRACKING_EMAIL_CONVERSATIONS | Profile Option              | Enables users to share emails as conversations from the Microsoft 365 add-in and see them in the Interactions History subtab. See the topic <i>Autosync the Email Responses of Manually Shared Emails</i> for more information. | Set it to Y or Yes.                                                                                                                                                    |
| ORA_ZCA_ENABLE_TRACKING_INTERACTIONS        | Profile Option              | Enables users to see emails and call logs in the Interactions History subtab instead of activities.                                                                                                                             | Set it to Y or Yes.                                                                                                                                                    |
| SVC_MCA_RECORD_ACTIVITIES_YN                | Profile Option              | Generates tasks and call reports automatically and shows them on the Activities tab. See the topic <i>Configure Multichannel Architecture (MCA) Profile Options</i> for more information.                                       | Set it to <b>No</b> .                                                                                                                                                  |
| Interactions History                        | Subtab on the object pages. | From this subtab, you can review all the previous interactions and add call logs and emails manually to an opportunity or a lead.                                                                                               | Enable this subtab on the relevant object pages. See <i>How to Add the Interactions History Subtab to Opportunities</i> for more information.                          |
| Log an Interaction                          | Smart action for Workspace. | Users can log interactions from the object pages of Workspace.                                                                                                                                                                  | Enable the smart action on relevant object pages of Workspace from the Application Composer. See the topic <i>Manage Workspace Smart Actions</i> for more information. |
| Log a Call                                  | Smart action for Workspace. | Users can log a call from the object pages of Workspace.                                                                                                                                                                        | <b>Disable</b> the smart action for all the objects.                                                                                                                   |

## Where can Salespeople See and Log the Interactions

After you complete the setup, the calls and emails logged from the object pages of sales application will be available in the Activities panel of the object foldout view in Digital Sales. Similarly, the calls and emails logged from Digital Sales will be available in the Interactions History subtab of the object pages in the CX Sales application.

Calls and emails logged prior to enabling interactions remain in Activities and are available for historical context.

Salespeople can log the interactions using the:

- Log an Interaction button on the Interactions History subtab of the object pages of the sales application.
- Log an email button on the Interactions History subtab of the object pages of the sales application.
- Log an Interaction smart action from the Workspace action menus on all the relevant object pages of Workspace.

**Note:** Salespeople won't be able to log a call from activities or use the Log a Call smart action on the object pages of Workspace.



# 17 Notifications

## Overview of Configuring Notifications for Sales

A notification is an alert for users, such as salespeople and managers, to notify them about an event on a business object, such as an account, and let them take necessary actions. Enabling notifications is a global setup.

You can generate, configure, and enable notifications for Sales objects such as accounts, contacts, leads, and opportunities.

Depending on your configuration, the application sends notifications to users when there are updates to records. When configuring notifications, you determine who receives the notifications and when they receive them.

**Note:** All of these types of notifications appear at the top of the page under Notifications (the bell icon). When users click the notification icon, they're directed to the appropriate page for your enabled UI.

Use this chapter to learn to do these tasks:

- Enable notifications for Sales
- Define notification scripts for Sales
- Set notification preferences for Sales
- Debug groovy prompts
- Configure push notifications

This table lists the tasks, navigation path, and topics in this chapter where you can get more information.

| Step | Description                                              | Navigation                                                                                  | Where to Get More Details                                                        |
|------|----------------------------------------------------------|---------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------|
| 1    | Enable notifications for sales objects.                  | Setup and Maintenance                                                                       | See: <a href="#">Enable Notifications for Sales</a>                              |
| 2    | Get an overview of the tasks to configure notifications. | Application Composer > Standard Objects > Server Scripts                                    | See: <a href="#">Overview of Setting Up Notification Scripts and Preferences</a> |
| 3    | Define Groovy scripts using Application Composer.        | Application Composer > Standard Objects > expand the object you want > click Server Scripts | See: <a href="#">Define Notification Scripts for Sales</a>                       |
| 4    | Configure notification rules.                            | Tools > Notification Preferences                                                            | See: <a href="#">Configure Delivery Preferences and Text for a Notification</a>  |
| 5    | View the runtime log and debug your Groovy script.       | Application Composer > Expand Objects, Common Setup > Run Time Messages                     | See: <a href="#">Debug Groovy Prompts</a>                                        |

| Step | Description                           | Navigation            | Where to Get More Details         |
|------|---------------------------------------|-----------------------|-----------------------------------|
| 6    | Push notifications to mobile devices. | Setup and Maintenance | See: Configure Push Notifications |

#### Related Topics

- [View and Act On Notifications](#)

## Enable Notifications for Sales

You define and generate notifications with a Groovy script in Application Composer, using conditions that must be met for each notification. When a notification is created on an account that salespeople own, you can specify the notification recipients.

For example, you can reference sample Groovy scripts to define and activate notifications for salespeople when:

- They're added to the account team.
- They're designated as owner of an account.
- An account they own has been deleted.
- A sales object is assigned to an account.

**Note:** Before you enable notifications for sales, ensure that you have enabled notifications generally. For steps, see the topic about enabling and disabling notifications, linked in the Related Topics section. If you update the applications, be sure to go back and check these settings again.

Notifications are lined up in a queue, and you can manually add a record to a queue by changing the owner. Or, you can add a notification to a queue based on specific criteria. You can use a rule or condition to add leads to a queue based on specific record criteria, for example. Records remain in a queue until they're assigned an owner.

Here's how you enable notifications.

1. Sign in as a setup user.
2. In the Setup and Maintenance go to:
  - Offering: Sales
  - Functional Area: Sales Foundation
3. Click the drop-down button in the Sales Foundation row.
4. Click **Change Feature Selection** in the menu. The Edit Features: Sales Foundation page appears.
5. Select the **Enable** check box for the notification-related features you want to set up. This enables notifications for the Sales objects.

**Note:** This opt-in is for your chosen channel or communication path, such as bell notifications, and not for specific objects.

6. Click **Done**.

### Related Topics

- [Disable or Enable Workflow Notifications](#)
- [About Object Workflows](#)
- [Best Practices for Content and Layout in Workflow Notifications](#)

## Overview of Setting Up Notification Scripts and Preferences

After you enable the notifications feature for sales, you then configure the notifications.

Here are the overall steps:

1. Define notification prompts as Groovy scripts in Application Composer. The scripts contain the conditions that must be met for each notification. Notifications are sent when the defined conditions are met. For example, you can send a notification when a sales object is assigned to an account.  
For more information about defining notification prompts, see [Define Notification Scripts for Sales](#).
2. Configure notification preferences using the Notification Preferences page. For example, configure the notification message using SmartText and specify the notification recipient.  
For more information about notification preferences, see [Configure Delivery Preferences and Text for a Notification](#).

## Define Notification Scripts for Sales

Here's how you define a Groovy script for a notification prompt:

1. Ensure you're working in an active sandbox.
2. Click **Navigators > Configuration > Application Composer**.
3. In the navigation tree, expand Standard Objects, expand the object you want, and then click **Server Scripts**. For example, **Standard Objects > Account > Server Scripts**.
4. Click the **Triggers** tab on the Server Scripts page.
5. Click the add icon.
6. In the Create Trigger Object page, create the Groovy trigger:
  - a. In the **Trigger** field, select the trigger type.  
Oracle recommends that you use the trigger type **After Changes Posted to Database**. This trigger type lets you to stop potential issues if the Groovy script is accidentally written to run indefinitely. If the trigger type is set to Before Update to Database, with a bad script, you may receive errors.  
If you're creating a new object, and you want to trigger a notification when the object is created, Oracle recommends that you use the trigger type **Before Insert to Database**. However, some of the Before trigger types don't have all attributes exposed yet, resulting in some fields being blank. To debug your triggers if you're not getting the expected results, follow the steps in [Debug Your Groovy Scripts](#).
  - b. Enter a name for the trigger.

- c. Enter the trigger Definition details. When you create a Groovy script, you need the API names of the fields you're trying to access. Create your triggers based on parent/child fields, with these steps:
  - i. In the Trigger Definition section, click **Show/Hide Expression Palette**.
  - ii. Click the **Fields** tab.
  - iii. Select an **Object**.
  - iv. Click the **Maximize Edit Script** arrow. The fields for the selected object are displayed.
  - v. Select the API you want, and click Insert.
  - vi. To close the expression palette, click the **Restore Edit Script** arrow, and then click **Show/Hide Expression Palette**.  
 The `isAttributeChanged()` function works only for the Before trigger types. The workaround for the After trigger types involves retrieving the old value before the database is updated, then retrieving the new value after the update, and then comparing the two values to see whether the attribute is changed. However, this workaround works only for high-level attributes, such as CriticalFlag and Status, and not for the ViewRow attribute.
7. Add a Groovy script. For example, if you're defining the notification for accounts, add the `Account Push notification received` Groovy script.
8. Click **Save and Close**.
9. Navigate to the Notification Preferences page to configure your preferences for the notifications. See [Configure Delivery Preferences and Text for a Notification](#) for more information.

**Note:** You can reuse a Groovy notification prompt if no other notification uses it.

#### Related Topics

- [Overview of Sandboxes](#)
- [Create and Activate Sandboxes](#)
- [Publish Sandboxes](#)

## Configure Delivery Preferences and Text for a Notification

Here's how you specify the recipient types, delivery methods, and notification text for a specific trigger event:

1. Sign in as a user with the Sales Administrator job role.
2. In the Navigator, click **Tools > Notification Preferences**.
3. In the Notification Preferences page, select an object from the **Object** list.
4. Click **Add** to add a blank row to the table.
5. Select **Yes** from the Enabled drop-down list
6. In the **Override** field, select Yes or No:  
 Override lets you specify whether a user has the ability to opt-out of the notification. If you set it to no, users can't opt out of the notification.
7. Select a Groovy notification prompt from the **Triggering Event** list.
8. Enter the notification name and description. The text you enter into the Notification Name field becomes the first part of the notification subject.



9. In the Recipients column, click the edit icon.
10. In the Configuration for Trigger Name window, select the notification delivery options for recipients and then click **Done**.

The application sends notifications to the specified recipients only if you select at least one delivery method, so be sure to select at least one method. In addition to getting communication through the selected delivery method, the recipient also receives a bell notification. Select the **Bell Notifications** option to enable the notifications that appear in the global header.

See the tables later in this topic for more information about the supplied recipients and delivery methods.
11. Click the **New SmartText** link, enter the notification text for the selected object, and then click **Publish**. SmartText also lets you add variables to the notification message.
12. To delete a notification preference, select the row and click **Delete**. This action deletes any associated notification text, too.

**Note:** If you delete a notification that's generated using a Groovy script, you can create a new notification using the same Groovy script, if it isn't used by another notification.
13. To modify an existing notification text, click the **Update SmartText** icon for the selected row.
14. Click **Save**.

Here are the predefined notification recipients:

| Recipient           | Description                                                                                                                                                 |
|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manager of Owner ID | Manager of the notification owner                                                                                                                           |
| Owner ID            | The one who sends or assigns the notification                                                                                                               |
| Resource team       | Additional resources added to an object in the Team subtab (Fusion Service only)<br><br><b>Note:</b><br>Resource teams aren't applicable for Digital Sales. |

Here are the predefined delivery methods:

| Delivery Method       | Description                                                                     |
|-----------------------|---------------------------------------------------------------------------------|
| Bell Notifications    | Enables the bell notification for the web application                           |
| Mobile Notifications  | Enables notifications on the mobile application                                 |
| Browser Notifications | Enables notifications to users in the Omnichannel toolbar (Fusion Service only) |
| Email Notifications   | Enables email notifications                                                     |

For more information about using SmartText, see topics on using smart texts in the Using Fusion Service guide.

**Note:** In the sales applications, activities (tasks and appointments) use a different model to set up notifications. For more information on how to set up notifications for activities, see the "Set Up Activity Notifications" topic in the Activities chapter in the Implementing Sales guide.

#### Related Topics

- [Set Up Activity Notifications](#)
- [How You Use SmartText in Service Requests](#)
- [What are the SmartText naming conventions?](#)

## Debug Your Groovy Scripts

Use the Groovy debugger in Application Composer to debug the object functions and validations that you defined for an object. While debugging, you can also examine object and attribute values. Access the debugger from either the Custom Objects or Standard Objects page.

### Accessing the Debugger

Access the debugger from either the Custom Objects or Standard Objects page in Application Composer.

To access the debugger:

1. In Application Composer, under the Objects tree, click either the Custom Objects or Standard Objects link.
2. On the resulting Objects page for either custom or standard objects, select the object that you want to debug and then click the debugger icon in the table's toolbar.  
The debugger icon is a ladybug.
3. On the debugger UI, examine the object functions and validations defined in Groovy for that object.

### Using the Debugger

The debugger contains multiple regions, described in the following table, which you can use to debug your scripts for an object:

| Debugger Region    | Description                                                                                                                                                                                                                                                                                                                                     |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Main toolbar       | From the toolbar, you can select the object to examine and start the debugging process.                                                                                                                                                                                                                                                         |
| Left pane region   | This region displays the object functions and validations defined for the selected object.                                                                                                                                                                                                                                                      |
| Main script region | This region displays the selected Groovy script.                                                                                                                                                                                                                                                                                                |
| Stack region       | This region displays the call stack. For example, assume there are two functions, Function1 and Function2. Function1 calls Function2. When debugging within Function2, the Stack region displays which statement from Function2 is currently being executed, as well as information about the parent Function1 from where Function2 was called. |

| Debugger Region  | Description                                                                                                                                                                                                |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Variables region | This region displays variables and associated values.                                                                                                                                                      |
| Breakpoints tab  | This tab displays which statement (line number) has a breakpoint. A breakpoint is a location in a Groovy script where you want the script to pause during debugging. The debugger stops at that statement. |
| Log tab          | This tab displays all logs. If the script has any <code>println()</code> statements, then those values are captured on this tab.                                                                           |

To use the debugger:

1. In Application Composer, under the Objects tree, click either the Custom Objects or Standard Objects link.
2. On the resulting Objects page for either custom or standard objects, select the object that you want to debug and then click the debugger icon in the table's toolbar.
3. On the debugger UI, the left pane displays the object functions and validations defined in Groovy for that object. Select the script that you want to review.  
The script is displayed in the main script region.
4. To start debugging, click one of these icons in the toolbar:
  - Step Over  
Review one statement in the selected script at a time.
  - Step Into  
If a statement in execution is a call to some function, and you want to debug inside that function, then click **Step Into**.
  - Step Out  
If you are debugging inside a child function and you want to move the control back to the parent function, then click **Step Out**.
  - Run  
Move to the next breakpoint in the script. If no further breakpoints exist, then the debugger completes its evaluation of the selected script and then closes the debugger session.

## Enabling and Disabling the Debugger

The debugger is enabled by default. However, if you want to hide the debugger, or later show it again, then set the ADF: Enable Script Debugger profile option.

To set the ADF: Enable Script Debugger profile option:

1. In the Setup and Maintenance work area, select the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values  
The Manage Administrator Profile Values page appears.

2. In the Profile Display Name field, enter **ADF: Enable Script Debugger** and click **Search**.
3. In the Profile Values region, at the Site level, enter either **TRUE** or **FALSE**.
  - TRUE displays the debugger.
  - FALSE hides the debugger.

## Sample Groovy Scripts for Notifications

Use Groovy scripts to define the start of notifications. Here's sample code to generate notifications to the recipients specified in the Notification Preferences page for sales objects. You can modify the scripts to fit your requirements.

### Scripts for Standard Objects

Here are sample scripts for standard sales objects:

| Object   | Scenario                   | Create and Assign Scripts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------|----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Accounts | Push notification received | <p>Account Create</p> <pre>// Send notification to Owner when Account is created // Use trigger type BEFORE INSERT TO DATABASE def map = new HashMap(); // Specify one or more channels map.put("Channels", ["ORA_SVC_BELL"]); // Specify default MessageText def messageText = "Account created with name: " + OrganizationName; map.put("MessageText", messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId", OwnerPartyId); adf.util.sendNotification(adf, map)</pre>                                                                                                            |
| Accounts | Drill down to details page | <p>Account Assign</p> <pre>// Send notification to Owner when Account is assigned to them // Use trigger type BEFORE UPDATE TO DATABASE if (isAttributeChanged('OwnerPartyId')) { try { def map = new HashMap(); def messageText = "This Account has been assigned to you" def recipientPartyId = OwnerPartyId // Specify one or more channels map.put("Channels", ["ORA_SVC_ BELL"]); // Specify default MessageText map.put("MessageText", messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId", recipientPartyId); if (recipientPartyId) { adf.util.sendNotification(adf,</pre> |

| Object   | Scenario                   | Create and Assign Scripts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|----------|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|          |                            | <pre>map) } else { println("No Owner associated with this Account") } } catch (e) { throw new oracle.jbo.ValidationException('Failure: ' + e.getMessage()) } }</pre>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| Contacts | Push notification received | <p>Contact Create</p> <pre>// Send notification to Owner when Contact is created // Use trigger type BEFORE INSERT TO DATABASE def map = new HashMap(); // Specify one or more channels map.put("Channels", [ "ORA_SVC_BELL"]); // Specify default MessageText def messageText = "Contact created with name: " + PersonName; map.put("MessageText", messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId", OwnerPartyId); adf.util.sendNotification(adf, map)</pre>                                                                                                                                                                                                                                                                           |
| Contacts | Drill down to details page | <p>Contact Assign</p> <pre>// Send notification to Owner when Contact is assigned to them // Use trigger type BEFORE UPDATE TO DATABASE if (isAttributeChanged('OwnerPartyId')) { try { def map = new HashMap(); def messageText = "This Contact has been assigned to you" def recipientPartyId = OwnerPartyId // Specify one or more channels map.put("Channels",[ "ORA_SVC_ BELL"]); // Specify default MessageText map.put("MessageText", messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId", recipientPartyId); if (recipientPartyId) { adf.util.sendNotification(adf, map) } else { println("No Owner associated with this Contact") } } catch (e) { throw new oracle.jbo.ValidationException('Failure: ' + e.getMessage()) } }</pre> |
| Leads    | Push notification received | <p>Lead Create</p> <pre>// Send notification to Owner when Lead is created // Use trigger type BEFORE INSERT TO DATABASE def map = new HashMap(); //give lead object API name def objectCode = 'Mk1LeadVO' map.put("ObjectCode", objectCode) // Specify one or more channels map.put("Channels", ["ORA_SVC_BELL"]); // Specify default MessageText def messageText = "Lead created with name: "</pre>                                                                                                                                                                                                                                                                                                                                                                                |

| Object        | Scenario                   | Create and Assign Scripts                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|---------------|----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|               |                            | <pre>+ Name; map.put("MessageText",   messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId",   OwnerId); adf.util.sendNotification(adf, map);</pre>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Leads         | Drill down to details page | <p>Lead Assign</p> <pre>Lead Assign // Send notification to Owner when Lead is assigned to them // Use trigger type BEFORE UPDATE TO DATABASE if (isAttributeChanged('OwnerId')) { try { def map = new HashMap(); def messageText = "This Lead has been assigned to you" def recipientPartyId = OwnerId // Specify one or more channels map.put("Channels",["ORA_SVC_ BELL"]); // Specify default MessageText map.put("MessageText",   messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId",   recipientPartyId); if (recipientPartyId) { adf.util.sendNotification(adf,   map) } else { println("No Owner associated with this Lead") } } catch (e) { throw new oracle.jbo.ValidationException('Failure: ' + e.getMessage()) } }</pre> |
| Opportunities | Push notification received | <p>Opportunity Create</p> <pre>// Send notification to Owner when Opportunity is created // Use trigger type BEFORE INSERT TO DATABASE def map = new HashMap(); // Specify one or more channels map.put("Channels",["ORA_SVC_ BELL"]); // Specify default MessageText def messageText = "Opportunity created with name: " + Name; map.put("MessageText",   messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId",   OwnerResourcePartyId); adf.util.sendNotification(adf, map)</pre>                                                                                                                                                                                                                                                     |
| Opportunities | Drill down to details page | <p>Opportunity Assign</p> <pre>// Send notification to Owner when Opportunity is assigned to them // Use trigger type BEFORE UPDATE TO DATABASE if (isAttributeChanged('OwnerResourcePartyId')) { try { def map = new HashMap(); def messageText = "This Opportunity has been assigned to you" def recipientPartyId</pre>                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

| Object | Scenario | Create and Assign Scripts                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|--------|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|        |          | <pre>= OwnerResourcePartyId // Specify one or more channels map.put("Channels",[ "ORA_SVC_ BELL"]); // Specify default MessageText map.put("MessageText", messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId", recipientPartyId); if (recipientPartyId) { adf.util.sendNotification(adf, map) } else { println("No Owner associated with this Opportunity") } } catch (e) { throw new oracle.jbo.ValidationException('Failure: ' + e.getMessage()) } }</pre> |

**Tip:** In these scripts, you're only enabling the bell icon in the global header. To enable notifications for other channels (for example, browser and mobile), use this syntax: `// Specify one or more channels map.put("Channels", ["ORA_SVC_BELL", "ORA_SVC_OMNI", "ORA_SVC_MOBILE"]);`

- ORA\_SVC\_BELL: Notifications icon in the global header
- ORA\_SVC\_OMNI: Notifications icon in the browser
- ORA\_SVC\_MOBILE: Mobile notifications

## Script for Custom Objects

You can use a Groovy script to send notifications for custom objects.

### Prerequisites:

- Use the global function, `adf.util.sendNotification (adf, map)`.
- The `ObjectCode` needs to be explicitly passed as part of the request parameter hash map in the Groovy trigger.
- Your custom object needs to be published.

| Object        | Scenario                                                        | Create and Assign Scripts                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------|-----------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Custom object | Send bell notification to the user based on the user's party ID | <pre>try { Long recipientPartyId = 100010037456865 def messageText = 'A custom object notification (default message).' def objectCode='CustomObject_SR_ c' def map = new HashMap(); map.put("Channels", ["ORA_SVC_BELL"]); map.put("MessageText", messageText); map.put("RecipientPartyId", recipientPartyId); map.put("ObjectCode", objectCode); adf.util.sendNotification(adf, map) println("Triggered a notification"); } catch (e) { //</pre> |

| Object | Scenario | Create and Assign Scripts                                                                                                                                                  |
|--------|----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|        |          | Log the failure in groovy logging. Logs can be viewed in 'Runtime Messages'. <code>println("Failure to trigger notification from Groovy Script " + e.getMessage());</code> |

To find the Object Code for your custom object, navigate to the overview page for the object. The API name is listed in the Object Information region of that page.

## Configure Push Notifications

With push notifications, users get notifications on their mobile devices. You define notifications in Application Composer with your unique, conditional logic. Devices such as iOS and Android support push notifications.

For example, you can define alerts for upcoming milestones, reassignments, or escalations. Define the starting point to send a notification when you assign a high-severity request to a user.

After they sign in to the mobile application, users can view a list of their notifications by clicking the Notifications icon on the global header. They can dismiss notifications after viewing or dismiss them in bulk.

As you implement push notifications, you decide when to raise each notification. You specify whether to enable mobile push notification alerts, or to deliver the alerts only to the bell notifications on the desktop application.

**Note:** If the Notifications feature is set up, it automatically sets up bell notifications. Delivery of bell notifications happens even if mobile notifications are disabled. Clicking a notification and navigating to the record details marks the notification as read, and it's cleared from the notification list.

Here's how you enable push notifications:

1. Ensure you're working in an active sandbox.
2. Navigate to Setup and Maintenance.
3. In the Setup and Maintenance area, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Click the drop-down button in the Sales Foundation row.
  - o Click View Feature Selection in the menu. The Edit Feature: Sales Foundation page appears.
4. Select the **Enable** check box for Mobile Notifications.
5. Publish the sandbox.



# 18 Approval Workflows

## Configure Workflow Approvals and Notifications

With approval management in BPM Worklist, you configure workflow tasks that users act on for approvals, including the notifications involved. For example, specify levels of approval needed, control approval routing, and configure email notifications.

After all assignees approve a workflow task, whatever got approved takes effect. Some tasks are just FYI, and assignees don't need to do anything. Either way, here are some examples of what you can do to configure workflow tasks, including notifications:

- Set how many levels of approval are needed for transactions over a particular amount
- Define whom the assignees would be, based on the supervisory hierarchy in Oracle Fusion Cloud HCM
- Create approval groups so that the workflow task can be assigned to the set of users in the group instead of an individual user
- Control when to send notifications to users involved with the task
- Disable or enable in-app or email notifications, or both

### Get Started

In the Offerings work area, enable the Approval Routing Administration feature at the offering level so that these setup tasks are available in the Application Extensions functional area:

- Manage Task Configurations
- Manage Approval Groups

These setup tasks take you to BPM Worklist, where you do most of the setup and configuration related to workflow. But, depending on your offering, you might use a different functional area or even another approval setup task. Some product families have pages or tools that you can use instead of, or in addition to, BPM Worklist, depending on what you want to configure.

### Manage Workflow Tasks

After users create a task, for example by submitting something for approval, you can use the Transaction Manager: Transactions page in the Transaction Console work area to keep track of the workflow task. And also to jump in when you need to, especially if something goes wrong.

For workflow data, you can use the tables that start with `FND_BPM` in the Oracle Fusion Cloud Applications Tables and Views for Common Features guide, and the Manage Tasks API in the REST API for Common Features in Oracle Fusion Cloud Applications guide. Don't query other tables or use other APIs that aren't documented.

### Related Topics

- [Oracle Fusion Cloud Applications Tables and Views for Common Features](#)
- [REST API for Common Features in Oracle Fusion Cloud Applications](#)
- [Configure Offerings](#)
- [How do I update existing setup data?](#)

## Create Approval Groups

An approval group is a set of specific users that can act on workflow tasks. You can set up approval rules so that tasks can get routed to an approval group. An approval group can contain other approval groups.

- When a task is assigned to an approval group in a parallel participant, someone in the group can claim the task and act on it. When the task is claimed, no one else in the group can act on it. But if the person who claimed the task releases it, then someone else from the group can claim it.
- If it's a serial participant instead, the task is routed to each member of the approval group in sequence, so everyone must act on it.
- There are two types of groups in workflow. One is the approval groups we are talking about here that you can use in task configurations to define routing. The other is LDAP groups that are available for users to select when they delegate or reassign tasks, but it's not recommended for them to use LDAP groups.

There aren't any predefined approval groups, so it's up to you if you want to create any. Here's how you go about it:

1. In the Setup and Maintenance work area, go to the **Manage Approval Groups** task in the Application Extensions functional area.
2. In BPM Worklist, on the Approval Groups tab, click the **Create Approval Group** icon in the **Groups** toolbar.
3. On the Details page, enter the group name.
4. In the Members section, click the **Add Member** icon.
5. In the Add to Group dialog box, select **User** or **Approval Group**, depending on what you want to add to your group.
6. Find and select the specific user or group, and click **OK**.
7. Add more members, and edit or delete any if you need to.

**Note:** For approval groups that you plan to use in serial participants, add members in the order that you want tasks to get assigned. If you add User 1, User 2, and then User 3, the task is first assigned to User 1, then User 2, and finally User 3.

8. Click **Save**.

**CAUTION:** Don't delete your approval group if it's used in at least one approval rule. You can still edit the group.

## Configure Approval Rule Sets and Rules

Rule sets and rules control how a workflow task is routed, assigned, and completed, based on specific conditions. For example, a rule can say that transactions over a certain amount must have approvals up three levels in the management chain.

A workflow task has one or more rule sets, and a rule set has one or more rules. At run time, if a rule set has multiple rules, all the rules are evaluated at the same time. A rule has two parts, an If section that has the conditions, or tests, and a Then section that has the actions to take when the conditions are met.

## Configure Rule Sets

First, create or find the rule set you want to work on:

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, search for the workflow task in the **Tasks to be configured** pane.
3. Select the task from the search results and click the **Edit task** icon in the toolbar.

**Note:** You may see a message saying that flexfields have been modified. This means someone used Application Composer to create new fields, which creates flexfields on the back end. Click the Start Synchronization button to get the latest set of flexfields that you can use for the rules in this task.

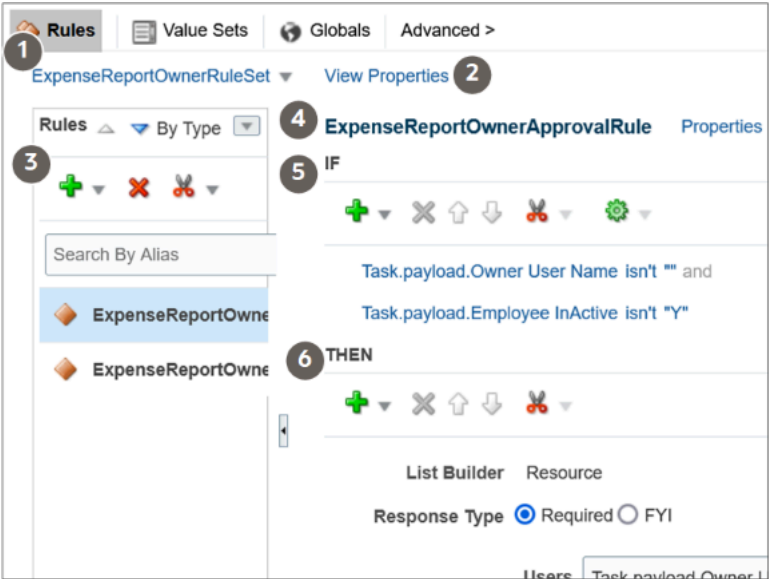
4. Click the Assignees subtab.
5. If the diagram mapping out the workflow task is big, click the **Switch to Vertical Layout** link.
6. In the diagram, find the participant you want to work on. Click the **Go to rule** icon and select **Go to rule**. Or, select the participant and, in the pane after the diagram, click the link in the **Business rule** field.
7. Go on to work on the rule set that's displayed on the Rules tab. Or, from the drop-down list with rule set names, select another rule set to edit, or select **Add New Rule Set**.
8. Click the **View Properties** link after the rule set name to see the **Effective Date** setting and **Active** check box. The rule set needs to be effective and active to apply when people create workflow tasks. It's a good idea to leave the effective date set to Always.

**CAUTION:** From here, you can also click the **Delete Rule Set** link. Before you delete any predefined rule sets, make sure you're really not using it and never will. Don't delete the predefined Modification Rules and Substitution Rules rule sets.

9. In the Rules pane, you can add, edit, or delete rules in the rule set. Expand the rule if it's not already. As with the rule set, you can click the **Show Advanced Settings** icon for a rule to make sure that the rule is effective and active.
  - o Create: Click the **Advanced Add or Modify Options** icon and select **General Rule**.
  - o Edit: Select the rule if it's not already.
  - o Delete: Select the rule and click the **Delete** icon in the toolbar in the Rules pane.

For the rule you're creating or editing, you can click the **Properties** link after the rule name to rename the rule and make sure that the rule is effective and active.

Here's a screenshot to help us understand what we see in the Rules subtab on the Assignees tab:



| Callout Number | What It Is                                                                                                                                  |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------|
| 1              | The rule set drop-down list, where you can select a rule set to work on or create a new rule set.                                           |
| 2              | The link to open properties for the rule set.                                                                                               |
| 3              | The Rules pane, which lists the rules within the rules set and has a toolbar for working on those rules, for example to add or delete them. |
| 4              | The names of the rule that's selected in the Rules pane, followed by a link to open properties for that rule.                               |
| 5              | The If section of the rule, where the conditions are defined and there's a toolbar for working on those conditions.                         |
| 6              | The Then section of the rule, which defines what happens when the conditions are met. There's also a toolbar specific to this section.      |

## Configure the If Section in Rules

In the If section of the rule, define conditions for the rule. Each line in this section is called a test.

1. For existing conditions, click on the line that you want to edit, making it active and selected. To add a new line, click the **Advanced Add or Modify Options** icon and select a type to add, for example **simple test**.
2. Click the **Left Value** icon to select an attribute in the Condition Browser dialog box.
3. Select an operator.
4. Click the **Right Value** icon to select something from the Condition Browser dialog box, or enter a value in the corresponding field.

5. If you're not working on the last line, you can click the **and** or **or** link at the end of the line to toggle between the two.

**CAUTION:** If the attribute you're evaluating in the condition is optional, users might not have entered a value for that attribute in the UI. For your rule to work properly, it's highly recommended that you first have a line in the condition that checks if the attribute isn't blank. So that means you select the attribute, select **isn't** as the operator, and enter **null**. Then add another line with the condition that you're evaluating the attribute for, and make sure you have an **and** between the two lines.

To delete a line, put your cursor in any field in the line, and click the **Delete** icon.

## Configure the Then Section in Rules

In the Then section of the rule, define what happens when the conditions in the If section are met.

1. Edit any existing actions. Or, click the **Insert Action** icon, and you usually select **Add Approver** and then a list builder, which controls how to route the task.
2. Fill in the rest of the section. The fields you get depends on the list builder, but here are some that you might use.

| Field                | What This Is                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Response Type        | Required: The assignee needs to take action, for example to approve or reject.<br><br>FYI: The assignee doesn't need to take action.                                                                                                                                                                                                                                                                                                                          |
| Number of Levels     | Number of levels required for the task to be completely approved, from the starting participant to the top participant.                                                                                                                                                                                                                                                                                                                                       |
| Starting Participant | The first assignee in the approval chain.                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Top Participant      | The last assignee in the approval chain if the chain goes up that high. Approvals don't go beyond this participant, for example in the supervisory hierarchy.                                                                                                                                                                                                                                                                                                 |
| Auto Action Enabled  | If set to True, there's an automatic action that is taken on the task when the rule conditions are met.                                                                                                                                                                                                                                                                                                                                                       |
| Auto Action          | "APPROVE": The task is automatically approved.<br><br>"REJECT": The task is automatically rejected.                                                                                                                                                                                                                                                                                                                                                           |
| Rule Name            | The name of the rule with the Then section that you want to use. <ul style="list-style-type: none"> <li>○ Leave the field with the name of the rule you're working on, to indicate that this rule will use the Then section defined here for this rule.</li> <li>○ Or, you can enter the name of an existing rule from any task, enclosed with quotation marks, and leave all the other fields in this Then section blank. The Then section in the</li> </ul> |

| Field | What This Is                                                                                                                  |
|-------|-------------------------------------------------------------------------------------------------------------------------------|
|       | rule you entered would apply to this rule you're working on. So basically, you're reusing the Then section from another rule. |

To select the starting or top participant:

- a. Click the **Starting Participant** or **Top Participant** icon.
- b. In the Add Hierarchy Participant dialog box, select the **Get User** option for a particular user, or **Get Manager** for an attribute, such as the task creator.
- c. For the Get Manager option only, select the list builder that's used for the rule.
- d. For the Get User option, enter in the **Reference User** field the user ID that the user signs in with, enclosed in quotation marks, for example "KLEE".

For the Get Manager option, here's what you do for the **Reference User** field:

- i. Click the **Expression Builder** icon.
- i. In the Variables tab of the Expression Builder, select the attribute you want in the hierarchy. For example, expand Task > payload and find your attribute there.
- ii. Click the **Insert Into Expression** button.
- iii. Click **OK**.
- e. Leave the **Effective Date** field blank to use the latest hierarchy, for example supervisory hierarchy.
- f. Click **OK**.

What shows up in the **Starting Participant** or **Top Participant** field reflects what you have in the Add Hierarchy Participant dialog box. Here are a couple of examples.

- o `HierarchyBuilder.getManager("supervisory",Task.payload.Owner User Name,-1,"","")`

| Part of the Participant Value             | What This Means                                                                                                                                            |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <code>getManager</code>                   | You selected the Get Manager option.                                                                                                                       |
| <code>"supervisory"</code>                | You selected the Supervisory list builder.                                                                                                                 |
| <code>Task.payload.Owner User Name</code> | For the <b>Reference User</b> field, you went to Task > payload > Owner User Name in the Variables tab to select the Owner User Name attribute.            |
| <code>-1</code>                           | This is the default value, which corresponds to the primary employment assignment. That supervisory hierarchy will be used to find assignees for the task. |
| <code>"", ""</code>                       | You left the <b>Hierarchy Type</b> and <b>Effective Date</b> fields blank, so there's nothing between the quotation marks.                                 |

o `HierarchyBuilder.getPrincipal("KLEE","", "")`

| Part of the Participant Value | What This Means                                                                                                            |
|-------------------------------|----------------------------------------------------------------------------------------------------------------------------|
| <code>getPrincipal</code>     | You selected the Get User option.                                                                                          |
| <code>"KLEE"</code>           | For the <b>Reference User</b> field, you entered "KLEE".                                                                   |
| <code>"" , ""</code>          | You left the <b>Hierarchy Type</b> and <b>Effective Date</b> fields blank, so there's nothing between the quotation marks. |

## Example of a Rule

Let's take a look at an example of a rule. In the If section, we have two tests, the first checking if an attribute is a specific value, the second checking if an attribute is more than a certain amount. The attribute names reflect where the attribute is in the hierarchy you get in the Condition Browser dialog box. The **and** connecting the two tests means that both conditions must be met.

IF

Expense Report.Expense Report Total more than 1000 and

Task.payload.Employee InActive

is"N"

In the Then section, there's the action that applies if the conditions are met, and it's defined based on a Supervisory list builder. Assignees must take action, and only one approval is needed.

**THEN**

**List Builder**
Supervisory

**Response Type**
☒ Required
☐ FYI

**Number of levels**

**Starting Participant**

☐
**Top Participant**

**Auto Action Enabled**

**Auto Action**

**Rule Name**
- 2. In the **Tasks to be configured** toolbar, click the **Commit task** icon when you're ready to roll out your changes.

### Related Topics

- [Search for Workflow Tasks to Configure](#)
- [Overview of Flexfields](#)
- [Define Fields](#)
- [Assignments](#)

ORACLE

620



## Disable or Enable Workflow Notifications

If you have BPM Workflow System Admin Role (BPMWorkflowAdmin), you can disable or enable email and in-app notifications for all users. For example, disable when testing changes to approval rules, to avoid sending test notifications. When done testing, reenable notifications.

When workflow tasks are assigned to users, they can get email notifications, as well as in-app notifications from a few places:

- The Things to Finish section on the home page.
- The notifications list in the global header.
- The Notifications page, which users can open from either of the first two places to see all their in-app notifications.

Here are things to know about disabling workflow notifications:

- You disable only email notifications that are sent as part of workflow tasks, not all emails in general.
- Users can still find their workflow tasks in the Worklist: Notifications and Approvals work area.

**Note:** If the Approvals work area is enabled, it replaces the Worklist: Notifications and Approvals work area.

## Set the Notification Mode

Here's how you disable or enable workflow notifications:

1. Click the **Notifications** icon in the global header.
2. Click **Show All**.
3. On the Notifications page, click the **Worklist** button.
4. In BPM Worklist, click your user name and select **Administration**.
5. On the Administration tab, open the Application Preferences page and go to the Notification section.
6. Select a value from the **Notification Mode** list:
  - All: This is the default value.
    - Email notifications are enabled.
    - Workflow notifications are included in the global header, home page, and Notifications page.
  - None:
    - Email notifications are disabled.
    - Workflow notifications aren't included in the global header, home page, and Notifications page.
  - Email:
    - Email notifications are enabled.
    - New workflow notifications won't appear in the global header, home page, and Notifications page.
  - In-app:
    - Email notifications are no longer sent.
    - Workflow notifications in the global header, home page, and Notifications page are enabled.
7. Click **Save**.

### Related Topics

- [More Setup for Workflow Email Notifications](#)
- [Send Test Workflow Email Notifications to One Address](#)
- [View and Act On Notifications](#)

## Define When to Automatically Dismiss or Withdraw Workflow Tasks

For a workflow task to be purged and removed from users' worklists, it must have a final status, like Completed or Withdrawn. FYI tasks must be dismissed. You can control when FYI tasks are eligible to be automatically dismissed.

Tasks go from the Assigned status to the Completed status when the final assignee approves or rejects the tasks. For your information (FYI) tasks get a final status when assignees explicitly dismiss the tasks. If assignees don't do anything within a certain period of time that result in a final task status, the tasks are automatically dismissed (FYI tasks) or withdrawn (all other tasks).

### When FYI Tasks Are Eligible to Be Automatically Dismissed

The **FYI Notifications Expiration Period** (FND\_NOTIFICATION\_EXP\_PERIOD) profile option controls when FYI tasks are eligible to be automatically dismissed.

1. In the Setup and Maintenance work area, go to the **Manage Applications Core Administrator Profile Values** task in the Application Extensions functional area.
2. On the Manage Applications Core Administrator Profile Values page, leave the profile option with the default value of **7** at the Site level, or replace it with a different number.

The profile value represents the number of days after the FYI task is created. When assignees don't read or dismiss an FYI task within this many days after the task was created, the task is then eligible to get automatically dismissed.

### When All Other Tasks Are Eligible to Be Automatically Withdrawn

All other tasks (the ones that aren't FYI) are eligible to be automatically withdrawn if both of these things happen:

- The expiration settings for the particular task is set to **Do Nothing** on the Deadlines subtab, within the Task Configuration tab in BPM Worklist.
- Assignees don't take action to send the task to a final status within 180 days after the task was created. This number is reflected in the **Open Tasks Withdrawn After Number of Days** field on the Application Preferences page, which you can open by clicking the Administration tab in BPM Worklist.

### When Eligible Tasks Are Automatically Dismissed or Withdrawn

Now we know when tasks are eligible, but when are they actually dismissed or withdrawn automatically?

- FYI tasks: A process runs every three days, starting the first day of each month. For example, it runs on May 1, 4, 7, and so on, and again on June 1 and every three days after. So, if you leave the FYI Notifications Expiration Period profile value at 7, depending on when the process runs, an FYI task can be automatically dismissed within seven to ten days after it's created. The process changes the task status from Assigned to Completed.

- All other tasks: A process runs every three days, starting the second day of each month. For example, it runs on May 2, 5, 8, and so on, and again on June 2 and every three days after. The process changes the task status to Withdrawn.

#### Related Topics

- [Set Profile Option Values](#)
- [How do I update existing setup data?](#)
- [Define the Due Date and Expiration Policies for Workflow Tasks](#)

## Synchronize Notifications in the Global Header and Home Page with Workflow Tasks

Users can get in-app notifications for the same workflow task in various UIs, as well as email notifications. The **Synchronize Notifications in Global Header** scheduled process ensures that all the in-app notification UIs reflect the latest task status.

When workflow tasks are assigned to users, they can get an email as well as a notification in the global header and in the Things to Finish section on the home page. Updates they make to tasks from the global header, for example approving them, are automatically reflected in the Things to Finish section. Same goes the other way around, too.

But, the notifications don't immediately reflect changes to the task status if users take action through email, the Worklist: Notifications and Approvals work area, or BPM Worklist. For example, after you approve a task from email, you can still see the notification in the global header and home page asking for approval. Another case like that's when a task is assigned to an approval group, and everyone in the group gets a notification. Say you approve that task from the Things to Finish section. Your notification is removed from that section and the notifications list in the global header, but the same notification is still there for everyone else in the approval group.

**Note:** If the Approvals work area is enabled, it replaces the Worklist: Notifications and Approvals work area.

So, use the **Synchronize Notifications in Global Header** scheduled process to synchronize notifications with the latest task status for all users:

- This affects the notifications list in the global header, the Things to Finish section, and the Notifications page that shows all notifications, not just what's pending for the user.
- The process includes notifications not just for tasks that require action, but also ones that are just FYI.
- The process doesn't update the title of notifications in the global header, home page, or Notifications page. Like email subjects, the notification titles are static.

**Note:** No matter what the task status is, the scheduled process also removes notifications that are older than 30 days from the notifications list, Things to Finish section, and Notifications page.

Even when notifications aren't in sync with the latest workflow task status, users can still find the latest task status in the Worklist: Notifications and Approvals work area.

**Note:** If the Approvals work area is enabled, it replaces the Worklist: Notifications and Approvals work area.

## Schedule the Process

In the Scheduled Processes work area, submit the Synchronize Notifications in Global Header process to run on a schedule. It's recommended that you schedule the process to run every two hours. How often you should run the process depends on the volume of approvals. For example, there might be more during month-end or year-end activities. But if you do need to run the process more frequently, don't schedule it to run more often than every 30 minutes.

How long the process takes to run also depends on the volume of approvals. If you're running the process for the first time, or it hasn't run in a very long time, then the process might take hours to finish.

You need to have the Manage Scheduled Job Definition (FND\_MANAGE\_SCHEDULED\_JOB\_DEFINITION\_PRIV) privilege to run this process. Your security administrator can assign a custom job role with this privilege.

## What Happens After Synchronization

One key thing that affects what users see in the notifications list, Things to Finish section, or Notifications page is whether the workflow task is pending for the user. Here's an example of what happens before and after the scheduled process runs:

1. A notification is pending a user's approval.
2. The user approves the task from email. The task status changes, but the notification requesting approval is still in the global header and Things to Finish section.
3. After synchronization, because the task status is Completed and the task is no longer pending for the user, here's what happens to the notification:
  - It's removed from the list in the global header.
  - It's no longer a card in the Things to Finish section.
  - On the Notifications page, it moves from the Assigned to Me tab to the All tab.

### Related Topics

- [Submit Scheduled Processes and Process Sets](#)

## How Workflow Tasks Are Archived and Purged

Workflow tasks with a final status of Completed, Errored, Expired, or Withdrawn can be archived and purged. In progress tasks with statuses like Assigned, Information Requested, or Suspended aren't eligible.

- Archiving keeps a copy of the task data for audit, data retention or analysis, and other purposes. Archived data includes task details, approval history, comments, and attachments. How you view or use the archived data depends on the products you're using. For example, the data might be displayed in a table on a page, or available through a business intelligence subject area that you can select to create an analysis.

These are the database tables that store the archived data:

- FND\_BPM\_TASK\_B
- FND\_BPM\_TASK\_TL
- FND\_BPM\_TASK\_HISTORY\_B

- FND\_BPM\_TASK\_HISTORY\_TL
  - FND\_BPM\_TASK\_ASSIGNEE
  - FND\_BPM\_TASK\_COMMENT
  - FND\_BPM\_TASK\_ATTACHMENT
- Purging removes the completed tasks from users' worklists and permanently deletes the original data.

## Archive

Tasks are automatically archived once a day without you having to set anything up. You can't change or stop this automatic archive, which includes all eligible tasks that aren't archived yet. These scheduled processes run in this order to get the daily archive done:

- Extract Workflow Tasks for Archive
- Process Translations for Workflow Tasks Archive
- Upload Workflow Task Attachments for Archive

All three scheduled processes must complete for tasks to get archived. But, as soon as **Extract Workflow Tasks for Archive** is done, the tasks are available for purge. It usually takes around two hours for each automatic process to finish.

Though unlikely, if you ever need to archive more frequently, you can use the Scheduled Processes work area to manually run these processes. But it's best not to unless it's really necessary. In which case, keep these in mind:

- Run the processes in the same order that they're run for the automatic archive.
- Don't run these processes when any of the three processes are still running, including the automatic runs.
- Run the processes during off hours, but not at midnight when the purge is running.
- Optionally set parameters for the **Extract Workflow Tasks for Archive** process. Let's say you select 50000 for the Number of Tasks in Batch parameter and 120 for the Maximum Runtime in Minutes parameter. That means the process will archive in batches of 50000 workflow tasks. If it's still running after two hours, the process finishes archiving the current batch and then stops. You can check the log file of the process to see how many tasks are included in the archive.

If the automatic archive isn't working, don't manually run the processes to compensate. Instead, contact your help desk to ensure that the automatic archive works again.

## Purge

Archived tasks that were last updated over 30 days ago are purged without you doing any setup. The purge runs daily at midnight. You can't change or stop this automatic purge.

After a task is purged, users can no longer find it in BPM Worklist or the Worklist: Notifications and Approvals work area. The task's approval history won't be available either. But, the tasks are still in the archive tables and available in analytics or anything else that reflects the archived data.

**Note:** If the Approvals work area is enabled, it replaces the Worklist: Notifications and Approvals work area.

*Related Topics*

- [Submit Scheduled Processes and Process Sets](#)
- [View Status and Other Details for Scheduled Processes](#)
- [Oracle Fusion Cloud Applications Tables and Views for Common Features](#)

## Roles for Workflow Administration Access

Predefined roles provide access to workflow administration functionality. Users with the workflow roles can perform tasks such as setting up approval rules and managing submitted approval tasks.

This table identifies the predefined Oracle Business Process Management (BPM) role for sales workflow administration access, and the predefined job roles that inherit it. It also shows the BPM role that provides workflow administration access for all product families. You can assign a predefined BPM role to a custom job role, if required.

| Product Family | Role Name and Code                                                                     | Inherited by Job Role                                                                                                                                                                                                               |
|----------------|----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sales          | BPM Workflow Customer Relationship Management Administrator<br><br>BPMWorkflowCRMAdmin | Corporate Marketing Manager<br><br>Customer Relationship Management Application Administrator<br><br>Marketing Analyst<br><br>Marketing Manager<br><br>Marketing Operations Manager<br><br>Marketing VP<br><br>Sales Lead Qualifier |
| All            | BPM Workflow All Domains Administrator Role<br><br>BPMWorkflowAllDomainsAdmin          | This role isn't assigned to any predefined job role, but you can add it to custom job roles.                                                                                                                                        |

## Search for Workflow Tasks to Configure

Some workflow setup applies to all tasks, but most of the time you configure specific tasks. To work on a specific workflow task in BPM Worklist, you first run a search and then select the task from the search results.

1. In the Setup and Maintenance work area, go to the **Manage Task Configurations** task in the Application Extensions functional area. Or, depending on your offering, you might use a different functional area or another approval setup task.
2. In BPM Worklist, on the Task Configuration tab, run a search in the **Tasks to be configured** pane.
3. If you don't get any results, or the ones you want, change your search term and try again.

Here are some things to know about the search:

- This searches against various attributes, for example the task title (the one on the General subtab that appears on the Task Configuration tab after you select a task from the search results), application name, and category. But, the search doesn't match against the task name you see in the search results.
- The search is case-sensitive.
- Search by \* if you want all tasks in the search results.
- Only default tasks are included in the search results. You can click **Show** and select the **Active Versions** check box to get both default and active tasks.

#### *Related Topics*

- [How do I update existing setup data?](#)





# 19 Products

## Overview of Sales Products

Create and edit products in your sales application and then use these products in your sales catalog. The sales catalog is the source for product groups and products in leads, opportunities, contracts, and service requests.

Revenue entered for products (and product groups) drives metrics for sales forecasting and salesperson quota.

### Sales Products Tasks

As the sales administrator, here are your typical sales products tasks:

- Create products, view products, and edit products and have them automatically updated in the back-end product model.
- Price "standalone" products directly in price books or in the Edit Product page.
- Add images and attachments to products
- Add products to your sales catalog
- Mark products as usable in service requests and customer self-service applications
- Import products and create and update products using Import Management
- Create and update products using REST or SOAP web services

For more information about importing products, see the *Implementing Sales* guide. For more information about REST and SOAP web services support for products, see the REST API and SOAP web services guides available on Oracle Help Center.

### Integration with Other Applications

You can integrate sales products with other applications to provide additional functionality. Here's an overview of sales products integrations with other applications:

| Functionality                                                        | Integrating Application                    | Where to Find More Information                                                                                                                                                                                                            |
|----------------------------------------------------------------------|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sales product changes are automatically updated in the product model | Oracle Supply Chain Management (SCM) Cloud | <ul style="list-style-type: none"><li>• Oracle SCM Cloud Implementing Product Management guide</li><li>• Oracle SCM Cloud Using Product Master Data Management guide</li><li>• Products chapter in the Implementing Sales guide</li></ul> |
| Use products in the sales catalog                                    | Sales Catalog                              | <ul style="list-style-type: none"><li>• Sales Catalogs chapter in this guide</li><li>• Opportunity Products and Revenue chapter in the Using Sales guide</li></ul>                                                                        |
| Use products in leads                                                | Leads                                      | <ul style="list-style-type: none"><li>• Leads chapter in this guide</li></ul>                                                                                                                                                             |

| Functionality                                                                   | Integrating Application                                                                                                                                              | Where to Find More Information                                                                                                                                                   |
|---------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                 |                                                                                                                                                                      | <ul style="list-style-type: none"><li>Leads chapter in the Using Sales guide</li></ul>                                                                                           |
| Use products in opportunities                                                   | Opportunities                                                                                                                                                        | <ul style="list-style-type: none"><li>Opportunity Products and Revenue chapter in this guide</li><li>Opportunity Products and Revenue chapter in the Using Sales guide</li></ul> |
| Use products in service requests and mark them as customer self-service enabled | <ul style="list-style-type: none"><li>Oracle Fusion Service</li><li>Oracle Digital Customer Service</li><li>Third-party customer self-service applications</li></ul> | <ul style="list-style-type: none"><li>Implementing Fusion Service guide</li><li>Using Fusion Service guide</li></ul>                                                             |

#### Related Topics

- [Download the Macros for Importing Products and Product Groups](#)
- [Import Your Product Data](#)
- [Overview of Opportunity Products and Revenue](#)

## Setup Tasks

### Sales Products High-Level Setup Steps

Set up sales products so that you can use them in your sales catalog. The setup involves a number of implementation steps.

Use the additional topics in this chapter and in other guides to understand all of the setup steps.

#### Setup Steps for Sales Products

Here are the high-level steps to set up sales products:

| Step                                                                                                                                                                                                                                                                                                                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                         | Where to Find More Information                                                                                 |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------|
| Ensure the setup prerequisites: <ul style="list-style-type: none"><li>1. Set up units of measure (UOMs)</li><li>2. Create a location</li><li>3. Create an item master organization</li><li>4. Identify the Item Master Organization as the source of import data</li><li>5. Specify the item master for sales products</li></ul> | <ol style="list-style-type: none"><li>1. UOMs: UOMs are standard definitions for product measurements; therefore, you must set up UOMs.</li><li>2. Location: You must create a location for your organization location is required for creating another prerequisite for products: the item master organization.</li><li>3. Item Master: The item master organization contains definitions of items that you can use across one or more item and inventory organizations.</li></ol> | See the <a href="#">Overview of Sales Catalog Setup</a> topic in the <a href="#">Implementing Sales</a> guide. |

| Step                                                                                                                                                                                                                          | Description                                                                                                                                                                                                                                                                                                                                                                                        | Where to Find More Information                                                                                                                                                                                                                                            |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p><b>Note:</b> We highly recommend you use the Setup Assistant to set up your catalog. The Sales Assistant creates the root product group for you and performs other steps that you would otherwise need to do manually.</p> | <ol style="list-style-type: none"> <li>4. Import Data Source: If you're importing products, you must specify the item organization as the default source of the import data using the Manage Spoke Systems task.</li> <li>5. Item master for Sales: You must set the Sales Products Item Organization profile option to the item master organization the sales products are defined in.</li> </ol> |                                                                                                                                                                                                                                                                           |
| Add products to the application                                                                                                                                                                                               | Use the <b>Sales &gt; Products</b> UI to create and edit the products you sell. Or, use the import macros to import products.                                                                                                                                                                                                                                                                      | <p>See:</p> <ul style="list-style-type: none"> <li>The <i>Create Products</i> topic in this chapter</li> <li>For import information, see the <i>Download the Macros for Importing Products and Product Groups</i> topic in the <i>Implementing Sales</i> guide</li> </ul> |
| Set attributes for products you plan to sell                                                                                                                                                                                  | <p>Set these attributes according to your business needs:</p> <ul style="list-style-type: none"> <li>Eligible to Sell</li> <li>Eligible for Service</li> <li>Enable Customer Self-Service</li> </ul>                                                                                                                                                                                               | <p>The topic in this chapter, <i>Product Attributes You Must Set</i></p> <p>Also see the <i>Implementing Fusion Service</i> guide, if you plan to integrate with Oracle Fusion Service</p>                                                                                |
| Add products to the sales catalog                                                                                                                                                                                             | Add your sales products to the sales catalog hierarchy in order to make them available in opportunities, leads, and contracts.                                                                                                                                                                                                                                                                     | The topic, <i>Add Products to the Catalog</i> , in the Sales Catalog chapter of this guide                                                                                                                                                                                |
| Run the required scheduled process                                                                                                                                                                                            | Run the Import Sales Products scheduled process anytime you update or create products in the SCM Cloud Product Model.                                                                                                                                                                                                                                                                              | The topic in this chapter, <i>Import Sales Products Process</i>                                                                                                                                                                                                           |
| Build the search keyword index                                                                                                                                                                                                | Build the item keyword index so that imported products are available in the browse catalog view.                                                                                                                                                                                                                                                                                                   | The <i>Build the Item Keyword Index</i> topic in this chapter                                                                                                                                                                                                             |
| Enhance product display with attachments and images                                                                                                                                                                           | Optionally, enhance the look and feel of your products in the catalog with attachments and images.                                                                                                                                                                                                                                                                                                 | <ul style="list-style-type: none"> <li>The topic in this chapter, <i>Add Attachments, URLs, and Images</i></li> <li>The topic, <i>Edit Product Details</i>, in this chapter</li> </ul>                                                                                    |
| Set up eligibility rules for products                                                                                                                                                                                         | Optionally, implement eligibility rules that enable salespeople to check product eligibility in opportunities.                                                                                                                                                                                                                                                                                     | The topic, <i>Set Up Product Eligibility</i> , in this chapter                                                                                                                                                                                                            |
| Modify the list of values for the Product Type lookup type                                                                                                                                                                    | Optionally, modify the list of product types that display in the sales UI.                                                                                                                                                                                                                                                                                                                         | <p>These topics:</p> <ul style="list-style-type: none"> <li><i>Significance of the Sales Product Type Field</i></li> <li>General topics <i>about lookup types</i></li> </ul>                                                                                              |

| Step                                                                                               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Where to Find More Information                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Understand how sales products and the SCM Cloud Product Model fit together                         | <p>When you create or update product information in sales, the product information is automatically updated in the SCM Cloud Product Model.</p> <p>Keep in mind that certain attributes in products are named differently and map to different attributes in the SCM Cloud Product Model. For example, in products, the Number field maps to the Item field the SCM Cloud Items UI. Similarly, the Name field in products maps to the Description field in the SCM Cloud Items UI.</p> | <p>These topics:</p> <ul style="list-style-type: none"> <li>• <a href="#">How Sales Products and SCM Cloud Products Work Together</a></li> <li>• <a href="#">Create Products</a></li> </ul> <p>These guides:</p> <ul style="list-style-type: none"> <li>• <a href="#">Oracle SCM Cloud Implementing Product Management</a></li> <li>• <a href="#">Oracle SCM Cloud Using Product Master Data Management</a></li> </ul> |
| Understand supported item life cycle phases and item classes for sales products                    | <p>Remember that sales products support only:</p> <ul style="list-style-type: none"> <li>• Production life cycle phase</li> <li>• Root item class</li> </ul>                                                                                                                                                                                                                                                                                                                           | <p>These sections in this topic:</p> <ul style="list-style-type: none"> <li>• Sales Products Support a Single Product Life Cycle</li> <li>• Sales Products Use the Supplied Root Item Class</li> </ul> <p>The topic, <a href="#">Set Up Item Lifecycle Phases</a>, in the <a href="#">Oracle SCM Cloud Implementing Product Management</a> guide</p>                                                                   |
| Understand how the sales products business logic interacts with the Oracle SCM Cloud Product Model | Product data follows specific business logic that relates to the Oracle SCM Product Model.                                                                                                                                                                                                                                                                                                                                                                                             | The topic, <a href="#">Sales Products Business Object Logic</a> , in this chapter                                                                                                                                                                                                                                                                                                                                      |
| Display additional details about products using extensible flexfields in the Product Model         | After you set up extensible flexfields and add more details to products, salespeople can browse the catalog and drill down further to view more details about the products. This setup requires a license to Oracle Fusion Product Hub (part of SCM).                                                                                                                                                                                                                                  | The article, <a href="#">Extensible Flexfield Data Configuration for Product Information Management (Doc ID 2091164.1)</a> , available on <a href="#">My Oracle Support</a>                                                                                                                                                                                                                                            |

## Sales Products Support a Single Product Life Cycle

Sales products functionality supports a single product life cycle, called Production. If this default life cycle meets your business requirements, no implementation steps are required around product life cycle.

## Sales Products Use the Supplied Root Item Class

By default, sales products functionality uses the supplied Root item class to classify products. Additional classifications are only available if you license the Product Hub.

## Sales Products Support Custom Inventory Item Status Codes

When setting up products, you can use custom inventory Item Status codes. These codes don't have to be set as Active either. As long as you have the attributes like Eligible to Sell and Eligible to Service enabled, then products with custom inventory Item Status codes show up in your sales applications.

This change applies to these flows:

- A user adds a product to the product catalog
- A user adds a product to a transaction (for example, she adds a product to an opportunity or lead using the standard list of values or by browsing the catalog)
- You add a product to a price book
- Select product using custom product dynamic choice list

To read more about inventory Item Status codes, see the Oracle SCM Cloud Using Product Master Data Management guide.

#### Related Topics

- [What are the available data import options?](#)
- [Item Specifications and Attributes](#)

## Product Attributes You Must Set

When implementing products, set the attributes described here according to your business needs:

| Attribute            | What It Does                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|----------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Eligible to Sell     | <p>The attribute marks a product as available in the consuming sales applications. You enable or disable this attribute in the edit product pages. It can also be updated using web services or Import Management. This attribute interacts with the SCM Cloud item attributes Customer Orders Enabled and Orderable on the Web. Keep in mind the following points about the attribute:</p> <ul style="list-style-type: none"><li>• All sales products must have the check box checked to be visible in consuming sales applications.</li><li>• If the check box is unchecked, then the SCM Cloud item attributes Customer Orders Enabled and Orderable on the Web are set to no.</li><li>• If the check box is checked, then the SCM Cloud item attribute Customer Orders Enabled is set to yes.</li></ul> <p><b>Note:</b><br/>After you create a product using the simplified products UI, you can't delete it. To "hide" products in consuming applications, deselect the Eligible to Sell indicator in the product details screen. You can delete products in the Product Model, and then after you run the scheduled process, Import Sales Products from PIM Data Hub, the products are removed from sales. To understand how to delete products in the Product Model, see the Using Product Master Data Management guide.</p> |
| Eligible for Service | <p>The attribute makes a product available in the service application. You enable or disable this attribute in the edit product pages. It can also be updated using web services or Import Management. This attribute interacts with the SCM Cloud item attribute Service Request. Keep in mind the following points about the attribute:</p> <ul style="list-style-type: none"><li>• All serviceable products must have the check box checked to be visible in the service request application.</li><li>• If the check box is checked in the sales product pages, then the Service Request indicator in SCM Cloud is enabled.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |

| Attribute                        | What It Does                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                  | <ul style="list-style-type: none"><li>If the check box is unchecked after being checked in the sales products pages, then the corresponding SCM Cloud item attribute Service Request is set to null.</li><li>If, in SCM Cloud, the Service Request attribute is disabled, inactive, or null, then the application clears the Eligible for Service check box in the sales products pages.</li></ul>                                        |
| Enable for Customer Self-Service | The attribute makes a product available in consuming self-service customer applications, such as Oracle Digital Customer Service. You enable or disable this attribute in the edit product pages. You can also update it when adding a product to the catalog. Furthermore, it can also be updated using web services or Import Management. This attribute interacts with the SCM Cloud item attribute Enabled for Customer Self-Service. |

## Service and Self-Service Attributes Examples:

Here are some examples of using the service and self-service attributes:

### Example 1

A company that sells electronics has externally-exposed products, such as televisions, appliances, video games, and so on, that are eligible to be serviced. Internally, the company tracks products that go into making these external products, such as cables or peripherals. In this scenario, the company marks all externally-exposed products that can be serviced with Enable Customer Self-Service indicator as yes, while all of the internal products (for example, cables and peripherals) that aren't self-service-enabled, with the indicator as no.

### Example 2

Using a self-service application, a customer requests service on all current models. In this case, these models would be eligible-for-service enabled and customer self-service enabled. However, if the customer wants service on, for example, an older model, then he calls a service agent and the service agent can request service on the old model. In this case, the old model would be eligible-for-service enabled, but customer self-service would be disabled.

## Import Sales Products Process

Run the Import Sales Products from PIM Data Hub scheduled process any time you update or create products in the SCM Cloud Product Model.

You must run this scheduled process so that products you have created (or those you updated) in the Product Model show up in the sales Products UI.

Here are the steps:

1. Sign in as a setup user and navigate to **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog window, click the down-arrow next to the **Name** field and click **Search**.
4. In the Search dialog window, enter `%Sales%Products%`, and click **Search**.
5. Select the **Import Sales Products from PIM Data Hub** process in the results that are returned and click **Ok**.
6. Click **Ok** again, if needed.
7. In the Process Details window, click **Submit**.

## Build the Item Keyword Index

The item keyword index lets Product Model users quickly locate products in the search list of values. For sales applications you must build the item keyword index so that products are available in the browse catalog view in sales applications like opportunities and leads.

Here are high-level steps to build the index. For complete details, see the topic on building the item keyword index in the Oracle SCM Cloud Implementing Product Management guide.

1. In the Setup and Maintenance work area, select the **Manage Item Keyword Search Attributes** task.
  - o Offering: Product Management
  - o Functional Area: Items
  - o Task: Manage Item Keyword Search Attributes
2. Select the attributes that you want to use in the indexing process.
3. Click **Index** from the global header region and choose from these indexing options:
  - o **Create Index:** This action lets you start the indexing process using the current configuration of attributes, organizations, and languages.
  - o **Schedule Indexing:** This action gives you the option of scheduling the indexing process. The indexing is run based on your selections on this page.  
This initiates the indexing process.

### Related Topics

- [Build Item Keyword Index](#)

## Set Up Product Eligibility

Product eligibility lets salespeople check whether products added to opportunities are eligible to sell based on rules that you set up.

For example, you sell software, and government regulations prevent you from selling certain types of software to certain countries.

So you set up rules to keep salespeople from selling these products to customers with locations in these countries. Salespeople can click the **Check Eligibility** button in the opportunity Products table to check whether products are eligible to sell.

### Setup Overview

Perform the steps listed here to enable eligibility in opportunities.

Prerequisite: Before you can implement product eligibility, you must have created a sales catalog and added products to it.

Here are the high-level setup steps:

1. Set up eligibility rules in the catalog.

2. Set the eligibility check to run.
3. Enable the **Check Eligibility** button on the Products table in opportunities.

**Note:** Keep in mind that eligibility functionality is only available for individual products. You can't implement eligibility rules for product groups. Also, eligibility checks can only be performed in opportunities.

## Create Eligibility Rules

You set up eligibility rules in the product group pages in Setup and Maintenance. Here's how:

1. In Setup and Maintenance, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Product Groups
2. In the Manage Product Groups page, select the product group that has the products in it, for which you're setting up eligibility rules.
3. Lock the product group to modify it.
4. Select the product for which you're setting up eligibility rules.
5. Add a row to the Eligibility Rules table.
6. In the Eligibility Rules table, for each rule, set your options:
  - o **Rule Type:** Set the product as available. To disable eligibility for the product set the product as unavailable.
  - o **Country:** Select a country for which the Available and Unavailable actions apply.
  - o **Dates:** Select the dates for the eligibility rule.
7. Click **Publish**.
8. Unlock the product group.
9. Click **Save and Close**.

## Setting Eligibility Check to Run

Set the eligibility check to run using the product group usage pages in Setup and Maintenance:

1. In Setup and Maintenance, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Product Group Usage
2. In the Manage Product Group Usage page, select the **Base** catalog in the upper portion of the page. (If your catalog uses a different usage, then select it.)
3. Click the **Functions** tab in the Details section of the page.
4. For the **Eligibility engine** option, click the **Value** drop-down list and set the value to **Run**.
5. Click **Save and Close**.

## Enable the Check Eligibility Button

Use Application Composer to enable the **Check Eligibility** button on the opportunity Products table:

1. Ensure that you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.



3. In the navigation tree, expand **Standard Objects**.
4. Expand the **Opportunity** object and then click **Pages**.
5. In the Opportunity: Pages page, ensure that the **Application Pages** tab is active.
6. In the Details Page Layouts region, select the **Standard Layout** in the table and then click the **Duplicate** icon. The Duplicate Layout dialog box appears.  
  
Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.
7. Enter a name for the new layout and click **Save and Edit**.  
You're returned to the edit page for the new layout.
8. In the Edit Revenue Table region, click the edit icon.
9. In the Edit Revenue Table page, find the **Check Eligibility** button in the Buttons and Actions window. Move the field from the Available Buttons window to the Selected Buttons window.
10. Click **Save and Close**.
11. Click **Done**.
12. Validate the change by navigating to the edit opportunity page and ensuring that you can see the **Check Eligibility** button on the Products table.  
  
Note that the user you sign in with to validate the change must belong to a sales resource organization. For example, you must sign in as a sales representative.
13. Publish the sandbox according to your company's process.
14. The **Check Eligibility** button is now available to sales users on the opportunity Products table.

#### Related Topics

- [Overview of Sales Products](#)
- [Sales Products High-Level Setup Steps](#)
- [Sales Catalog High-Level Setup Steps](#)
- [Overview of Sales Catalog Usages](#)
- [Overview of Setting Sales Catalog Options and Actions](#)

## Use Access Groups to Secure Products and Product Groups

Predefined access group rules provide your users with global access to products and product group data, but you can configure this access for different groups of users. Let's say you only want sales managers to be able to update products or product groups.

Let's say you only want sales managers to be able to update products or product groups. You set up an access group with update privileges just for those users.

Here are the high-level steps:

1. Plan out the different access levels needed for your users. For example, determine what access level to give only to your sales managers.
2. Create one or many access groups for the different access levels you want your users to have.
3. Assign resources to each group. For example, assign your sales managers to a new "product groups" group.
4. For each group, create object sharing rules to specify the access levels.
5. Publish the rules and run a scheduled process to apply the access to group members.

For complete steps, see the related topics.

#### *Related Topics*

- [Use Access Groups to Secure Product, Product Group, and Price Book Data](#)
- [Considerations in Deciding When to Use Access Groups](#)

## Work with Sales Products

### Overview of Working with Sales Products

This section covers how to:

- View sales products: This task includes basic and advanced search and creating saved searches.
- Create products: This task includes entering product basic information.
- Edit products: This task includes modifying some product basic information (including setting sellable and serviceable attributes) and adding or editing attachments, URLs, and images.
- Configure default pricing: See [Set Default Price Book and Get Prices](#)

#### *Related Topics*

- [Add Products to the Catalog](#)

### View the Product List

To view your product list, sign in as the sales administrator and navigate to Sales Products . The default saved search is for products updated by you in the last week.

In the overview page, you can:

- Search for products using the **Find** text box. For more information, see the topics on using search in the applications.
- View products updated by you in the last week. Keep in mind that if you haven't updated any products in the past week, then the list will be blank.
- Use advanced search to modify and execute the supplied saved search.
- Create additional saved searches.
- Access product details.

#### *Related Topics*

- [Add Products to the Catalog](#)

## Create Products

When you create a product, you enter product basic information and save the product for the first time.

Keep in mind that:

- After you create a product using the sales products UI, you can't delete it. But you can hide it in the UI by deselecting the **Eligible to Sell** option in the product details screen.
- The fields in the sales products UI don't map name-for-name to the SCM application; see the table in this topic for more details.

Here's how to create a new sales product:

1. Navigate to **Sales > Products**.
2. In the Products overview page click **Create Product**.
3. In the Create Product page, fill out the fields.

This table shows the fields, their descriptions, and the table columns in SCM products that they map to:

**Note:** To speed up product creation, import your products and product groups. See the [Download the Macros for Importing Products and Product Groups](#) topic in the *Implementing Sales* guide for more information.

| Field              | Description                                                                                                                                        | SCM Products Table Column Mapping |
|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| Product Number     | Enter a unique product number. You can't edit this field after you save the product.                                                               | Item                              |
| Name               | Enter the name of the product whose number you entered.                                                                                            | Description                       |
| Description        | Enter a description for the product.                                                                                                               | Long Description                  |
| Sales Product Type | Further categorize the product by selecting a product type. See <a href="#">Significance of the Sales Product Type Field</a> for more information. | Sales Product Type                |
| Default UOM        | Select the default UOM for the product. You can't edit this field after you save the product.                                                      | Primary Unit of Measure           |
| Eligible to Sell   | Check this box to make the product available in the consuming Sales applications.                                                                  | Customer Orders Enabled           |

| Field                        | Description                                                                                                                                                                                                                         | SCM Products Table Column Mapping |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| Eligible for Service         | Optionally, if integrating with the Service Request application, enable this option. Only products with this option set can be used in the service request application.                                                             | Service Request                   |
| Enable Customer Self-Service | Optionally, if integrating with Oracle Digital Customer Service or another third-party customer self-service application, enable this option. Only products with this option set can be used in customer self-service applications. | Enable Customer Self-Service      |

#### 4. Save your changes.

#### Related Topics

- [Add Products to the Catalog](#)

## Edit Product Details

When you edit products, you might do such things as:

- Modify basic information
- Add product information, such as attachments, URLs, and images

To edit product details:

1. Navigate to **Sales > Products**.
2. Select a product from the list. The table shows the editable fields, their descriptions, and the table columns in SCM products that they map to.

| Field              | Description                                                                                                                               | SCM Products Table Column Mapping |
|--------------------|-------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| Name               | Enter the name of the product whose number you entered.                                                                                   | Description                       |
| Description        | Enter a description for the product.                                                                                                      | Long Description                  |
| Sales Product Type | Further categorize the product by selecting a product type. See <i>Significance of the Sales Product Type Field</i> for more information. | Sales Product Type                |

| Field                        | Description                                                                                                                                                                                                                         | SCM Products Table Column Mapping |
|------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------|
| Eligible to Sell             | Check this box to make the product available in the consumingSales applications.                                                                                                                                                    | Customer Orders Enabled           |
| Eligible for Service         | Optionally, if integrating with the Service Request application, enable this option. Only products with this option set can be used in the service request application.                                                             | Service Request                   |
| Enable Customer Self-Service | Optionally, if integrating with Oracle Digital Customer Service or another third-party customer self-service application, enable this option. Only products with this option set can be used in customer self-service applications. | Enable Customer Self-Service      |

3. Attachments: Add or remove attachments or URLs as needed. Multiple attachments or URLs can be associated with a product.
4. Images: Add or remove images as needed. Only one image can be associated with a product. All files types supported by Oracle WebCenter Content are supported.
5. When done editing, save your changes.

#### Related Topics

- [Add Products to the Catalog](#)

## Add Attachments, URLs, and Images

You can associate both attachments (which can be files or URLs) and images with products. But keep in mind:

- The application supports all file types that are supported by the content storage application, Oracle WebCenter Content.
- You can only associate one image with a product.
- You can associate multiple attachments (files) or URLs with a product.

## Configure Default Pricing

You can configure default pricing for products in the sales Products pages.

**Note:** You can configure pricing for "standalone" products. Standalone products are products that have no association with a product group in the sales catalog. This means you can set prices for products independent of the catalog hierarchy.

Here are the high-level steps to configure default prices for products:

- Enable the Default Pricing region in the Edit Product page, using the steps in the section, Enable the Default Pricing Region, in this topic.
- Configure the pricing. Use the steps in the section, Configure Default Pricing, in this topic.

## Enable the Default Pricing Region

After you enable it using Application Composer, the Default Pricing region shows up in the Edit Product page. Here are the steps:

1. Ensure you're working in an active sandbox.
2. Navigate to **Configuration > Application Composer**.
3. Under Standard Objects, navigate to **Product > Pages**.
4. Go to the Details Page Layouts section and duplicate the standard layout. Name and then edit the resulting layout.
5. In the Details Layout page, click **Show** in the Edit Default Pricing region.
6. Click **Done**.
7. Now, test the change:
  - a. Click the **Home** icon in the global header.
  - b. Navigate to **Sales > Products**.
  - c. Edit a product.
  - d. Verify that you can see the Default Pricing region on the page.
8. After you have verified the change, publish the sandbox according to your company's business practices.

## Configure Default Pricing

Now that you have the Edit Default Pricing region ready to go, search for and edit the product you want to configure pricing for.

**Note:** As a prerequisite, the product must be created and be in a price book. See the Price Books chapter in this guide for more information. The product doesn't need to be part of a product group or product group hierarchy.

Configure the default pricing:

1. In the Default Pricing region of the Edit Product page, click the **Add** button.
2. Enter the currency, UOM, and list price of the product.
  - Currency: This list of values is based on the same fixed choice list as in the price book header.
  - Name: This field shows the name of the default price book for the selected currency, for your reference.
  - UOM: This list of values is based the same fixed choice list as in the price book line.
  - List Price: This field is the same type of field as in the price book line.
3. Save your work.

Add the product to a published product group to complete the setup and display the product to users in the sales catalog.

## Important Considerations for the Default Pricing Region

Keep these considerations in mind as you implement and use the Default Pricing region:

- You can't extend the region. For example, you can't add or remove columns on the table.
- The application doesn't support custom price book and price book line attributes.
- You can only maintain default prices for the product you're editing. However, you can maintain other, additional prices for the product using the Edit Price Book UI or using REST services or import management.
- The region table displays all prices for the product you're editing, from all active default price books.
- If you have added a default price and the corresponding price book becomes inactive or is no longer marked as the default, these prices are no longer displayed in the new region.
- The list of available values in the Currency list is the unique list of currencies from all active, default price books.
- The combination of Currency and UOM must be unique in the table. In other words, you're not able to save multiple rows for the same combination of currency and UOM, for the product you're editing.

## Set Up Validation of Product Configurable Models

### Validate That Configurable Models Are Entered Correctly

In the sales Products UI, you can set up the UI so that it validates that configurable product model information is entered correctly. Model information in products and product groups includes the collection of model, model line model family, and model attribute values. These values are required to identify Oracle Configure, Price, and Quote (Oracle CPQ) configuration models. This validation enforces consistent entry of model information when managing products and product groups.

This feature lets you validate and enforce consistent entry of model information required to identify Oracle CPQ configuration models for the Oracle CPQ integration purposes.

Keep these points in mind as you set up and use this feature:

- This feature is primarily useful for customers using the Oracle CPQ integration.
- The validation is enforced to ensure entry of Model, Model Line, and Model Family field values when the Configurable field is set to Yes as a user creates or edits a product.
- The validation is enforced to ensure entry of Model Line and Model Family field values when the Model field value is specified as a user edits a product group.
- The entry of model attributes is optional.
- You can also use this feature in REST APIs and in Import Management.

Here are some additional steps to consider to enable this validation feature for Product and Product Groups.

- Users must set the **Configurable** indicator to **Yes** to enforce model information entry validation in the Products UI.
- As an additional configuration, you can set the **Default Operator** to **Is blank** for the **Configurable** field in the Search Region configuration page under Search and Select Dialog Layouts (**Application Composer > Product > Pages**). This configuration lets users search pre-existing product records that have a blank Configurable field value without having to specify the Configurable condition explicitly.

- Users must specify the Model value to enforce model information entry validation in the Product Group edit UI.

For procedures, see:

- [UI Setup for Validating Product Configurable Models](#)
- [UI Setup for Validating Product Group Configurable Models](#)

**Note:** This feature is primarily useful for customers using the Oracle CPQ integration. For more information about how to enable the integration, see the Integrating Oracle CX Sales with Oracle CPQ guide.

## UI Setup for Validating Product Configurable Models

To enable validation of model information entry for Product, adjust the page layout and expose fields for the Product object using Application Composer:

The validation is enforced to ensure entry of Model, Model Line, Model Family, and Model Attributes field values when the **Configurable** field is set to **Yes** as a user creates or edits a product.

1. Sign in as a user with the Sales Administrator job role.
2. Ensure you're working in an active sandbox.
3. Navigate to **Configuration > Application Composer**.
4. Navigate to the **Product** object and click **Pages**.
5. Navigate to the **Details Page Layouts** region and duplicate the standard layout to create a new, custom layout.

**Note:** To expose model information fields in the Create Product page, use the Creation Page Layouts region in Application Composer.

6. Edit the new layout.
7. In the Details Layout region, click the edit icon in the Edit Subtab: Summary region.
8. In the Configure Detail Form page, move the Configurable, Model, Model Line, Model Family, and Model Attributes fields to the Selected Fields area in the given order.

**Note:** You must expose all five fields in the given order, for example: Configurable, Model, Model Line, Model Family, and Model Attributes.

9. Save your work.
10. Navigate to the Edit Product page in **Sales > Products**. Verify that the Configurable, Model, Model Line, Model Family, and Model Attributes fields appear in the Edit Product page.
11. Publish the sandbox according to your company's business practices.

## UI Setup for Validating Product Group Configurable Models

To enable validation of model information entry for Product Group, adjust the Desktop page layout and expose fields for the Product Group object using Application Composer:

The validation is enforced to ensure entry of Model Line and Model Family field values when the **Model** field value is specified as a user edits a product group.

1. Sign in as a user with the Sales Administrator job role.



2. Ensure you're working in an active sandbox.
3. Navigate to **Configuration > Application Composer**.
4. Navigate to the **Product Group** object and click **Pages > Desktop Pages**.
5. Click **Edit Summary Form** in the Details Page region.
6. In the Edit Details Page Summary Form page, in the Configure Default Summary region, move the Model, Model Line, Model Family, and Model Attributes fields to the Selected Fields area in the given order and save.

**Note:** You must expose all four fields in the given order, for example: Model, Model Line, Model Family, and Model Attributes.

7. Navigate to Setup and Maintenance and Search for the task, Manage Product Groups.
8. Select a product group and click **Lock** to edit the product group. Verify that the Model, Model Line, Model Family, and Model Attributes fields appear in the Product Group page.
9. Unlock the product group.

## Speed Data Entry Using Dynamic Choice Lists

### Increase Efficiency with Product Group Dynamic Choice Lists

Speed administrator tasks by setting up dynamic choice lists for product group data selection within Sales objects like opportunities and leads. After you configure product group dynamic choice lists in Application Composer, Sales Catalog administrators can use them with specific filter criteria. You can also use dynamic choice lists with your own custom objects.

Use the procedure, [Create Product Group Dynamic Choice Lists](#), to create the dynamic choice lists. As you implement this feature, keep in mind:

- Oracle supplies an existing filter named `GetProductGroupsForUsage` to facilitate setup.
- The example filter expression value for **Bind\_usageCode** is `'BASE'`.
- The example filter expression value for **Bind\_UsageModeCode** is `'MOO'` when you define a custom choice list field for Opportunity. This includes any other associated filter functions, such as the territory engine, if defined for Opportunity in the Manage Product Group Usage task.
- If you want a choice list field to display all available product groups, use the filter expression value, `'QSC'` for **Bind\_UsageModeCode**.
- The filter expression value for **Bind\_UsageModeCode** is `'MKL'` when you define a custom choice list field for Lead.
- For example filter expression values to set up for variable **Bind\_UsageModeCode** when you define the custom choice list (dynamic) field for Opportunity, navigate and refer to **Setup and Maintenance > Manage Product Group Usage > Select Usage: Base > Base Details > Modes > Description**.

**Note:** You must include the single apostrophes in the filter expression values when you enter them.

## Create Product Group Dynamic Choice Lists

The product group dynamic choice lists that you set up let catalog administrators filter data when making selections, thus boosting efficiency and performance.

To enable Product Group dynamic choice lists, you first add a dynamic-choice-list type custom field for an object using Application Composer:

1. Ensure you're working in an active sandbox.
2. Navigate to **Configuration > Application Composer**.
3. Navigate to the **Fields** page in Opportunity, Sales Lead, or your own custom object.
4. In the Fields page, create a new, custom field.
5. Select **Choice List (Dynamic)** and click **OK**.
6. Specify basic information in the Create Dynamic Choice List: Basic Information page.
7. Click **Next**.
8. In the Create Dynamic Choice List: List of Values page, select **Product Group** as the related object you want to query to populate the list.
9. For List Selection Display Value, select **Display**.
10. Expand the **Data Filter** region and click **Existing Filter**.
11. For **Data Filter Name**, select **GetProductGroupsForUsage**.
12. For **Bind\_UsageModeCode**, specify the expression value, for example, 'MOO' (for Opportunity).
13. Click **Submit**.
14. Publish the sandbox according to your company's business practices.

## Implementation Concepts

### How Sales Products and SCM Cloud Products Work Together

When you create or update product information in the Sales Products area, the product information is automatically updated in the back-end application, Oracle Supply Chain Management (SCM) Cloud.

This table shows the mapping between sales product attributes and SCM Cloud item attributes:

| Sales Product Attribute | SCM Cloud Products Attribute                      |
|-------------------------|---------------------------------------------------|
| Inventory Item ID       | Item                                              |
| Organization ID         | Organization                                      |
| Number                  | Item (in SCM Cloud Items UI header region)        |
| Name                    | Description (in SCM Cloud Items UI header region) |

| Sales Product Attribute | SCM Cloud Products Attribute                                                                                                                                                                       |
|-------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                         |                                                                                                                                                                                                    |
| Description             | Long Description (in SCM Cloud Items UI Overview tab)                                                                                                                                              |
| Product Type            | Sales Product Type (in SCM Cloud Items UI Specifications tab and Sales and Order Management side navigation region). See <i>Significance of the Sales Product Type Field</i> for more information. |
| Default UOM             | Primary Unit of Measure (in SCM Cloud Items UI Overview tab)                                                                                                                                       |
| Eligible to Sell        | Customer Orders Enabled (in SCM Cloud Items UI Specifications tab and Sales and Order Management side navigation region)                                                                           |
| Eligible for Service    | Service Request (in SCM Cloud Items UI Specifications tab and Service side navigation region)                                                                                                      |
| Attachments             | Attachments tab (in SCM Cloud Items UI)                                                                                                                                                            |
| Image                   | Image (in SCM Cloud Items UI header region)                                                                                                                                                        |

## Sales Products Business Object Logic

Sales product data follows specific business logic, and at times, as an implementor, you may sometimes need to be aware of how the data maps to other applications or objects.

Here's an example of business logic you may want to be aware of:

- When you create a product in the Sales Products UI, or using web services, the Inventory Item ID is null. However, if you create a product using import, the Inventory Item ID is the same as the Inventory Item ID in the Oracle Supply Chain Management (SCM) Cloud product tables.

This table describes the business logic for various business objects when using sales products. In the table "sales product" means a product created in the sales products UI. "Import" refers to Oracle import.

| Sales Products Attribute | Business Logic                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Inventory Item ID        | <ul style="list-style-type: none"><li>Sales product creation through UI or web services: null.</li><li>Sales product creation through import: Same as the Inventory Item ID for the SCM back-end item that's being created as the sales product. The SCM back-end item attribute should match the sales product Number attribute.</li><li>Required when a product is updated.</li></ul> |
| Organization ID          | <ul style="list-style-type: none"><li>Sales product creation through UI or web services: The value for the profile option QSC_SALES_PRODUCTS_INVENTORY_ORG_ID is set as the default.</li><li>Sales product creation through import: Same as the organization ID for the SCM Cloud back-end item that's being created in Sales products screens.</li></ul>                               |

| Sales Products Attribute      | Business Logic                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Item Master Organization      | <ul style="list-style-type: none"> <li>Sales product creation through UI or web services: The value for the profile option QSC_SALES_PRODUCTS_INVENTORY_ORG_ID is set as the default.</li> <li>Sales product creation through import: Same as the organization ID for the SCM Cloud back-end item that's being created in Sales products screens.</li> </ul>                                                                                                                                    |
| Item Class                    | <ul style="list-style-type: none"> <li>Required attribute when creating a new product in the SCM Cloud back-end products application.</li> <li>The value should be <b>Root Item Class</b>.</li> </ul>                                                                                                                                                                                                                                                                                           |
| Template                      | <ul style="list-style-type: none"> <li>Required attribute when creating a new product in the SCM Cloud back-end products application.</li> <li>The value should be <b>Finished Goods</b>.</li> </ul>                                                                                                                                                                                                                                                                                            |
| Number                        | <ul style="list-style-type: none"> <li>Required attribute when creating a new product or updating an existing product.</li> <li>The value must be unique for an item master.</li> <li>Creating a product with an existing number throws an API unique violation error.</li> </ul>                                                                                                                                                                                                               |
| Name                          | <ul style="list-style-type: none"> <li>Required attribute when creating a new product.</li> <li>The value should be passed during product update only if changed.</li> </ul>                                                                                                                                                                                                                                                                                                                    |
| Product Type                  | Sales products retrieves the list of values for Product Type from the lookup type QSC_SALES_PRODUCT_TYPE. See <i>Significance of the Sales Product Type Field</i> for more information.                                                                                                                                                                                                                                                                                                         |
| Default Unit of Measure (UOM) | <ul style="list-style-type: none"> <li>Validated against all UOMs that are effective as of current date.</li> <li>Optional for create operation.</li> <li>Update of UOM isn't allowed for saved products.</li> </ul>                                                                                                                                                                                                                                                                            |
| Eligible to Sell              | <ul style="list-style-type: none"> <li>All Sales products must have this indicator set to yes (checked).</li> <li>For update operation, pass only if changed.</li> <li>When a user sets it to no from yes, the corresponding SCM Cloud item indicators Customer Orders Enabled and Orderable on the Web are set to no.</li> <li>When a user sets it to yes from no, only the corresponding SCM Cloud item indicator Customer Order Enabled is set back to yes.</li> </ul>                       |
| Eligible for Service          | <ul style="list-style-type: none"> <li>All Service products that will be used in the service request management application must have this indicator set to yes (checked).</li> <li>For update operation, pass only if changed.</li> <li>When a user sets it to no from yes, the corresponding SCM Cloud item indicator Service Request is set to Disabled</li> <li>When a user sets it to yes from no, the corresponding SCM Cloud item indicator Service Request is set to Enabled</li> </ul> |
| Image                         | <ul style="list-style-type: none"> <li>Image maps to the SCM Cloud attachment entity ITEM_ENTITY and the category IMAGE.</li> <li>Only one image per product is allowed.</li> <li>Optional for create operation. For update operation, pass only if changed.</li> <li>In the case of errors, API messages are returned.</li> </ul>                                                                                                                                                              |
| Attachments                   | <ul style="list-style-type: none"> <li>A product can have multiple attachments.</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                      |

| Sales Products Attribute | Business Logic                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|--------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                          | <ul style="list-style-type: none"><li>• Only attachments of type "file" are allowed.</li><li>• Product attachments map to the SCM Cloud items attachment entity ITEM_ENTITY.</li><li>• The attachment category can be one of the following:<ul style="list-style-type: none"><li>◦ One of the attachment categories associated with the Root Item Class except IMAGE.</li><li>◦ Null</li></ul></li><li>• Optional during product creation.</li><li>• Attachments can be added, updated, or deleted at any time.</li><li>• In the case of errors, SCM Cloud API messages are returned.</li></ul> |

#### Related Topics

- [Overview of Sales Products](#)
- [Overview of Working with Sales Products](#)
- [Sales Products High-Level Setup Steps](#)
- [How Sales Products and SCM Cloud Products Work Together](#)

## Significance of the Sales Product Type Field

The Sales Product Type field is an important attribute in relation to Sales Products. The value set in this field indicate whether a product can participate in specific CX Sales management processes by default, without customization.

For example, the sales product types, Subscription and Extended Warranty, are meant for products that follow Subscription Management (in other words, the Subscription-Sales management process), whereas One Time Service, Installation, Software Maintenance, and Preventive Maintenance are example Service products and are referred to in the Service Sales Management process.

**Note:** In the create and edit product pages, if the Sales Product Type selected is one of the following, then the Eligible for Service check box is cleared and disabled: Extended Warranty, Included Warranty, Preventive Maintenance, Service Level Agreement, Software Maintenance.

Optionally, you can modify the list of product types that display in the sales UI. Sales products retrieve the list of values for Product Type from the lookup type, QSC\_SALES\_PRODUCT\_TYPE. You can find the lookup type in the Setup and Maintenance task, Manage Standard Lookups.



# 20 Price Books

## Overview of Price Books

Use price books to create product lists with prices that you can then use in other sales applications, such as contracts, accounts, and opportunities.

Some of the ways your organization might use price books include:

- Integrate price books with accounts and opportunities for greater flexibility in pricing. For more information, see the Price Books in Opportunities and Accounts section in this chapter.
- Set default list prices on contract sales agreements. See the topic, Create a Sales Agreement Line, for more information.

## Using Price Books with REST APIs

You can create and update price books using REST APIs. You can avoid certain errors by setting your preferred language to English. See the topic, How to Set the Preferred Language, in the Related Links below.

### *Related Topics*

- [Work with Price Books](#)
- [Overview of Sales Products](#)
- [Overview of Sales Catalogs](#)
- [How to Set the Preferred Language](#)
- [Create a Sales Agreement Line](#)

## Work with Price Books

You use price books to create product lists with prices that you can then use in other sales applications, such as contracts, accounts, and opportunities.

## Create a Price Book

Here's how to create a price book:

1. Navigate to **Sales > Price Books**.
2. In the Price Books page, click **Create Price Book**.
3. In the Create Price Book page, enter the details of the price book.
  - **Name:** Enter a unique name for the price book.
  - **Currency:** Select a currency from the list of implemented currencies. Note that the currency set in your user preferences is initially used as the default currency.

- **Description:** Optionally, enter a description for the price book.
- 4. Click **Save and Continue**. Or, click **Save** to save the price book so you can edit it later.  
The default status for a new price book is Draft.
- 5. In the Edit Price Book page, add products. Click **Add** to add a single product line. Click **Add Many** to add several product lines.
- 6. Search for and select the product or products. Click **OK** in the search page to return to the edit page.
- 7. For each product line, fill in the following fields:
  - **UOM:** Select the unit of measure.
  - **List Price:** Enter a price.
- 8. Save your changes by clicking **Save** or **Save and Close**.
- 9. When you're ready for your price book to become active and ready for use, change the Status to **Active**. After you save a price book in Active status, the name can't be updated.

## Edit a Price Book

You can edit price books, but not all of the fields are editable when they're Active. See the Price Book Statuses section in this topic for more details on which fields are editable in the various statuses.

To edit a price book:

1. Navigate to **Sales > Price Books**.
2. In the Price Books landing page, click the name of a price book.
3. In the Edit Price Book page, edit the price book as needed.

## Copy a Price Book

You may want to copy a price book to save the time needed to create a new one. You can copy price books while they're in any status.

Here's how to copy a price book:

1. Navigate to **Sales > Price Books**.
2. Click the name of a price book in the list.
3. In the edit page, from the **Actions** menu, select **Copy Price Book**.
4. In the dialog box, enter a new, unique name for the price book and click **Save and Continue**.
5. Edit the price book as needed.

## Delete a Price Book

After you delete price books, the application removes them from the list of price books and they're no longer available in consuming applications. Keep in mind that you can only delete price books that are in Draft status.

To delete a price book.

1. Navigate to **Sales > Price Books**.
2. Click the name of a price book.
3. From the **Actions** menu, select **Delete Price Book**.

### Related Topics

- [Overview of Price Books](#)



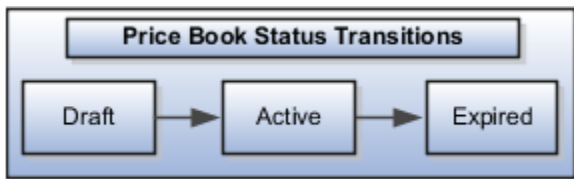
## Price Book Statuses

Price books have statuses, such as Draft or Active. The status of a price book determines what actions you can take on it.

Here are the price book statuses and additional details about the behavior of price books while in a specific status.

| Status  | Description                                                | Additional Details                                                                                                                                                     |
|---------|------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Draft   | Indicates a price book that's not yet available for use.   | <ul style="list-style-type: none"><li>Only price books in Draft status can be deleted.</li><li>Can be moved to Active status.</li></ul>                                |
| Active  | Indicates a price book that's available for use.           | <ul style="list-style-type: none"><li>Can be updated to Expired status. Note you can't delete expired price books.</li><li>Can't be updated to Draft status.</li></ul> |
| Expired | Indicates a price book that's no longer available for use. | <ul style="list-style-type: none"><li>Cannot be moved to Draft status; therefore, can never be deleted.</li></ul>                                                      |

Here are the transitions allowed for price book statuses. Price books start out as draft status, then move to active, and finally to expired.



## Add the Default Price Book Check Box

Expose the Default Price Book check box in the Edit Price Book page in order to mark a price book as the default one. The prices in the default price book are used before any other prices for products in your catalog.

Here's how to expose the Default Price Book check box in the Edit Price Book page.

1. Ensure you're working in an activate sandbox.
2. Select **Tools > Application Composer**.
3. In the navigation tree, expand **Standard Objects > Price Book Header**.
4. Click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.

8. In the Details Layout page that appears, click the edit (pencil) icon next to the Edit Subtab: Summary region.
9. Move Default Price Book from the Available Fields to the Selected Fields window.
10. Click **Save and Close**.
11. From the Details Layout page, click **Done**.
12. Make sure that the layout status for your layout is set to Active.
13. Test the changes as follows:
  - o Navigate to **Sales > Price Books** as a user with the Sales Administrator role.
  - o Edit a price book and ensure you can see the Default Price Book check box in the Edit Price Book page.
14. Publish the sandbox according to your company's business practices.

For more information, see the related topics in the Configuring Applications Using Application Composer guide.

#### *Related Topics*

## Use Access Groups to Secure Price Books

Predefined access group rules provide all users with global access to price book data, but you can configure this access for different groups of users.

Let's say you only want sales managers to be able to delete price books. You set up an access group with delete privileges just for those users.

Here are the high-level steps:

1. Plan out the different access levels needed for your users. For example, determine what access level to give only to your sales managers.
2. Create one or many access groups for the different access levels you want your users to have.
3. Assign resources to each group. For example, assign your sales managers to a new "price books" group.
4. For each group, create object sharing rules to specify the access levels.
5. Publish the rules and run a scheduled process to apply the access to group members.

For complete steps, see the related topics.

#### *Related Topics*

- [Use Access Groups to Secure Product, Product Group, and Price Book Data](#)
- [Considerations in Deciding When to Use Access Groups](#)

## Price Books in Opportunities and Accounts

### Overview of Integrating Price Books with Accounts and Opportunities

Integrate price books with opportunities and accounts to let salespeople provide the right prices at the right time. Here are just a few of the ways you can use price books to streamline your pricing capabilities:

- Price opportunity products according to specific agreements with your customers. Do this by associating price books with an account and defaulting the price book from the account onto opportunities associated with that account.
- Use Groovy scripting to default an appropriate price book based on different opportunity attributes like country, channel, or partner.
- Use Groovy scripting to update prices when items change on price books.
- Add custom price book fields to accounts and opportunities.

In this section, you can learn how to set default prices for an account and make the associated UI changes.

As a prerequisite, create a price book in the Price Books application. For steps, see the [Work with Price Books](#) in this chapter.

Here are the tasks we cover in this section:

1. Create a custom price book field for accounts and opportunities.
2. Add your custom field to account and opportunity pages.
3. Create a Groovy trigger to set the default price book and get prices.
4. Create a Groovy script to find updated prices that might have changed.
5. Add the Reprice Opportunity action to the Edit Opportunity page.
6. Copy the supplied Sales Representative role and add the Manage Price Books privilege to your new, custom role.

**Note:** Make these changes in a sandbox and publish it according to your company's processes.

## Create Price Book Field for Accounts and Opportunities

In order for salespeople to select a price book in the Edit Account and Edit Opportunity pages, you need to create a custom field called "Price Book".

Here's how to create the custom field:

1. Ensure you're working in an active sandbox.
2. Navigate to **Configuration > Application Composer**.
3. Navigate to **Standard Objects > Account > Fields**. For opportunities, navigate to **Standard Objects > Opportunity > Fields**.
4. Ensure you're on the **Custom** tab.
5. Click the **Create a custom field** icon.
6. In the **Select Field Type** dialog window, select **Choice List (Dynamic)**.
7. Click **OK**.
8. In the **Display Label** field in the Create Dynamic Choice List: Basic Information page, enter **Price Book**. As you click away from the Display Label field, the Name field automatically populates with the internal name. You can change this name now, but after you save the new field, you won't be able to change it.
9. Ensure **Updatable** is checked and **Required** is unchecked.
10. Click **Next**.
11. In the Create Dynamic Choice List: List of Values page, in the Related Object field, select **Price Book Header**.
12. Select **Name** in the List Selection Display Value field.
13. Click **Submit**.

14. Next, add the field to the Edit Account and Edit Opportunity pages.

## Add Price Book Field to Account and Opportunity Pages

Now that you have created the new Price Book field, you need to add the field to the Edit Account and Edit Opportunity pages.

1. In Application Composer, navigate to **Standard Objects > Account > Pages**. For opportunities, go to **Standard Objects > Opportunity > Pages**.
2. Ensure that you're on the **Application Pages** tab.
3. In the **Details Page Layouts** regions of Account: Pages or Opportunity: Pages, duplicate the standard layout and edit the resulting layout.

The detail steps are different for account and opportunity:

Account detail steps:

- a. In the Subtabs region, edit the Profile subtab (click the Profile icon).
- b. Edit the **Summary Edit Subtab: Summary** region.

Opportunity detail steps:

- a. In the Details Layout page, edit the **Edit Subtab: Summary** region.
4. In the Available Fields window, select and move the custom **Price Book** field to the Selected Fields list.
5. Click **Save and Close**.
6. Click **Done**.

## Set Default Price Book and Get Prices

You can use a Groovy script to set the default price book on an opportunity and get the latest prices onto the price book. The default price book can be set based on various opportunity attributes.

These opportunity attributes can be, for example, currency, customer geography, or customer account.

Here's how to set a default account price book on an opportunity.

Note that this procedure also sets a default Corporate price book on an opportunity, if an account price book can't be found.

1. Ensure you're working in an active sandbox.
2. In Application Composer, navigate to **Standard Objects > Opportunity > Server Scripts**.
3. Select the **Triggers** tab.
4. Select the **Add a New Trigger** icon.
5. In the Trigger field, select **Before Insert in Database**.
6. In the **Trigger Name** field, enter `SetPriceBook`.
7. In the Trigger Definition region, enter this script:

```
//Fetch the Id of Account Pricebook
def pricebookId = Organization?.PriceBook_Obj_c?.PricebookId;

// Set the Id of Account PriceBook to Opty
```

```
setAttribute('PriceBook_Id_c', pricebookId);
```

8. Click **Save and Close**.
9. Test the changes and publish the sandbox.

If a price book isn't defined in the Account object, you can define a default price book in Groovy as follows:

```
def accountplist=Organization?.getAttribute('PriceBook_c')
def optypelist=getAttribute('PriceBook_c')
if (optypelist == null ) {
    if (accountplist == null ){
        optypelist = 'Corporate' //This is the name of the default pricebook
    }
    setAttribute('PriceBook_c',accountplist)
```

**Note:** You can also add the Default Price Book check box to the Edit Price Book page using **Application Composer > Price Book Header object > Details Page Layouts**.

## How do I update prices on product lines?

You can also use a Groovy script to pull the list price for a product from the selected price book and stamp that value in Amount field on the product line.

1. Ensure you're working in an active sandbox.
2. In Application Composer, navigate to **Standard Objects > Opportunity > Opportunity Revenue > Server Scripts**.
3. Select the **Triggers** tab.
4. In the Server Scripts Opportunity Revenue page, in the Field Triggers section, select the **Add a New Trigger** icon. The page changes to the Create Field Trigger page, and the Trigger Type field defaults to **After Field changed**.
5. In the Create Field Trigger page, select **Product** for the Field Name.

**Note:** If there are two instances of Product in the list, select the first one.

6. In the **Trigger Name** field, enter `FetchPrice`.
7. In the Trigger Definition region, enter this script:

```
//Get the ID of the item:
def var_InventoryItemId = nvl(getAttribute('InventoryItemId'), (long) 0)
//Get the ID of the price book (this is useful if you have multiple price books):
def var_DCL_PriceBook = Opportunity?.PriceBook_Id_c //
//PriceBook is a dynamic choice list on the opportunity.
//Make a view of the PriceBookItem object, since that's where the prices for items are stored:
def view_PriceBookItem = newView('PriceBookItem')
def view_Criteria = newViewCriteria(view_PriceBookItem)
def view_criteria_row = view_Criteria.createRow()

//Define the first sort criteria. Basically, find all records in PriceBookItem that match the ID of the
//InventoryItemId on revenue.
def view_condition = view_criteria_row.ensureCriteriaItem('InvItemId')
view_condition.setOperator('=')
view_condition.setValue(var_InventoryItemId)

//Define the second sort criteria. If there are multiple price books that contain the same item with
//different prices, get the price of the item corresponding to the price book selected in the dynamic
//choice list on the opportunity.
```

```
def view_condition_1 = view_criteria_row.ensureCriteriaItem('PricebookId')
view_condition_1.setOperator('=')
view_condition_1.setValue(var_DCL_PriceBook)

//Execute the sort and query the records:
view_Criteria.insertRow(view_criteria_row)
view_PriceBookItem.appendViewCriteria(view_Criteria)
view_PriceBookItem.setMaxFetchSize(1400) //1,400 is the number of records in the system; change this
number according to your system records.
view_PriceBookItem.executeQuery()

def var_price // This is a variable that will hold the price from PriceBookItem
while(view_PriceBookItem.hasNext()){
def var_Row = view_PriceBookItem.next()

//Get the price from PriceBookItem for the item you want:
var_price = var_Row.getAttribute('ListPrice')
}
//Assign the price to the revenue field UnitPrice:
setAttribute('UnitPrice',var_price)
```

8. Click **Save and Close** Verify that the FieldName in the Triggers section appears as `InventoryItemId`.
9. Test the changes and publish the sandbox.

## Add Reprice Action to Edit Opportunity Page

Add an action in the Edit Opportunity page that salespeople can use to retrieve updated prices.

1. In Application Composer, navigate to **Standard Objects > Opportunity > Actions and Links**.
2. Click the **Create** icon.
3. In the Opportunity: Create Action or Link page, in the **Display Label** field, enter `Reprice opportunity`. As you click away from the Display Label field, the Name field automatically populates with the internal name.
4. In the **Type** field, ensure that **Action** is selected.
5. In the **Script** region, click the **New** icon.
6. In the Create Object Function page, in the **Function Name** field, enter `RepriceOpty`.
7. In the **Edit Script** region, enter this script:

```
def revenueItems = ChildRevenue
def pricebook = nvl (PriceBook_Obj_c, null)
if (pricebook == null)
return
def priceBookId = pricebook?.getAttribute("PricebookId")

def view_PriceBookItem = newView('PriceBookItem')
def view_Criteria = newViewCriteria(view_PriceBookItem)
def view_criteria_row = view_Criteria.createRow()
def view_condition = view_criteria_row.ensureCriteriaItem('InvItemId')
view_condition.setOperator('=')

view_Criteria.insertRow(view_criteria_row)
view_PriceBookItem.appendViewCriteria(view_Criteria)
def view_condition_1 = view_criteria_row.ensureCriteriaItem('PricebookId')
view_condition_1.setOperator('=')
view_condition_1.setValue(priceBookId)
while (revenueItems.hasNext()) {
def revenueLine = revenueItems.next()
def itemid= nvl(revenueLine.InventoryItemId, 0L)
def invorgid = nvl (revenueLine.InventoryOrgId, 0L)
```

```
view_condition.setValue(itemid)
//1,400 is the number of records in the system; change this number according to your system records.
view_PriceBookItem.setMaxFetchSize(1400)
view_PriceBookItem.executeQuery()
while(view_PriceBookItem.hasNext()){
    def var_Row = view_PriceBookItem.next()

    //Get the price from PriceBookItem for the item you want:
    revenueLine.setAttribute('UnitPrice', var_Row.getAttribute('ListPrice'))
}
```

8. Click **Save and Close**.
9. Back in the Opportunity: Actions and Links page, click **Save**.
10. Verify the action was created by going to **Opportunity > Server Scripts > Object Functions**. If you still don't see it, sign out and back in.
11. Add the action to the opportunity details page: Navigate to **Opportunity > Pages**.
12. Ensure that the **Application Pages** tab is selected.
13. In the Opportunity: Pages page, find the **Details Page Layouts** region. Duplicate the standard layout and then name and edit the copy.
14. In the Details Layout page, at the top right of the page next to the **Actions** drop-down list, click the **Edit** icon.
15. In the Buttons and Actions page, find the action you created and move it to from the **Available Actions** shuttle area to the **Selected Actions** shuttle area.
16. Click **Save and Close**.
17. Click **Done**.

## Create New Sales Representative Role and Add Price Books Privilege

In order for your sales representatives to have access to price books in opportunities, they need the Manage Price Books privilege in the job role you give them.

### High-Level Steps

It takes just three steps to set up the new role and assign it to users:

1. Copy the supplied Sales Representative role.
2. Edit your new, custom sales representative role to add the Manage Price Book privilege.
3. Assign the new sales representative role to all users who need access to price books in opportunities.

You must have the IT Security Manager job role for these tasks.

### Copy the Sales Representative Role

First, copy the supplied Sales Representative role:

1. Navigate to the **Tools Security Console**.
2. On the Roles tab of the Security Console, search for the Sales Representative job role (ORA\_ZBS\_SALES\_REPRESENTATIVE\_JOB).
3. Select the role in the search results.
4. In the search results, click the down arrow for the selected role and select **Copy Role**.
5. In the **Copy Options** dialog box, select the **Copy top role** option.
6. Click **Copy Role**.

7. On the Copy Role: Basic Information page, review and edit the **Role Name**, **Role Code**, and **Description** values, as appropriate.
8. Click the **Summary** train stop.
9. Click **Submit and Close**, then **OK** to close the confirmation message.
10. Navigate to the **Administration** tab.
11. Click the **Role Copy Status** subtab to monitor the progress of the copy. After it completes, edit the copied role.

## Edit and Assign the Role

Next, edit the new role to add the Manage Price Book privilege, and then assign the role to users:

1. Navigate to the **Roles** tab.
2. Search for and select your custom role.
3. In the search results, click the down arrow for the selected role and select **Edit Role**.
4. On the Edit Role: Basic Information page, edit the role name and description, if needed. Role code isn't editable.
5. Click **Next**.
6. On the Edit Role: Function Security Policies page, add the Manage Price Book privilege to the copied role:
  - a. Click **Add Function Security Policy**.
  - b. In the Add Function Security Policy dialog box, search for and select the Manage Price Book privilege.
  - c. Click **Add Privilege to Role**.
  - d. Close the Add Function Security Policy dialog box.
  - e. On the Edit Role: Function Security Policies page, scroll to the end of the list of privileges to see the new privilege you added.
  - f. Click **Next**.
7. Click the **Summary** train stop and confirm that the new privilege was added to your custom role.
8. Click **Submit and Close**, then **OK** to close the confirmation message.

## Assign the Role to Sales Representatives Using Role Provisioning

There are a few different options for assigning the role:

- If you want all sales representatives to get the custom role, just edit the existing provisioning rule for the Salesperson resource role to provision the custom role. See the topic, [Create Rules to Automatically Provision Job Roles to Sales Users](#), for the steps.
- But if you want only a specific group of users to get the new custom role, create a new resource role and a new provisioning rule for the resource role, then use import/export to change the resource role assigned to the specific users. See the topic, [Create Additional Resource Roles](#), for more information.
- If you only want to assign the role to a few users, you can do it manually on the Edit User page. For an example of changing the resource role for an individual user see the topic, [Change User Resource Roles When Job Assignments Change](#).

### Related Topics

- [Edit Job or Abstract Roles](#)
- [Steps for Setting Up Role Provisioning](#)
- [Create Additional Resource Roles](#)
- [How can I create rules to automatically provision job roles to sales users?](#)
- [How do I change user resource roles when job assignments change?](#)



# 21 Sales Catalogs

## Overview of Sales Catalogs

Using sales catalogs lets you:

- Use product group as a territory dimension so assignments can be made based on product.
- Give salespeople a mechanism to add product revenue to opportunities.
- Let salespeople add products to leads.
- Have product revenue available in forecasting and salesperson quota.

**Note:** While you can include individual products (also known as inventory items) in your catalog, they're not required unless you're integrating with a product application downstream, such as Oracle Configure, Price, and Quote Cloud (Oracle CPQ). For information on the setup of individual products, see the topics on sales products.

## Sales Catalog Key Features

Here are the key features of the sales catalog:

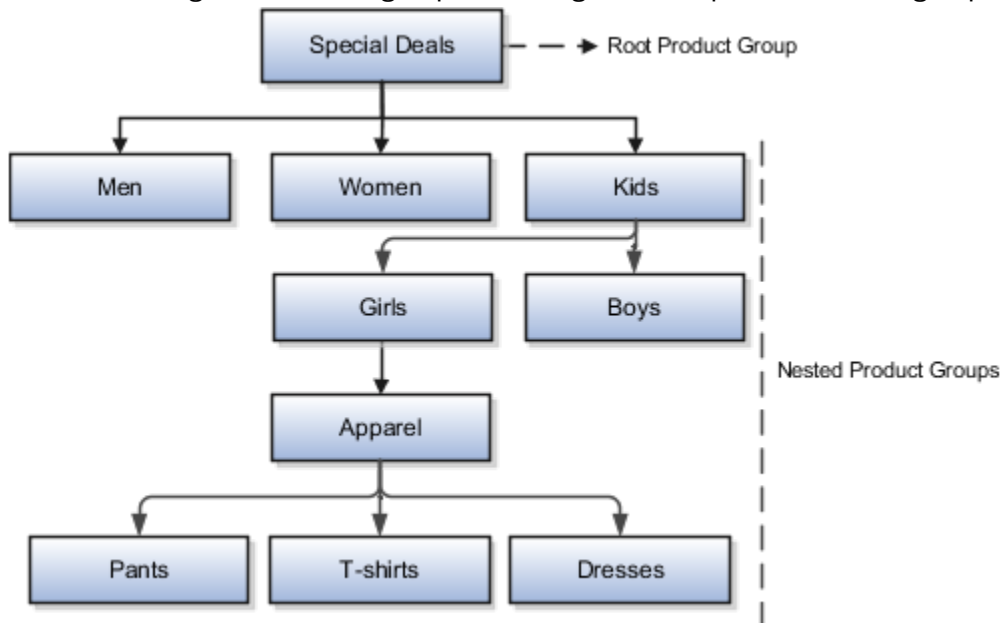
- Import your inventory list using standard import or import macros.
- Quickly build and deploy sales catalogs in a single administration UI.
- Build product groups in a hierarchy.
- Translate product group display name and description into different languages.
- Use the sales Products UI to create individual products that you add to the product catalog.
- Use price books and the default pricing region in the Products UI to price "standalone" products outside of the catalog hierarchy.

## Product Group Hierarchy Example

The following figure shows an example of a product group hierarchy.

In the example: At the top of the product group hierarchy is the root product group, named Special Deals. The nested groups begin with the child groups of the Special Deals root group. These include: Men, Women, and Kids. Within the Kids group, more nested groups appear, including Girls and Boys. Within the Girls group, a child group called Apparel appears. Within the Apparel group, further nesting occurs, with the groups Pants, T-shirts,

and Dresses. Together, the root group and configuration of parent and child groups make up the sample hierarchy.



#### Related Topics

- [Sales Catalog High-Level Setup Steps](#)
- [Add Products to the Catalog](#)
- [Validate the Sales Catalog](#)
- [Run the Refresh Denormalized Product Catalog Table Process](#)
- [Example of Creating a Sales Catalog](#)

## The Sales Catalog

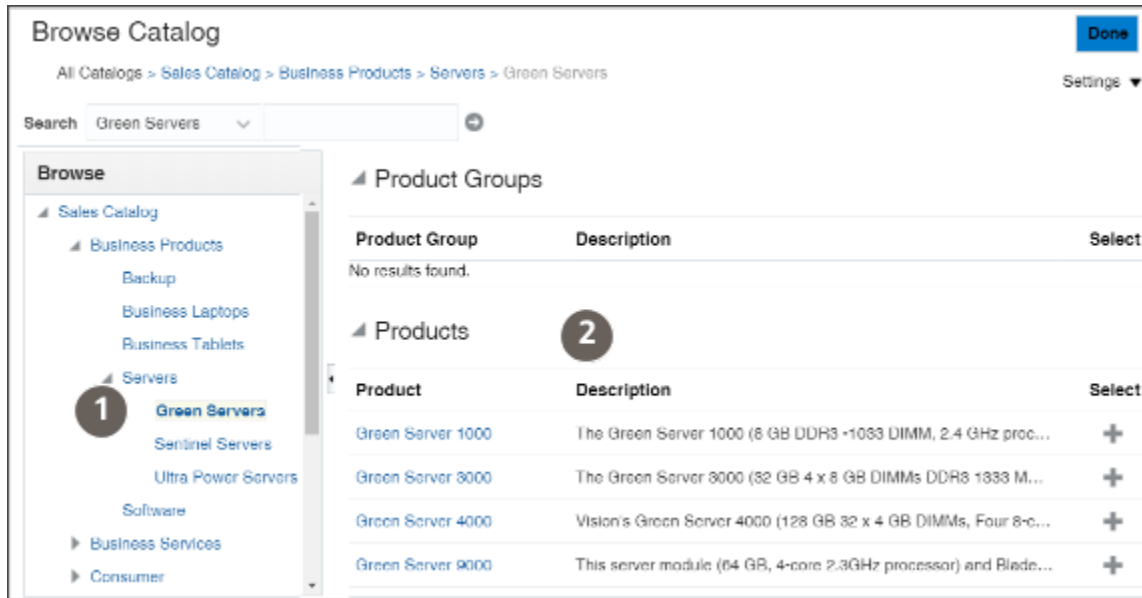
Salespeople enter the products or product groups that customers are interested in purchasing by making a selection from a sales catalog. They can either browse the catalog or start typing the product name when they make entries in opportunities and leads.

The sales catalog consists of a hierarchy of product groups, which classifies and organizes the products in your catalog. You can include a description for each product group and product. You can upload one image for each product.

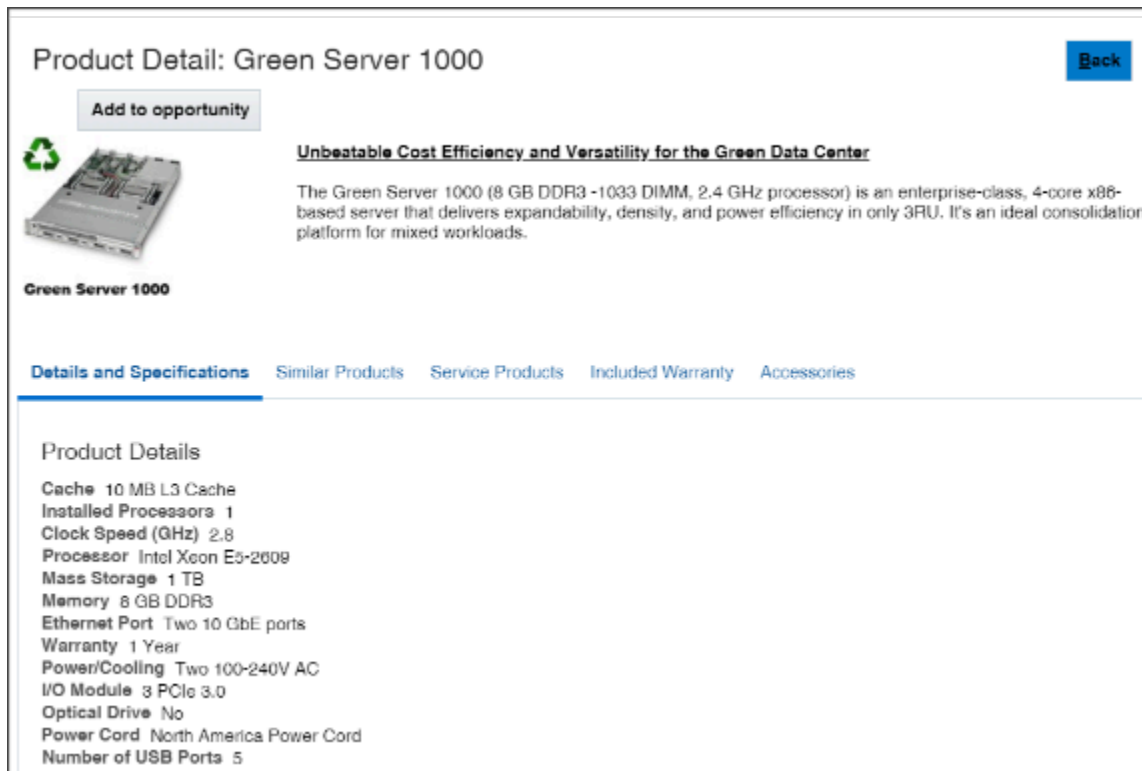
You can use product groups as a dimension in your sales territories and for sales forecasting. During forecasting setup, you can specify the number of levels in your sales catalog product group hierarchy that you want to forecast. For example, Vision Corp. uses product groups to assign specialists to help close deals on opportunities with the line of green servers that the company has just launched. The company also creates forecasts for each server line.

Here's a screenshot of the Browse page in the CX Sales UI, which salespeople see as they browse the catalog. The screenshot highlights the product group hierarchy in the Browse

section (callout 1) and the products with descriptions in the Products section (callout 2).



Salespeople can drill down into the individual product pages to view the product description and an image. Here's a screenshot of the Product Detail page in the CX Sales UI for a sample product. The page includes the product name, description, and image. The Details and Specifications tab and the rest of the tabs at the bottom of the page aren't used by the Sales Catalog.



## CX Sales and Fusion Service Catalogs

The building blocks of sales and service catalogs are the same. Both use product groups and products and you create them using the same UIs and import processes. You create a root product group and build your catalog underneath. Salespeople use the catalog to enter product interest in opportunities and leads. Service agents use the catalog for entering products into service requests. There are two differences between sales and service catalogs:

- How product groups are used.  
In sales, you can forecast by product groups and use product groups for assigning opportunities. In service, you can use product groups to channel service requests to the right work queue for resolution.
- Different product options determine if the product shows up for sales or for service.

Products must have the Eligible to Sell option selected for them to appear in the sales catalog and the Eligible for Service option selected for them to appear in the service catalog.

You can share products and product groups between the two catalogs and you can even create one catalog for both sales and service. If you do opt for a single catalog or even reuse the same product groups for the two catalogs, you must keep in mind that sales may discontinue selling some products that you may still need to service. Or sales may create product groups specific to promotions or seasonal sales.

## Products in the CX Sales and Fusion Service Catalogs

While you can create sales and service catalogs with product groups only, you must create products to take advantage of advanced sales features such as price books. You must also use products to enable integrations with other Oracle cloud services, including Oracle Configure, Price, and Quote (CPQ) Cloud. You can also use Application Composer to add fields and perform other modifications to products, a feature not available on product groups.

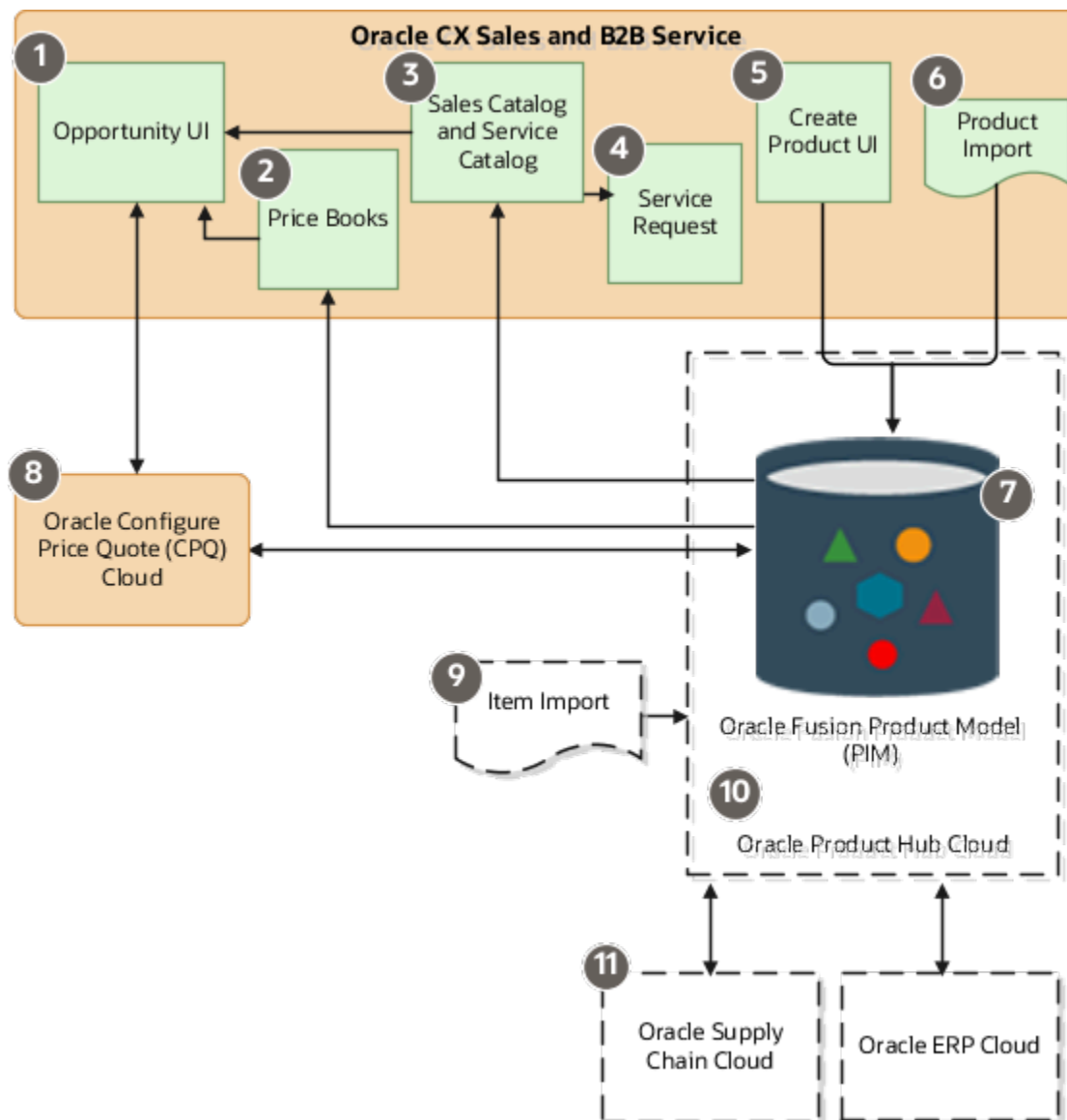
Products you create are also stored in the Oracle Fusion Product Model, which serves as the master item repository for all front-office cloud services. So, the product you create can be priced and quoted in Oracle CPQ Cloud and serviced in Oracle CX Sales and Fusion Service.

The Oracle Fusion Product Model, which is included with the different cloud services, provides basic functionality for use in the front-office cloud services. If you're implementing supply chain cloud services or ERP cloud services together with your sales application, then you must license the Oracle Product Hub Cloud Service and set up your items using the UIs and import features of Oracle Product Hub Cloud. You can't create products in your sales application with enough detail that would make them suitable for back-office supply chain applications. Sales applications don't need to track the physical locations of the items you're selling or shipping, for example, so all products you create in the sales application are created at the Item Master Organization level in the Oracle Fusion Product Model. Only the Oracle Product Hub Cloud includes the ability to manage item classes. All products created in the sales application are created at the default item class and use the Production design phase.

The following diagram outlines the role products play in Oracle CX Sales and Fusion Service and related cloud services:

- In Oracle CX Sales and Fusion Service, you can create the products for your sales and service catalogs either individually in the UI (indicated by callout 5) or you import products from a file (callout 6).
- Product records are created both in Oracle CX Sales and Fusion Service and in the Oracle Fusion Product Model (callout 7).
- You expose the products in the sales or service catalogs (callout 3) by associating them with product groups.
- Salespeople can browse or search the sales catalog from the Opportunity UI (callout 1) and select the products the customer is interested in buying. Only products with the Eligible to Sell option selected appear in the sales catalog.

- Service agents enter products from the Service Request UI (callout 4). Only products with the Eligible for Service option selected appear in the service catalog.
- You can price the products using price books (callout 2), or create quotes for them in Oracle Configure, Price, and Quote Cloud (callout 8). Price books and CPQ Cloud require additional integration, so aren't covered in this guide. (Although price books are a sales feature, you must integrate them with opportunities using Groovy scripting.)
- The Oracle Fusion Product Model (callout 7) forms the foundation of the Oracle Product Hub Cloud (callout 10), a powerful product management application designed for supply chain, order management, and inventory tasks, which must be licensed separately. Because the sales application uses less than a dozen of the hundreds of the item attributes that can be captured in Oracle Product Hub, you can't use the sales UIs or product import if you're implementing Oracle Product Hub Cloud. To create products in Oracle Product Hub Cloud that can be used with Oracle Supply Chain Cloud or Oracle ERP Cloud (callout 11), you must use the Oracle Product Cloud Hub UI and item import (callout 9).



# How You Create a Sales Catalog

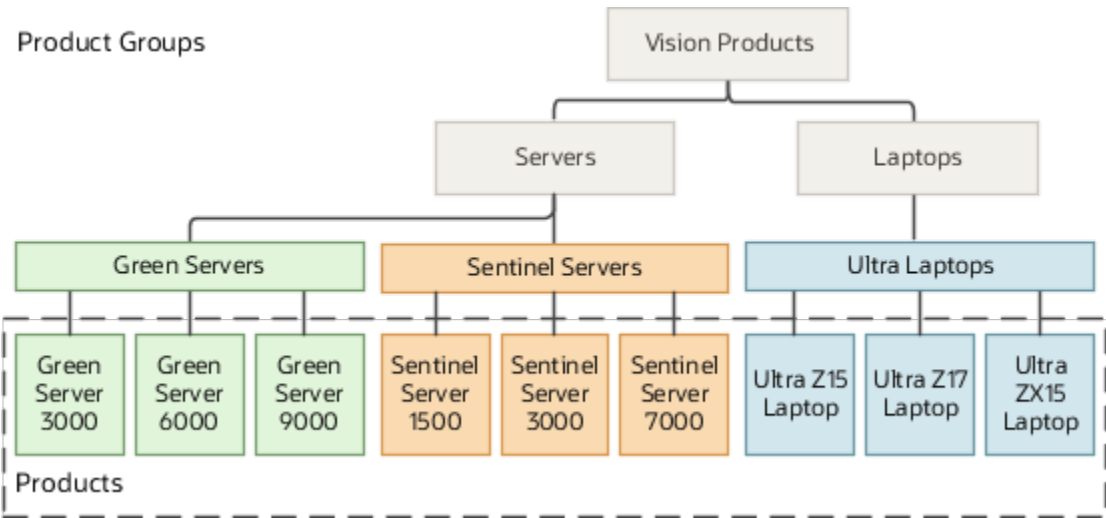
Here's an overview of how you create a sales catalog:

1. Create the root product group of the catalog. You can create the product group in the UI or you can import it with the rest of the product groups. You're required to create only the root product group. All the other product groups are optional.
2. Create the products for your sales catalog either in the UI or by importing them.
3. You can import the rest of the product group hierarchy, if any.
4. To display individual products in the sales catalog, you must associate the product groups with the products. You can create the association by editing each product group in the UI and selecting the products it contains. Alternatively, you can create the association between product groups and the products in your import.

## Sample Sales Catalog Structure

Here's a diagram of the Vision Corp. sales catalog structure. The company sells laptops and two types of servers: Green Servers and Sentinel Servers. To create the catalog, Vision Corp:

1. Creates Vision Products as the root product group in the UI.
2. Imports the products using the product import macro.
3. Imports the remaining product groups and their associations with the products using the product group import macro.



## Setup Tasks

### Sales Catalog High-Level Setup Steps

Creating your sales catalog involves a number of steps.

This table shows the high-level setup steps and where to find more information about the step:

**Note:** If you're using the Setup Assistant to create your catalog, consult the *Implementing Sales* guide first. When you use the Setup Assistant, many steps are done for you by the assistant.

| Step                               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Where to Find More Information                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Ensure prerequisites are set up    | Ensure that your prerequisite structures are set up before starting to create the catalog.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | See the <i>Prerequisite Setups for Sales Products</i> topic in this chapter                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Create the root product group      | Create the root product group. The root catalog or root product group is the top of the product group hierarchy. All other product groups are nested underneath.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | See the <i>Create the Root Product Group</i> topic in this chapter                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Create the product group hierarchy | <p>Add additional product groups to create the catalog hierarchy of product groups and subgroups.</p> <p>Once your hierarchy is set, you can add the product groups manually in the product groups pages, or you can import them. Importing products lets you use quick import macros or Import Management to create the entire product group and product hierarchy all at once.</p> <p><b>Note:</b><br/>If you're not integrating with an order management application or doing quoting, you can simply use a product group hierarchy without products. There's no need to use individual products unless you need to for downstream applications.</p> | <p>See:</p> <ul style="list-style-type: none"> <li>• <i>Create the Product Group Hierarchy</i> topic in this chapter</li> <li>• The topic, <i>Options for Importing Data Into Your Application</i>, as well as additional topics about importing products, in the <i>Implementing Sales</i> guide</li> </ul>                                                                                                                                                                                                                                                                  |
| Create or import products          | <p>If you're going to use individual products in the catalog, add products to the application. You can create products using the sales Products UI or the product model available with Oracle Supply Chain Management Cloud.</p> <p>You can also import products and the product hierarchy all at once. Or, you can use Import Management to import products and the hierarchy.</p>                                                                                                                                                                                                                                                                     | <ul style="list-style-type: none"> <li>• If using the sales Products UI, see the Products chapter in this guide</li> <li>• If using Oracle Supply Chain Management (SCM) Cloud product model see these guides: <ul style="list-style-type: none"> <li>◦ Oracle SCM Cloud Implementing Product Management</li> <li>◦ Oracle SCM Cloud Using Product Master Data Management</li> </ul> </li> <li>• The topic, <i>Options for Importing Data Into Your Application</i>, as well as additional topics about importing products, in the <i>Implementing Sales</i> guide</li> </ul> |
| Add products to the catalog        | If you're going to use individual products in the catalog, add products to the product group hierarchy.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | See the <i>Add Products to the Catalog</i> topic in this chapter                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Publish the sales catalog          | Publish the product group hierarchy that makes up the sales catalog. Perform this step                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | See:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

| Step                                                                                       | Description                                                                                                                                                                                                                                                                       | Where to Find More Information                                                                                                                                                                                          |
|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                            | <p>in the product groups pages in Setup and Maintenance.</p> <p>When you publish a catalog, the scheduled process, Refresh Denormalized Product Catalog Table for BI, runs automatically to update the current view of the product group hierarchy in consuming applications.</p> | <ul style="list-style-type: none"> <li>• <a href="#">Publish the Sales Catalog</a> topic in this chapter</li> <li>• <a href="#">Run the Refresh Denormalized Product Catalog Table</a> topic in this chapter</li> </ul> |
| Enable the sales catalog                                                                   | To enable a sales catalog for use in the applications, you associate it with a "usage" called the Base usage.                                                                                                                                                                     | See the <a href="#">Enable the Sales Catalog by Setting the Base Usage</a> topic in this chapter                                                                                                                        |
| Run the scheduled process, Refresh Denormalized Product Catalog Table for BI               | If you make a new assignment of Base to a root product group, you must run the scheduled process, Refresh Denormalized Product Catalog Table for BI. If you don't run the process, your product group hierarchy may not appear in the consuming applications.                     | See the <a href="#">Run the Refresh Denormalized Product Catalog Table</a> topic in this chapter                                                                                                                        |
| Enable salespeople to browse the catalog                                                   | Set the profile option, Browse Sales Catalog in Opportunities Enabled, to Yes to enable Browse Sales Catalog button on the Products table.                                                                                                                                        | See the <a href="#">Enable Salespeople to Browse the Catalog</a> topic in this chapter                                                                                                                                  |
| Let salespeople sort alphabetically                                                        | Salespeople browsing the sales catalog can sort products and product groups alphabetically after you set a profile option.                                                                                                                                                        | See <a href="#">Let Salespeople Sort the Sales Catalog Alphabetically</a> in this chapter                                                                                                                               |
| Set usage options for searching and browsing                                               | If you have set up the browse catalog feature, configure search and browse options.                                                                                                                                                                                               | See the <a href="#">Set Sales Catalog Search and Browse Options</a> topic in this chapter                                                                                                                               |
| Verify your setups                                                                         | After you have published and enabled your catalog and, optionally, set up browsing, validate your setups.                                                                                                                                                                         | See the <a href="#">Validate the Sales Catalog</a> topic in this chapter                                                                                                                                                |
| Set up eligibility rules for products                                                      | You can implement eligibility rules that enable salespeople to check product eligibility in opportunities.                                                                                                                                                                        | See the <a href="#">Set Up Product Eligibility</a> topic in the Products chapter of this guide                                                                                                                          |
| Set territory filtering options                                                            | You can configure whether the sales catalog displays only product groups and products within a user's sales territories, or if it displays all product groups and products defined in the catalog.                                                                                | See the <a href="#">Filter Sales Catalog Display by Territories</a> topic in this chapter                                                                                                                               |
| Integrate with Oracle Configure, Price, and Quote (Oracle CPQ) for additional capabilities | You can use the prebuilt Fusion Sales-Oracle CPQ integration to let salespeople manage a variety of quote-related activities.                                                                                                                                                     | See the quoting information in the <a href="#">Integrating Fusion Sales with Oracle CPQ</a> guide on Oracle Help Center                                                                                                 |



## Prerequisite Setups for Sales Products

Before you set up and use sales products, ensure that your environment has completed the prerequisite setups discussed in this topic.

### Create a Location

You must create a location for your organization so that you can select it when you create the item organization. However, if you have already set up locations as part of your initial setup with another cloud service, then you don't need to perform this step.

1. Sign in as a setup user and go to the following in Setup and Maintenance:
  - o Offering: Sales
  - o Functional Area: Sales Catalog and Products
  - o Show: All Tasks
  - o Task: Manage Locations
2. Click **Create**.
3. In the Location Information region **Name** field, enter any name. For example, HQ.
4. Enter any combination of letters or numbers without spaces in the **Code** field. For example, HQ.
5. You don't need to change the other values.
6. Click **Submit**.

The application displays a warning informing you that the request will be submitted.
7. Click **Yes**.
8. Click **OK** to close the confirmation message.

### Create Item Master and Ensure Setup of Location

Sales products functionality relies on the item master organization, the organization that holds the definitions of all products your company plans to sell. Therefore, before you can use products in your catalog, you must set up a location and then an item master organization.

For more information, see the related topics and these guides:

- Oracle Applications Cloud Understanding Enterprise Structures guide
  - Oracle SCM Cloud Implementing Product Management guide
  - Oracle SCM Cloud Using Product Master Data Management guide
1. Sign in as a setup user and go to the following in Setup and Maintenance:
    - o Offering: Sales
    - o Functional Area: Sales Catalog and Products
    - o Task: Manage Item Organizations
  2. On the Manage Item Organizations page, click **Create** (the plus icon).
  3. Enter any name in the **Name** field, for example, **Vision Item Master**.

You must select this name when setting the system profile option Sales Products Item Organization in a separate and related task. This name is visible only during setup.

4. In the **Organization** field, enter any combination of up to 18 uppercase letters and numbers, for example, **VISION**.  
You must enter this name in the separate and related setup task: Manage Spoke Systems.
5. In the **Name** field in the Location region, click the down arrow and select **Search** from the list.  
The Search and Select: Location Details window appears.
6. In the **Name** field, enter the name of the location you created.
7. Click **Search**.
8. Select the organization name and click **OK**.
9. On the Create Item Organization page, click **Next**.
10. On the Manage Item Organization Parameters page, make sure the organization name you entered (**vision Item Master**) is selected in the **Item Master Organization** list. This selection establishes the organization as the item master.
11. In the **Starting Revision** field, enter a number. For example, 1. Again, your entry doesn't matter.
12. Click **Save and Close**.
13. Click **Done**.

## Ensure Setup of Units of Measure

Units of measure (UOMs) are standard definitions for product measurements; therefore, you must set up UOMs. If UOMs are already set up as part of your company's existing setups, then you can skip this step.

Setting up UOMs involves creating the larger UOM classes (or categories), as well as the UOMs themselves. For example:

- If you're selling consulting services where you charge by the hour and minute, then you set up Time as the UOM class and Hour and Minute as UOMs.
- If you're selling goods that are priced by the box and by the unit, you set up Quantity as the UOM class and Box and Each as the UOMs.
- If you're selling and pricing goods by the meter, then you set up Dimension as the UOM class and Meter as the UOM.

**Note:** Each class can have only one base UOM. Base UOMs should generally be the smallest UOM in the class.

**Tip:** When disabling UOMs, disable the conversions first, then the UOM. If the UOM you're disabling is a base unit, the class should be disabled also. After an item has been defined in the item master, then the primary UOM for that item can't be modified.

1. Sign in as a setup user and go to the following in Setup and Maintenance:
  - Offering: Sales
  - Functional Area: Sales Catalog and Products
  - Task: Manage Units of Measure
2. Create the class for the unit of measure:
  - a. Click **Manage UOM Classes**.

b. On the Manage UOM Classes page, set up each class:

- i. Click **Add**, (the plus sign icon in Search Results).
- ii. Enter the class code (no spaces permitted), class name, and optional description.

For example, for quantity, enter `QUANTITY` as the **Class Code**, `Quantity` as the **Class Name**.

- iii. Enter a code (three-character limit) and name for the smallest unit you're selling in the **UOM Code** and **Base UOM Name** fields.

For example, for the class Quantity, enter `Ea` as the **UOM Code** and `Each` as the **Base UOM Name**.

Salespeople use your entry in the name field for entering opportunity quantities.

Here's a screen shot of the Manage UOM Classes page:

| * Class Code | * Class Name | Description | * UOM Code | * Base UOM Name | Base UOM Description | End Date |
|--------------|--------------|-------------|------------|-----------------|----------------------|----------|
| TIME         | Time         |             | Min        | Minute          |                      |          |
| QUANTITY     | Quantity     |             | Ea         | Each            |                      |          |

3. Click **Save and Close**.

4. You created the smallest unit of measure for each class. Now create any additional units of measure for each class:

- a. On the Manage Units of Measure page, click **Add**, (the plus sign icon) in Search Results.
- b. Enter the code (maximum of three characters) and the name of the unit of measure.

For example, if your smallest unit of measure for the class Time was Minute, then create Hour as another unit of measure if your organization charges by the hour.

- c. Select a class from the **Class Name** list.

5. Click **Save**.

Here's a screen shot of the Units of Measure page with Hour and Minute units of time measure:

6. Click Manage **UOM Standard Conversions**.

7. On the Manage UOM Standard Conversions page, enter the conversions for each of the additional units of measure you created:

- Enter the UOM name, for example, **Hour**, and click **Search**.
- Enter the conversion. For Hour, enter **60** to indicate there are 60 minutes in the hour.

Here's a screen shot of the Manage UOM Standard Conversions page showing the conversion for the hour unit of measure.

8. After you enter all of the conversions, click **Save and Close**.

## Specify the Item Master Organization for Sales Products

You must set the Sales Products Item Organization system profile option to the item master organization you just created.

- Sign in as a setup user and go to the following in Setup and Maintenance::
  - Offering: Sales

- Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. In the **Profile Display Name** field, enter **Sales Products Item Organization**.
  3. Click **Search**.
  4. Click the name of the profile option in the search results.
  5. In the **Profile Value** field, select the item master organization you created from the list.
  6. Click **Save and Close**.

## Identify the Item Master Organization as the Source of Import Data

You must specify the item organization as the default source of the import data using the Manage Spoke Systems task. Spoke systems (also called source systems) identify the source of import data.

1. Open the **Manage Spoke Systems** task from the implementation project. Alternatively, you can search for the task by name in the Setup and Maintenance work area. (You must use the side-panel search because the task isn't in the Sales offering.)

The Manage Spoke Systems page appears. You can ignore any error message you receive regarding read permissions.

2. In the **Name** column in the Search Results region, click the **Product Information Management Data Hub** link.
3. On the Edit Spoke System: Product Information Management Data Hub page, Import Options tab, select the item master organization name you created earlier from the **Default Organization** list. For example, **VISION**.

Here's a screen shot of the Edit Spoke System: Product Information Management Data Hub page highlighting the location of the Default Organization field:

**Edit Spoke System: Product Information Management Data Hub** Publish ▼ Save Save and Close Cancel Last Saved: 5/24/17 8:30 PM

Code: PIMDH Category: Internal system

Name: Product Information Management Data Hub

Description: Used by Product Information Management Data Hub for

**Import Options** Publication Options

**Import** Pack

Schedule: Manual ▼

**Default Organization**: VISION ▼

Update: All components ▼

Process Items: Per Item ▼

**Data Quality** New Item Request

— Check data quality on upload

New Item Request: One per Item ▼

Effective Date: Type default ▼

**Item Structure** Change Order

Name: Primary ▼

Update: Changed components only ▼

Change Order: One per Item ▼

Effective Date: Type default ▼

4. Click **Save and Close**.
5. Click **Done**.

### Related Topics

- [Sales Products High-Level Setup Steps](#)
- [Item Master Organizations](#)
- [Item Organizations](#)
- [How Units of Measure, Unit of Measure Classes, and Base Units of Measure Relate to Each Other](#)
- [How to Assign Base Units of Measure to Unit of Measure Classes](#)

## Create the Root Product Group

The root product group is the top-level product group in your catalog. The display name you use appears in the UI for users.

**Note:** If you're importing product groups, follow the [steps](#) in the [Implementing Sales](#) guide.

Here's how to create the root product group:

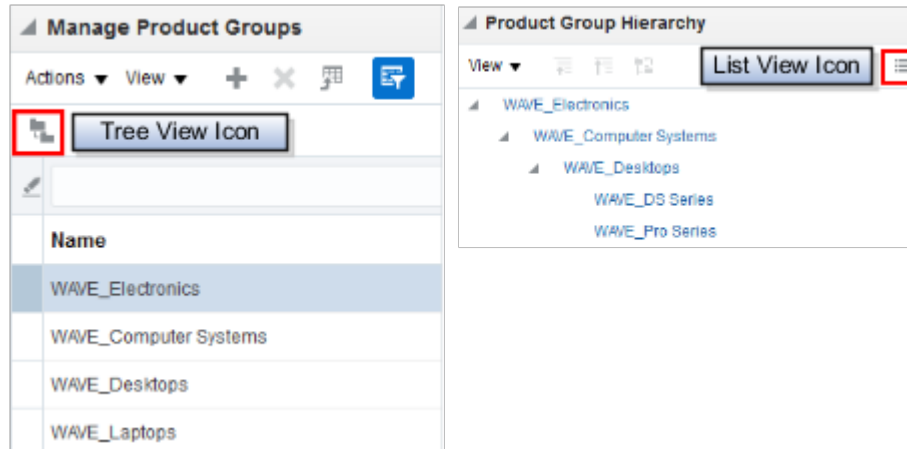
1. In Setup and Maintenance, go to:
  - Offering: Sales
  - Functional Area: Sales Catalog (or Sales Catalog and Products)
  - Task: Manage Product Groups
2. In the Manage Product Groups page, click the create icon (the add icon available in the toolbar in the left pane).
3. In the **Name** field, enter a unique name without spaces. This is the internal name of the group.
4. In the **Display** field, enter the product group display name. This is the name that displays in the UI to users.
5. Optionally, enter a description and start and end dates.
6. Select these check boxes:
  - **Active:** Your catalog must be active to be used in consuming applications.
  - **Root Catalog:** The root catalog is the top product group in the hierarchy. All other product groups created under it are considered subgroups. You can only add root catalogs to the Base usage in the Manage Product Group Usage page. You need to add your catalog to the Base usage so that it can be used in consuming applications.
  - **Locked:** A product group must be "locked" to be edited.
7. Deselect the **Allow Duplicate Children** check box. You must deselect this check box because the same product groups can't appear multiple times in the sales catalog hierarchy.
8. Leave the **Allow Selection** check box checked.
9. Click **Save and Close**.
10. Verify that the root product group appears in the Manage Product Groups pane.

## Create the Product Group Hierarchy

If you're manually creating the product group hierarchy in the UI, create the remaining product groups under the root product:

1. Click the root product group in the side pane.

Keep in mind that when you view product groups in the Manage Product Groups page, you have two view options: List view: When you first enter the Manage Product Groups page, you see the product groups as a list of folders. Click the tree view icon to enter tree view. Tree view: Tree view shows the product groups as nested parent-child groups. To return to list view, click the list view icon. In order to see the list view icon and the list of product groups, you may need to expand the Manage Product Groups pane. Here's what the list view and tree view icons look like on the Manage Product Groups page:



2. In the Manage Product Groups page, click the **Subgroups** tab in the main work area.

The product group information for the selected group appears in the main work area.

**Tip:** A product group must be "locked" to be edited, so ensure that the parent of the product group you're creating is locked.

3. Click the **Create** icon.
4. In the Create Subgroup dialog box, enter the product group information.
  - o In the **Name** field, enter a unique name without spaces.
  - o In the **Display** field, enter the product group display name.
  - o Enter a description and start and end dates if you want.
  - o Select these check boxes:
    - **Active:** Only active product groups are available for use in the consuming applications.
    - **Root Catalog:** Don't select the **Root Catalog** check box. You can have only one root catalog.
  - o Deselect the **Allow Duplicate Children** check box to make sure that product groups and products don't appear multiple times in the hierarchy.
5. Click **Save and Close**.
6. Verify that the product subgroup is visible in the Manage Product Groups pane. If the new subgroup doesn't appear, then click **View** and then **Refresh**.
7. Repeat the steps to create additional levels in your sales catalog hierarchy.

## Add Products to the Catalog

Now that you have created products following the steps in the Products chapter of this guide, or, if you have imported them, your next step is to add them to the product groups that make up the sales catalog hierarchy.

Here's how to manually add products to the sales catalog product group hierarchy.

1. In Setup and Maintenance, go to:
  - o Offering: Sales
  - o Functional Area: Sales Catalog and Products
  - o Task: Manage Product Groups
2. In the Manage Product Groups page, in the product group hierarchy, select the product group that you want to add products to.
3. Lock the product group for editing by clicking the **Lock** button.
4. Click the **Products** tab for the product group you selected.
5. In the **View** filter, ensure that the Administration view is selected.
6. In the products table, select **Actions > Select and Add**.
7. In the Select and Add: Products screen, search for and select the product you're adding.
8. Click **Apply** and then **OK** in the select and add window.

The application returns to the Manage Product Groups page with the product added to the product group.
9. Click the **Publish** button to publish the product group.
10. Finally, click **Yes** in the Confirm Publish dialog window and then dismiss the confirmation message. The application publishes the product group.
11. Save your changes.

To select the organization that provides the set of products available for marketing and sales activities, select an option in the QSC\_SALES\_PRODUCTS\_INVENTORY\_ORG\_ID profile value.

For more information about how to create products manually in the sales UI, see the Products chapter in this guide. To understand how to import products and the product hierarchy, see the *product import topics* in the *Implementing Sales* guide.

Of course, if you're integrating with Oracle Supply Chain Management (SCM) Cloud, you may be creating product in that application's Products screens. To understand this integration a little more see the *Products* chapter in this guide.

### Related Topics

- [Overview of Sales Products](#)
- [What are the available data import options?](#)

## Enable Salespeople to Browse the Catalog

If you want salespeople be able to browse the catalog in opportunities and leads, rather than select products from a list, set the profile option, Browse Sales Catalog in Opportunities Enabled, to Y.



The application shows the Browse Sales Catalog button on the Products table in opportunities and leads after you do this:

1. In Setup and Maintenance, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Opportunity Profile Options
2. Search for:
  - Profile Display Name: Browse Sales Catalog in Opportunities Enabled
  - or
  - Profile Option Code: MOO\_ENABLE\_BROWSE\_CATALOG
3. In the list that's returned, click on the profile option name link.
4. In the Profile Values region, set the Profile Value to `x`.
5. Save your changes.

## Publish the Sales Catalog

After building your catalog, you must publish it. While your catalog may have many product group nodes, you must at least publish the root group.

After you publish the at least the root group, you enable the catalog by associating the root group with the Base usage. Find these steps in the topic, [Make Your Sales Catalog Available for Use](#), available in the related links section.

Here's how to publish the root group:

1. Lock the root product group and the remaining groups in your hierarchy that you want to make available to end users.
2. Select the root group and click the **Publish** button.

**CAUTION:** When you publish a node in the hierarchy, the application tries to also publish all of the locked product groups. So, if you have product groups in the application that you don't want published, be sure to unlock them so that they don't get published with the root and its subgroups.
3. Click **Yes** in the Confirm Publish dialog box.
4. Click **OK** on the confirmation message that's displayed.
5. Click **Save and Close**.

### Related Topics

- [Sales Catalog High-Level Setup Steps](#)

## Enable the Sales Catalog by Setting the Base Usage

Now that you've built your catalog, you enable it by associating it with a "usage" called the Base usage.

1. In Setup and Maintenance, go to:

- Offering: Sales
  - Functional Area: Sales Catalog and Products
  - Task: Manage Product Group Usage
2. In the Manage Product Group Usage page, select the Base record. If a product group is already associated with the Base usage in the Details section in the portion of the screen, then you can remove the product group by selecting it and clicking the Delete icon.
  3. In the Details section, click the **Select and Add** icon.
  4. In the dialog box that appears, search for the root catalog that you just created.
  5. Select the record and click **OK**.
  6. In the Manage Product Group Usage page, click **Save and Close**.

**Note:** Each time you make a new assignment of Base to a root product group, be sure to run the scheduled process, Refresh Denormalized Product Catalog Table for BI. If you don't run the process, your product group hierarchy may not appear in the applications. See the topic, *Run the Refresh Denormalized Product Catalog Table Process*, for more information.

## Run the Refresh Denormalized Product Catalog Table Process

Every time you publish a catalog, the scheduled process, Refresh Denormalized Product Catalog Table for BI, runs automatically to update the current view of the product group hierarchy in the applications.

In addition, each time you make a new assignment of Base to a root product group, you must run the process. If you don't run the process, your product group hierarchy may not appear in the applications.

### Run the Process

Here's how to run the Refresh Denormalized Product Catalog Table for BI process:

1. Sign in as a setup user and navigate to **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog window, click the down-arrow next to the **Name** field and click **Search**.
4. In the Search dialog window, enter **%Refresh%**, and click **Search**.
5. Select the **Refresh Denormalized Product Catalog Table for BI** process in the results that are returned and click **Ok**.
6. Click **Ok** again, if needed.
7. In the Process Details window, click **Submit**.

#### Related Topics

- [Sales Catalog High-Level Setup Steps](#)
- [Enable Salespeople to Browse the Catalog](#)
- [Validate the Sales Catalog](#)
- [Best Practices for Sales Catalog Setup](#)

## Validate the Sales Catalog

After you publish and enable your catalog, validate that the product groups are appearing in leads and opportunities:

1. Sign in as a sales manager or salesperson.
2. Navigate to **Sales > Leads** and create a lead.
3. In the Create Lead window, click the **Primary Product** search icon and verify that you can see the product groups in the search utility.
4. Next, navigate to **Opportunities** and create an opportunity.
5. Search for the opportunity you just created and edit it.
6. In the Products region, click **Add**.
7. For Type, select **Group**.
8. In the Product list, verify that your product groups display.
9. In the Products table, click the **Browse Sales Catalog** button. Ensure that you can browse the catalog. Note that this option is available only if the administrator has enabled it.

### Related Topics

- [Sales Catalog High-Level Setup Steps](#)
- [Enable Salespeople to Browse the Catalog](#)
- [Run the Refresh Denormalized Product Catalog Table Process](#)
- [Best Practices for Sales Catalog Setup](#)

## Usages, Options, and Actions

### Overview of Sales Catalog Usages

Each catalog is associated with an attribute called a "usage" that specifies the application areas where it's in use. Typically, it's the Base usage that you use for your catalog. It's the one predefined for the sales applications such as opportunities and leads.

Oracle also supplies a few other usages that are described here.

Here are the predefined usages:

| Usage         | Description                                                                                  |
|---------------|----------------------------------------------------------------------------------------------|
| Base          | Used for the sales applications, such as forecasting, territories, opportunities, and leads. |
| Help Desk HCM | Used for Human Capital Management Cloud.                                                     |
| Loyalty       | Used for Loyalty Cloud.                                                                      |

| Usage                                    | Description                                                                  |
|------------------------------------------|------------------------------------------------------------------------------|
| Opportunity Management Alternate Catalog | Used as an alternate for opportunities, for example for Outlook integration. |
| Partner Management                       | Used for partner management.                                                 |

Within a usage, you can set various options and actions, as described in the topic, [Overview of Setting Sales Catalog Options and Actions](#).

#### Related Topics

- [Overview of Setting Sales Catalog Options and Actions](#)
- [Set Sales Catalog Options and Actions](#)
- [How can I set exceptions for particular usages of product groups?](#)
- [Sales Catalog High-Level Setup Steps](#)

## Overview of Setting Sales Catalog Options and Actions

You can configure various options and actions for your catalog.

The options and actions include:

- **Product Groups:** Specify which catalogs the usage includes.
- **Modes:** Create and maintain "modes", which in the catalog are departments within your organization that use a particular product group as their parent catalog. Modes are used in combination their parent product group and further with the usage options you set.
- **Templates:** Select the template that determines how the catalog is displayed for this mode of usage.
- **Functions:** Configure functions, such as whether to run the eligibility rules or enforce territory restrictions.
- **Miscellaneous:** Change miscellaneous catalog display settings, such as button labels or number of items per page.

See the [Set Sales Catalog Options and Actions](#) topic for steps.

### Functions

In the Functions tab, you can specify options for eligibility checks, display of prices, and product display filtering by territory.

Here are the function options:

| Function           | Description                                                                                        | Value     | Effect                                                                                    |
|--------------------|----------------------------------------------------------------------------------------------------|-----------|-------------------------------------------------------------------------------------------|
| Eligibility Engine | Determines whether to display the eligibility of products based on the eligibility rules in place. | Don't run | The eligibility service is off. Users can't check eligibility of products in the catalog. |

| Function         | Description                                                                           | Value                | Effect                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------|---------------------------------------------------------------------------------------|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                  |                                                                                       | Run                  | The eligibility service is on. Users can check eligibility of products in the catalog.                                                                                                                                                                                                                                                                                                                                                                 |
| Pricing Engine   | Determines whether to display prices for a product, if pricing integration is set up. | Don't run            | The pricing service is off. Prices don't display in the catalog.                                                                                                                                                                                                                                                                                                                                                                                       |
| Not applicable   | Not applicable                                                                        | Complex              | The pricing service is on. The catalog shows prices, such as List Price, Your Price, and Discount Price.                                                                                                                                                                                                                                                                                                                                               |
| Not applicable   | Not applicable                                                                        | Simple               | The pricing service shows List Price only.                                                                                                                                                                                                                                                                                                                                                                                                             |
| Territory Engine | Determines whether to display product groups and products in a territory.             | Don't run            | Territory filtering is off. The Filter by Territory check box doesn't display.                                                                                                                                                                                                                                                                                                                                                                         |
| Not applicable   | Not applicable                                                                        | Enforce territory    | Territory filtering is on, but is transparent to the user. The Filter by Territory check box doesn't display.                                                                                                                                                                                                                                                                                                                                          |
| Not applicable   | Not applicable                                                                        | Display user choices | <ul style="list-style-type: none"> <li>• Checked by default: Territory filtering is on. The territory filter check box is displayed and checked by default. The user can deselect the check box to disable the territory filtering.</li> <li>• Unchecked by default: Territory filtering is off. The territory filter check box is displayed and deselected by default. The user can check the check box to enable the territory filtering.</li> </ul> |

## Miscellaneous Actions

In the Miscellaneous tab, you can set various catalog display preferences, such as the button labels, to display and the number of products to display per page.

This table shows the display options:

| Name                  | Description                                                 |
|-----------------------|-------------------------------------------------------------|
| Add item button label | The selected value is shown next to the product at runtime. |

| Name                                       | Description                                                                                                                                                                                                             |
|--------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add category button label                  | The selected value is shown next to the catalog or category at runtime.                                                                                                                                                 |
| Add category enabled indicator             | Allows buttons to be shown next to the catalog or categories.                                                                                                                                                           |
| Enforce product group selection            | Hides sales catalog product group hierarchy nodes in the runtime UI. Click Yes to make it so users can't select product groups while browsing and hide product groups in the opportunity Products table list of values. |
| Records per page                           | The number of records to be displayed per page.                                                                                                                                                                         |
| Sort by format text                        | The sort format of the entire label that you want displayed in the runtime interface. The default is {ATTR}: {SORT_ORDER}.<br><br>Example: Name: A to Z.                                                                |
| Sort by product label prefix               | The sort format of the prefix label that you want displayed.<br><br>Example: If the default is Name: A to Z, you can select an alternate label for Name. It could be Item: A to Z.                                      |
| Sort by sequence product ascending label   | The sort format of the ascending suffix label that you want displayed.<br><br>Example: If the default is Name: A to Z, you can select an alternate for A to Z. It could be Name: Ascending.                             |
| Sort by sequence product descending label  | Sort format of the descending suffix label that you want displayed.<br><br>Example: If the default is Name: Z to A, you can select an alternate for Z to A. It could be Name: Descending.                               |
| Sort by sequence ascending first indicator | Select Yes to display ascending labels first in the Sort By list of values.                                                                                                                                             |
| Show immediate child products only         | Shows immediate products of a given category disregarding the standard action of showing all products (including child categories) if narrow by is defined on the category.                                             |
| Image server                               | Identifies the source of images for products and product groups.                                                                                                                                                        |
| Image server alternate path                | Identifies an alternate image source location (URL)                                                                                                                                                                     |
| Enable transactional attribute             | Allows transactional attributes to show up in product detail page. Transactional attributes are attributes that can be selected such as color and size of shirt.                                                        |
| Hidden category optional attribute list    | You can specify the attributes you would like to hide from the category list. Enter a comma-separated list of attributes to be hidden.                                                                                  |
| Hidden product optional attribute list     | You can specify the attributes you would like to hide from the product pages. Enter a comma-separated list of attributes.                                                                                               |

| Name                 | Description                                                                          |
|----------------------|--------------------------------------------------------------------------------------|
| Hide quantity        | To hide the quantity field shown in the product page, set this to Yes.               |
| Hide unit of measure | To hide the unit of measure field shown in the product detail page, set this to Yes. |

#### Related Topics

- [Sales Catalog High-Level Setup Steps](#)
- [Overview of Sales Catalog Usages](#)
- [Filter Sales Catalog Display by Territory](#)
- [Disable Sales Catalog Product Group Display](#)

## Set Sales Catalog Options and Actions

You can use the product group usage pages in Setup and Maintenance to change many actions of the sales catalog in the runtime UI.

For example, you can configure whether the sales catalog shows only product groups and products within a salesperson's territories, or if it shows all product groups and products defined in the catalog.

### Set Options and Actions

Here are the steps to set miscellaneous options and actions:

1. Select the **Base** catalog in the upper portion of the page. (If your catalog uses a different usage, then select it.) In the Details region of the page, the Product Groups tab shows the catalogs associated with the usage you have selected.
2. To have the settings apply to a specific product node (or catalog), optionally, in the Product Groups tab, select the product group before making the changes in the other tabs.
3. To modify functions, such as territory filtering, click the **Functions** tab in the Details section of the page.

Within the **Functions** tab, click the **Value** drop-down list for the option you want to modify. If multiple applications have a row for an option, then select the row that has the application you want the setting to apply to. The applications that can use each option appear in the Mode column of the Functions tab. For example, click **Territory engine** for the Opportunity Management application shown in the Mode column.

4. To set miscellaneous options, such as button labels to display and the number of products to display per page, click the **Miscellaneous** tab and then make your selection.
5. Save your changes.

For more information on the options that can be set, see the topic, Set Sales Catalog Options and Actions.

#### Related Topics

- [Sales Catalog High-Level Setup Steps](#)
- [Overview of Sales Catalog Usages](#)
- [Overview of Setting Sales Catalog Options and Actions](#)

## Additional Configurations

### Enable Salespeople to Browse the Catalog

If you want salespeople be able to browse the catalog in opportunities and leads, rather than select products from a list, set the profile option, Browse Sales Catalog in Opportunities Enabled, to Y.

The application shows the Browse Sales Catalog button on the Products table in opportunities and leads after you do this:

1. In Setup and Maintenance, go to:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Opportunity Profile Options
2. Search for:
  - o Profile Display Name: Browse Sales Catalog in Opportunities Enabled
  - or
  - o Profile Option Code: MOO\_ENABLE\_BROWSE\_CATALOG
3. In the list that's returned, click on the profile option name link.
4. In the Profile Values region, set the Profile Value to Y.
5. Save your changes.

### Set Sales Catalog Search and Browse Options

The browse catalog feature lets salespeople search and browse product groups and products in a hierarchy view. When configuring search and browse, you set these two options:

- Search Product Groups: Specifies whether the search returns product groups and products, or only products. If you're using not using products in your catalog, then you must set this option to yes.
- Show Immediate Child Products Only: Specifies which products display in the Products heading in the Browse Catalog window. You can ignore this option if you're not using products in your catalog.

#### Search Product Groups Option

In the Browse Catalog window, users enter keywords to search for product groups and products. The Search Product Groups option specifies whether the search should return product groups and products, or only individual products.

Take a look at this table to understand how to use the Search Product Groups option.

| Description                                                                                          | Settings                                                                                                | Example When Set to Yes                                                | Example When Set to No                                                   |
|------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------|--------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>• Determines whether the search finds product groups</li></ul> | <ul style="list-style-type: none"><li>• Yes: Search returns both product groups and products.</li></ul> | Search for the term <b>Green</b> : The application returns all product | Search for the term <b>Green</b> : The application returns only products |



| Description                                                                                                                                                | Settings                                                                                                                                                                      | Example When Set to Yes                                                                                                                                                                  | Example When Set to No                                                                                                                  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>and products or only products.</li><li>Searches names and descriptions.</li><li>The default setting is no.</li></ul> | <ul style="list-style-type: none"><li>If you're using not using products in your catalog, then you must use this setting.</li><li>No: Search returns products only.</li></ul> | groups and products with that term in the name or description, such as <b>Green Servers</b> (product group), <b>Green Server 3000</b> (product), and <b>Green Server 6000</b> (product). | with that term in the name or description, such as <b>Green Server 3000</b> , <b>Green Server 6000</b> , and <b>Green Server 9000</b> . |

## Show Immediate Child Products Only Option

In the Browse Catalog window, salespeople can browse product groups and products by selecting product groups. The Show Immediate Child Products Only option specifies whether to display only the products immediately within the selected product group, or also to display the products contained within the subgroups of the selected product group.

Here's how to use the Show Immediate Child Products Only option.

| Description                                                                                                                                                                                                                                                                  | Settings                                                                                                                                                                                                                                                                                                                                        | Example When Set to Yes                                                                                                                                                                                                                                                                                                 | Example When Set to No                                                                                                                                                                                                                                                                                                                                                                                      |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"><li>Determines whether the browse feature shows only products within the selected product group in the catalog, or to also show products within the subgroups of the selected product group.</li><li>The default setting is yes.</li></ul> | <ul style="list-style-type: none"><li>Yes: Browse shows only the products within the selected product group.</li><li>No: Browse also shows the products within the subgroups of the selected product group. If you're not using products in your catalog, only product groups, then this setting has no effect on the browse feature.</li></ul> | The product group <b>Servers</b> has no products within it, but its subgroups, <b>Green Servers</b> and <b>UltraPro Servers</b> , each have several products within them. The user clicks the <b>Servers</b> product group in the catalog browse pane. No products display in the Products section of the display page. | The product group <b>Servers</b> has no products within it, but its subgroups, <b>Green Servers</b> and <b>UltraPro Servers</b> each have several products within them. The user clicks the <b>Servers</b> product group in the catalog browse pane. The products contained within the <b>Green Servers</b> and <b>UltraPro Servers</b> product groups display in the Products section of the display page. |

## Understand Catalog Usage Option Modes

Before you set the usage options discussed here, be aware of the concept of "modes" for the catalog usage options. Each catalog usage option has a corresponding Mode value. The Mode setting lets you specify which application or applications the usage option applies to. If you leave the Mode value blank, then the usage option applies to all applications where the catalog is in use.

## Set the Search and Browse Options

Use these steps to set the sales catalog search and browse options.

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
  - Offering: Sales
  - Functional Area: Sales Catalog and Products
  - Task: Manage Product Group Usage
3. In the Product Group Usage list, select the **Base** usage.
4. In the Base: Details region, click the **Miscellaneous** tab.
5. Find the option in the list and set it as needed. For example, set Search Product Groups to Yes for the mode, Opportunity Management.

## 6. Save your changes.

### Related Topics

- [Overview of Sales Catalogs](#)
- [Sales Catalog High-Level Setup Steps](#)

## Filter Sales Catalog Display by Territory

You can configure whether the sales catalog displays only product groups and products within a user's sales territories, or if it displays all product groups and products defined in the catalog.

Furthermore, you can configure whether to have territory filtering off by default, and to let users turn the territory filter on or off.

In the sales catalog runtime UI, the territory filter appears as follows, if enabled:

- While browsing the catalog, users can select the **Filter by Territory** option in the Settings menu. For example, while editing an opportunity, a sales representative clicks **Browse Catalog** on the Products table, which launches the catalog where she can browse product groups and products. In the Settings menu, she enables the **Filter by Territory** option, to have the display of product groups and products limited to only those in her assigned territories.
- While searching for products or product groups, users can select the **Filter by Territory** check box. For example, while editing an opportunity, a sales representative searches in the products or product groups lists in the Product table. In the Select: Products or Product Groups pages, she enables the **Filter by Territory** check box, to have the display of product groups and products limited to only those in her assigned territories.

## Set Territory Filter Options

You set the territory filtering options in the product groups setup pages.

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to the following:
  - Offering: Sales
  - Functional Area: Sales Catalog and Products
  - Task: Manage Product Group Usage
3. Select the **Base** catalog in the upper portion of the page. (If your catalog uses a different usage, then select it.)
4. Click the **Functions** tab in the Details section of the page.
5. Click the **Value** drop-down list for the **Territory engine** option. If multiple applications have a **Territory engine** row, then select the row that has the application you want the filtering to apply to. The applications that can use the territory filtering functionality appear in the Mode column of the Functions tab. For example, click **Territory engine** for the Opportunity Management application shown in the Mode column.
6. Make your filtering selection, using the information in the following table.

| Option     | Description                                                                     |
|------------|---------------------------------------------------------------------------------|
| Do not run | Territory filtering is off. The Filter by Territory check box does not display. |

| Option                                | Description                                                                                                                                                            |
|---------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Enforce territory                     | Territory filtering is on, but is transparent to the user. The Filter by Territory check box does not display.                                                         |
| Display choice - checked by default   | Territory filtering is on. The territory filter check box is displayed and checked by default. The user can deselect the check box to disable the territory filtering. |
| Display choice - unchecked by default | Territory filtering is off. The territory filter check box is displayed and deselected by default. The user can check the check box to enable the territory filtering. |

7. Click **Save and Close**.

#### Related Topics

- [Sales Catalog High-Level Setup Steps](#)
- [Overview of Sales Catalog Usages](#)
- [Overview of Setting Sales Catalog Options and Actions](#)

## Overview of Setting Up Additional Product Information

When a user browses the product catalog, selects a product, and drills down into the product details, the application displays more tabs with additional information. These tabs are considered related items of that item that the user is viewing. You set up all of the related information in Product Information Management (PIM).

The related item tabs are:

- Details and Specifications: Populated from the PIM Long Description field
- Similar Products: Products with a relationship type of Substitute
- Service Products: Products with a relationship type of Service
- Included Warranty: Products with a relationship type of Warranty
- Accessories: Products with a relationship type of Accessories

Here are the high-level steps to add content to these tabs. For complete information, start with the *Item Specifications and Attributes* topic in the *Using Product Master Data Management* guide.

1. Sign in as a setup user.
2. From the Manage Items task in the Product Information Management UI, search for an item and edit it.
3. Navigate to the **Relationships** tab.
4. Search for and add the related items.
5. Save your changes.

**Note:** You can't show custom fields for the Product object in the Browse Catalog UI.

## Disable Sales Catalog Product Group Display

You can hide sales catalog product group hierarchy nodes in the runtime UI if you don't want users to see or select them.

By default, nodes of the product group hierarchy can be seen and selected by users in the product group list of values and in the browse view of the catalog.

After you set the option to hide product group hierarchy nodes in the runtime UI, the UI changes as follows:

- In the opportunity Products table, when a user selects a the list of values to select a product group, product groups do not display.
- In browse catalog view, the product groups display but cannot be selected.

For more information about creating and editing product groups, see the [Creating the Sales Catalog: Getting Started](#) topic.

### Disable Group Nodes During Creation or Editing

You can hide a product group and its child product groups from displaying in the runtime UI by deselecting the **Allow Selection** check box while creating or editing the group in the product groups pages.

Here's how you hide a product group and its child product groups:

1. In Setup and Maintenance, go to:
  - Offering: Sales
  - Functional Area: Sales Catalog and Products
  - Task: Manage Product Groups
2. If you're creating a product group, click the create icon and fill in the require fields. Be sure to deselect the **Allow Selection** check box.
3. If you're editing a product group, select the product group and lock it for editing.
4. Deselect the **Allow Selection** check box.
5. Click **Save and Close**.

### Disable Groups Nodes

You also can configure the display of product group hierarchy nodes using **Enforce product group selection** option available in the Miscellaneous tab of the Product Group Usages page.

Here's how:

1. In Setup and Maintenance, go to:
  - Offering: Sales
  - Functional Area: Sales Catalog and Products
  - Task: Manage Product Group Usage
2. Select the **Base** catalog in the upper portion of the page. (If your catalog uses a different usage, then select it.) In the Details region of the page, the Product Groups tab shows the catalogs associated with the usage you have selected.

3. To have the settings apply to a particular product node (or catalog), optionally, in the Product Groups tab, select the product group before making the changes in the other tabs.
4. Click the Miscellaneous tab and modify the **Enforce product group selection** option.
  - A setting of **yes** means that the product groups are disabled in the product selection list of values and in the browse catalog view.
  - A setting of **no** means that the product groups are not disabled.
5. Click **Save and Close**.

#### Related Topics

- [Sales Catalog High-Level Setup Steps](#)
- [Overview of Sales Catalog Usages](#)
- [Overview of Setting Sales Catalog Options and Actions](#)

## Let Salespeople Sort the Sales Catalog Alphabetically

Salespeople browsing the sales catalog can sort products and product groups alphabetically after you set a profile option.

Enable the sorting by setting the profile option, Default Sort By Behavior in Browse (ORA\_QSC\_SORT\_BY\_NAME), to yes in Setup and Maintenance:

1. In Setup and Maintenance, go to the following:
  - Offering: Sales
  - Functional Area: Sales Catalog and Products
  - Task: Manage Product Group Profile Option Values
2. Search for the profile option and set it to yes.
3. Click **Save and Close**.

## Set Performance-Tuning for Opportunity Products Search

By setting a profile option, you can enable or disable the smart list in the Product list of values in the Products table in opportunities. The smart list is a pre-fetched list of products.

For performance reasons, Oracle recommends that if you have more than 5,000 products in the application, then you should prevent the entire smart list from being pre-loaded when a user clicks the pre-loaded list.

As a user types, the application searches against the product smart-list entries. If the user clicks the drop-down list then the application initializes the complete smart-list. To disable the preload of the smart list, set the profile option Preload Territory-Filtered Product List Enabled (ZBS\_ENABLE\_PRODUCTLOV\_SMARTLIST) to No. By default, the profile option is set to yes.

### Set the Profile Option

Here's how to set the Preload Territory-Filtered Product List Enabled profile option.

1. In the Setup and Maintenance work area, go to:

- Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. In the Manage Administrator Profile Values page, search for and select the profile option name, Preload Territory-Filtered Product List Enabled, or the code, ZBS\_ENABLE\_PRODUCTLOV\_SMARTLIST.
  3. Set the profile option to No to disable the preload of the smart list.
  4. Save your changes.

#### Related Topics

- [How do I update existing setup data?](#)

## Enable the Catalog for Languages Other Than English

For users to be able to view the sales catalog in session languages other than English, you need to enable languages in the applications:

1. Sign in as a setup user and navigate to the **Security Console** in the Tools menu.
2. Click **Create Role** and create a new role with these details:
  - Role Name: Custom\_ProductOrgLang
  - Role Code: CUSTOM\_PRODUCTORGLANG
  - Role Category: CRM - Job Roles
3. Click **Next** until you get to the end of the train, and then click **Save and Close**.
4. In the **Security Console**, search for the role you just created and edit it.
5. In Function Security Policies, click **Add Function Security Policy**.
6. Search for the privilege, **Manage Item Keyword Search Organizations and Languages**, and add it to the role.
7. Click the **Users** train stop.
8. Click **Add User** and add the user to the new role.
9. Click **Next** until you get to the end of the train, and then click **Save and Close**.
10. You should receive a confirmation message that the changes were saved.
11. Next, navigate to **Scheduled Processes** in the Tools menu.
12. Click **Schedule New Process** and run these two processes:
  - Import User and Role Application Security Data
  - Retrieve Latest LDAP Changes

**Tip:** You may need to search for the processes in the search and select window available by clicking the **Search** link at the bottom of the Name list on the main search window.

13. After these jobs have completed, sign out and back in.
14. Go to the **Setup and Maintenance > Sales** offering.
15. Use the search from the right task drawer to open the task, **Manage Item Keyword Search Attributes**.
16. In the Indexed Organizations and Languages region, set up the languages as required.

For more information about setting up languages, see the related topics.

*Related Topics*

- [When do I create or edit ISO languages?](#)

## Catalog Use Case Examples

### Example of Creating a Sales Catalog

In this example, a Vision Corp. sells servers and is setting up the product catalog for the first time.

#### Create a Sales Catalog

1. Navigate to the Setup and Maintenance work area and select the **Sales** offering.
2. In the list of functional areas, click the **Sales Catalog and Products** area.
3. Select the **Manage Product Groups** task.
4. In the Manage Product Groups page, create a new product groups.
5. In the **Details** dialog window, enter the data shown in the following table.

| Field        | Sample Data                                        |
|--------------|----------------------------------------------------|
| Name         | VisionCatalog                                      |
| Display      | Vision Catalog                                     |
| Description  | Contains servers for enterprise sales.             |
| Root Catalog | Select this check box to make this a root catalog. |

6. In the Details tab, select the image that you want to display in this catalog.
7. In the Subgroups tab, create the following product groups, which are the categories for this product catalog.

| Field         | Sample Data                                                                                                                                            |
|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subgroup Name | <ul style="list-style-type: none"><li>○ Sentinel Power Server 1000</li><li>○ Sentinel Power Server 3000</li><li>○ Sentinel Power Server 6000</li></ul> |

8. Add more categories within some subgroups by switching from list to tree view and selecting the categories within which you want subgroups.

**Tip:** To show the catalog in hierarchy mode so that you can see the nesting of the product groups, click the hierarchy icon in the Manage Product Groups pane.

Add the following categories within subgroups.

| Parent Subgroup            | Sample Data                                                                                                                                            |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sentinel Power Server 1000 | <ul style="list-style-type: none"><li>○ Sentinel Power Server 1050</li><li>○ Sentinel Power Server 1100</li><li>○ Sentinel Power Server 1200</li></ul> |
| Sentinel Power Server 3000 | <ul style="list-style-type: none"><li>○ Sentinel Power Server 3050</li><li>○ Sentinel Power Server 3100</li><li>○ Sentinel Power Server 3200</li></ul> |
| Sentinel Power Server 6000 | <ul style="list-style-type: none"><li>○ Sentinel Power Server 6050</li><li>○ Sentinel Power Server 6100</li><li>○ Sentinel Power Server 6200</li></ul> |

9. In the **Products** tab, add products to all the subgroups that you created.
10. Click **Publish** to publish the product hierarchy that you just created.

A published catalog is available for use by different departments.
11. You must enable a sales catalog for use by associating it with the Base usage. To associate a published catalog with a particular usage, go to the Product Group Usage page and select the Base usage. Then, click the **Product Groups** subtab and select the catalog you just created.

#### Related Topics

- [Sales Catalog High-Level Setup Steps](#)

## Example of Reusing a Sales Catalog

This example demonstrates how you can reuse a sales catalog. After creating a catalog for a business that sells chairs and sofas, you get a call from another division of the company that wants a similar catalog with the same look-and-feel.

You find that this division needs the products in the Chair category of your existing catalog, so you can reuse this category instead of creating a new catalog.

**Note:** To complete this task, an application developer must create an application that can use the sales catalog task flows, just like sales uses the task flows provided by the sales catalog team.



## Prerequisite

You can select only product groups that are catalogs themselves. In other words, the catalog must be a root catalog. You realize the Chairs group is a category of your larger catalog, so you must make it a root catalog as a prerequisite to reusing the category.

1. On the Manage Product Groups page, in the product group list, select Chairs.
2. In the Details tab, select the Root Catalog check box.
3. Save and publish the catalog.

## Reuse the Sales Catalog

1. On the Manage Product Group Usage page, create a new usage and name it the Call Center Division usage.
2. Click the Product Groups subtab.
3. In the Manage Product Groups Usage page, add the product group Chairs to the new usage that you created.  
The Chairs catalog is now available for the Call Center Division.

## Example of Adding Filter Attributes to Product Groups

This example shows how to enable filtering by attributes in the sales catalog.

Use case: A business that sells furniture wants to provide filters in the catalog that let users narrow the product groups based on an attribute, such as color.

## Prerequisite

Before you perform this task:

- The filtering attributes must already be registered. You register attributes in the Manage Product Group Attributes page.
- The filtering attributes must be associated with the products in the item master.

## Filtering Product Groups by Attributes

1. In Setup and Maintenance go to the Sales offering.
2. In the list of functional areas, click the **Sales Catalog and Products** area.
3. Select the **Manage Product Groups** task.
4. In the Manage Product Group page, select a product group. For example, select the group named Chairs.
5. With the product group selected, click the **Lock** button.
6. Click the Filter Attributes tab.
7. In the Filter Attributes tab, click **New** to add a new attribute.
8. In the Create Filter Attribute dialog box, **Name** field, search for and select the filter attribute.  
For example, select the Color attribute.
9. Optionally, in the Create Filter Attribute dialog box, select the Advanced Search, Narrow By, and Sort By check boxes for the attribute, so that this attribute will be displayed in those regions at runtime.
10. Click **OK** in the Create Filter Attribute dialog box to save your changes.
11. In the Attribute Values area, add records and enter values for the attributes.  
For example, add Blue, Pink, and Black as the values for the chair color.

12. Unlock the group, save the changes, and publish the product group.

After publishing the product group, you validate the changes in the catalog. You can see the attributes that you created and their values in the Advanced Search, Narrow By, and Sort options of the catalog.

#### *Related Topics*

- [Sales Catalog High-Level Setup Steps](#)
- [Example of Creating a Sales Catalog](#)

## Catalog Troubleshooting

### Best Practices for Sales Catalog Setup

Sales catalog and product group setup can be quite complex. Therefore, be sure to follow the best practices described in this topic.

Here are the main best practice areas covered in this topic:

- Importing product groups
- Finding and entering reference numbers
- Checking your work before publishing or importing
- Locking and publishing product groups
- Associating the product group root with the Base usage
- Creating a new product group hierarchy
- Running a scheduled process after changing Base usage

### Import Product Groups

If your import file contains spelling and other errors, you can make your corrections in the same file and import again. The import process overwrites the existing entries.

### Find and Enter Reference Numbers

Unique product group reference numbers can be used to establish the relationships between parent and child product groups in some import spreadsheets. You can find the reference number in the Reference Number column in the Manage Product Groups page.

In your import spreadsheet, be sure any numbers are formatted as numbers (versus, for example, formulas), with zero digits to the right of the decimal. Otherwise, the import process can't recognize them. For example, generally, when you paste the reference number into a spreadsheet, the spreadsheet will automatically format it as something other than a plain number. In order for the import process to recognize the number as a number, you may need to explicitly format it as a number (with zero digits to the right of the decimal).

This figure shows an example of a reference number after being pasted into a spreadsheet cell (in the first highlighted box), and then the same reference number formatted as a number with no digits to the right of the decimal (in the

|   | A                         | B            | C        | D        |
|---|---------------------------|--------------|----------|----------|
| 1 | PGHeader Reference Number | PGHeader     | PGHeader | PGHeader |
| 2 | 3E+14                     | VisionCor US |          | Y        |
| 3 | PG1                       | GreenSen US  |          | Y        |
| 4 |                           |              |          |          |

|   | A                         | B            | C        | D        |
|---|---------------------------|--------------|----------|----------|
| 1 | PGHeader Reference Number | PGHeader     | PGHeader | PGHeader |
| 2 | 300000004059951           | VisionCor US |          | Y        |
| 3 | PG1                       | GreenSen US  |          | Y        |
| 4 |                           |              |          |          |

second highlighted box).

## Check Your Work Before Publishing or Importing

After you have published a product group, you can't delete it. You can only make it inactive. Thus, be sure to check your work before you publish the product groups you create in the UI and before you import. Importing publishes all unpublished product groups automatically, even those that aren't in your file.

1. Click on the root group name in the list and then click the tree view icon in the tool bar.
2. Check that the names are correct and that the hierarchy is set up as you want it.

## Lock and Publish Product Groups

Any product group you want to edit must be "locked". You lock a group by selecting it in the UI and then clicking the Lock button. When you lock a product group, no one else can make changes to it until it's unlocked again.

Any product group hierarchy you want to use in consuming applications must be published. Publishing is done by clicking on the root node of the group and then clicking the Publish button or when you import your product group data file. When you publish, the application publishes all product groups that are locked. If you don't want some groups to be published, then you must unlock them.

## Set Product Group Hierarchy Base Usage

The root product group you use for leads, opportunities, and territories must be assigned to a usage called "Base". You make this assignment in the Manage Product Group Usage page in Setup and Maintenance. Use the Manage Product Group Usage task to get to the page.

**Note:** The root product group must be published to be able to associate it with the Base usage.

## Create a New Product Group Hierarchy

If for some reason you don't want to use a product group hierarchy that you have created, you can always create a new root and subgroups, publish them, and associate the Base usage with the new product group root.

## Run a Scheduled Process After Changing Base Usage

Each time you make a new assignment of Base to a root product group, you must run the scheduled process Refresh Denormalized Product Catalog Table for BI. If you don't run the process, your product group hierarchy may not appear in

the consuming applications. Also, if you use future start or end dates for product groups, then you should schedule the refresh process periodically as well.

#### *Related Topics*

- [Sales Catalog High-Level Setup Steps](#)
- [Overview of Sales Catalogs](#)
- [Enable Salespeople to Browse the Catalog](#)
- [Add Products to the Catalog](#)
- [Validate the Sales Catalog](#)

## Why can't I see any products, product groups, or price books listed in the manage UI?

Navigate to **Sales and Service Access Management > Configure Groups > Object Sharing Rules**. Run the following checks:

- Check Access Group set up and ensure that the signed-in user has access to the object, either through predefined object sharing global rules or through custom access group rules (Assign Access Group).
- Make sure that the latest changes in the access group rules are published.
- If you're using a custom rule, ensure that you deactivate/disable the system global rule.

#### *Related Topics*

- [Use Access Groups to Secure Product, Product Group, and Price Book Data](#)

## FAQs for Sales Catalogs

### Frequently Asked Questions (FAQs) for Sales Catalogs

This section contains some frequently asked questions (FAQs) when setting up and maintaining sales catalogs. Scroll or search to find answers to common questions.

## What's the difference between the administration and published product group versions?

The administrator who defines the product group uses the administration version.

The user of the sales catalog sees the published version.

**Note:** When you publish the administration version, you make it available as the published version.

## What's a related group?

A related group shows the relationship between two different product groups. For example, you can see that a group with extended warranties for computers is related to a group with laptop computers. The application supports several relationship types, such as Revenue and Service.

## What's a rollup catalog?

Use a rollup catalog to create a hierarchy that feeds data to the forecast.

A sales catalog can have the same product group appear multiple times in its hierarchy. For example, the product group Toys can be part of the Children category as well as the Electronics category within the same catalog. However, in forecasts, each product appears only once, so the rollup catalog can't have the same product group appear multiple times in its hierarchy.

**Note:** The Allow Duplicate Children check box controls whether a product group can have duplicate child nodes.

## How can I change the labels for filter attributes at runtime?

In the Filter Attributes tab of the Manage Product Group page, change the value in the Display field for the attribute.

You can also create a user-friendly name to display at runtime. Let's say that an attribute name is Laptop Color. You can change its display name to Available Colors. The user-friendly name shows up in the Narrow By or Advanced Search options at runtime.

## How can I change sales catalog button labels?

You can change the default Add to Cart label, and you can select a different label, such as Add to Shopping Cart. On the Manage Product Groups page, select the Display Options tab and the Miscellaneous subtab.

Keep in mind that before you can select button label values, they must be values in the lookup type Add Item Label Values in the Manage Product Group Lookups page.

## How can I set exceptions for particular usages of product groups?

In the Manage Product Group Usage page, select a usage.

For example, select the Base usage. Click the product group in the Product Groups tab, select the usage in the Modes tab, and use the other tabs to specify the exceptions for this usage.

You can use this method to modify the appearance of a product group in minor ways for different uses. For example, you might want a product group to look slightly different when it's used for lead management and for campaign management.

## Why did some of the products in my published catalog disappear?

Products in your catalog are active for a specified period. Inactive products don't show up in a published catalog. You can activate products using the Products tab of the Manage Product Groups page.

## How can I check whether my catalog is used by other catalogs?

You can get this information from the Sharing region in the Manage Product Groups page. By default, all product groups can be shared.

## Why can't I modify a product group?

Lock a product group to modify it. Click Lock in the Manage Product Groups page. If the product group is locked by another user, then you can see the locked indicator and you can't modify the product group.

# 22 Leads

## Overview of Lead Management

Leads provide a way for your sales organization to capture the potential interest in your products. After your organization qualifies the information and determines the lead is worth pursuing, you turn it into an opportunity and the sales process begins in earnest.

Use the Contact time zone field to capture the preferred time zone of a contact pursued on your lead. The contact time zone is based on the contact address and helps you know the preferred time to call or email a prospect or customer. You can also use the functional who columns to capture the record history of a lead. The columns let you accurately report on leads that are imported from other systems.

Other lead management features help to align marketing and sales objectives from lead generation to lead execution. Lead information is generated from a variety of sources and captured from:

- A company's existing contacts
- Marketing campaigns

All leads then undergo the qualification and assessment process and are qualified either manually by a salesperson or automatically based on predefined rules. Finally, qualified leads are converted into opportunities.

### *Related Topics*

- [How Lead Components Work Together](#)

## Implementation Concepts for Leads

### Considerations for Implementing Lead Management

This topic lists some of the considerations to take into account when planning your implementation of the lead management feature. No setup tasks are mandatory for this feature.

You can manage the necessary configuration, integration, and metadata settings through profile options and lookups to tailor lead management functionality to match your business requirements.

### Job Roles and Associated Duty Roles

The Sales Lead Processing Duty gives access to all the underlying processing duties and processing tasks. The Sales Lead Qualification duty provides access to all underlying qualification duties and qualification tasks.

### Profile Option Decision Points

Profile options are configurable options that affect application operations. This table outlines some of the decision points that you must consider and the associated profile option that you access to make the appropriate change:

| Decision Question                                                                                                                                   | Profile Option                                                                                                                                                                                                                                                                                                                            |
|-----------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Which assignment rules do you want to use to assign individual resources to the lead sales team?                                                    | Lead Assignment Mode<br>Assignment Rule for Rule-Based Lead Assignment                                                                                                                                                                                                                                                                    |
| Which assignment rules do you want to use to assign a territory team to a lead?                                                                     | Assignment Rule for Territory-Based Lead Assignment<br>Assignment Rule for Rule-Based Lead Assignment                                                                                                                                                                                                                                     |
| Which lead ranking rules do you want to use?                                                                                                        | Assignment Rule for Ranking Leads                                                                                                                                                                                                                                                                                                         |
| Which lead qualification rules do you want to use?                                                                                                  | Assignment Rule for Qualifying Leads                                                                                                                                                                                                                                                                                                      |
| Which leads scoring rules do you want to use?                                                                                                       | Assignment Rule for Scoring Leads                                                                                                                                                                                                                                                                                                         |
| Do you want to display the assessment tab in the Edit Lead page?                                                                                    | Lead Assessment Enabled                                                                                                                                                                                                                                                                                                                   |
| Which assessment template do you want to use for lead qualification?                                                                                | Lead Assessment Template Default<br>Advanced Lead Qualification Enabled<br>Lead Qualification Template                                                                                                                                                                                                                                    |
| How many days should you look back when querying leads in Search?                                                                                   | Lead Query Maximum Number of Days<br>Lead Query Default Number of Days<br>Lead Query Warning Threshold Number of Days                                                                                                                                                                                                                     |
| Do you want to set the maximum number of leads that can have mass update applied in one user action?                                                | Mass Update Threshold Value<br><br><b>Note:</b><br>The ZBS_MASS_UPDATE_THRESHOLD (Mass Update Threshold Value) profile option specifies the maximum number of records that can be updated in one user action. For Leads, the maximum number of records that can be updated at once is 500. The default value of the profile option is 25. |
| Do you want users to be able to add or edit products to leads?                                                                                      | Add and Edit Products to Leads Enabled                                                                                                                                                                                                                                                                                                    |
| Do you require additional search criteria, other than creation date, when searching across all leads, or for searches relying on hierarchy rollups? | Require Additional Criteria for Lead Search Enabled                                                                                                                                                                                                                                                                                       |



| Decision Question                                                                                | Profile Option                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Do you want to set context-based data security policies for improved performance of lead search? | <p>Lead Search Context-Based Data Security Enabled</p> <p><b>Note:</b><br/>If you enable this option, then you must also ensure that the filters in the Lead Overview page, such as My Leads, My Subordinate Leads and so on have the required access in Security Console. Otherwise, your lead data search won't return expected results.</p> |

## Lookup Decision Points

Lookups enable quick selection from drop-down lists. Lookups associated with lead management capabilities are incorporated into its application to speed the process of entering data into forms. You might want to change or add some of the values that are used in the lookup tables. Some of the values you can change include:

| Lookup                   | Description and Values                                                                                                                                                                                                                              |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lead Retire Reason       | <p>Possible reasons for retiring leads. Retired leads are considered closed leads. Values include:</p> <p>Duplicate lead or No purchase interest Lead</p>                                                                                           |
| Reject Reason            | <p>Possible reasons specified for rejecting leads. Rejected leads can be reassigned or retired. Values include:</p> <p>Duplicate lead, Failed to reach contact, and Incorrect data</p>                                                              |
| Lead Time Frame          | <p>Lead cycle duration that usually coincides with a typical sales cycle duration for products and services offered. Values include:</p> <p>3 months, 6 months, 9 months, 12 months, 15 months, and 18 months</p>                                   |
| Lead Reassignment Reason | <p>Possible reasons specified for reassigning leads. Values include:</p> <p>No activity, Other, and Workload</p>                                                                                                                                    |
| Lead Rank                | <p>Lead rank values used as a measure of lead quality and prioritization. Values include:</p> <p>Cool, Hot, and Warm</p>                                                                                                                            |
| Lead Source Channel      | <p>Source channel responsible for lead generation. Values include:</p> <p>Direct mail, E-mail, Fax, Marketing Cloud, Phone, Campaign, Sales visit, Social, Company website, Wireless message, Model-based prediction, and Rule-based prediction</p> |

### Related Topics

- [Sales Lead Profile Options](#)
- [Example of Defining a Sales Lead Qualification Template](#)
- [Lead Qualification Templates](#)
- [How can I define the automatic assignment of Lead team resources?](#)

## How Lead Components Work Together

The lead life cycle includes an automated process that captures leads and then prioritizes them for sales engagement through a scoring and ranking process. Leads are distributed to appropriate sales resources for further lead qualification, follow-up, and conversion.

A sales lead cycle ends when salespeople convert a lead to an opportunity or when they retire a lead. A lead is retired if no possibility exists for converting the lead to an opportunity.

### Lead Life Cycle

Leads are automatically monitored for sales representative acceptance. Unaccepted or rejected leads are reassigned as appropriate. The quality of the lead is continuously reviewed and adjusted by the lead owner at different stages of the lead life cycle. The lead owner can be a marketing resource or a sales resource, depending at what stage the lead is at in its life cycle. The lead life cycle is captured in the following sections:

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

### Lead Generation

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

- Campaign responses
- Third-party lead sources

Flexible lead import, customer and contact creation, and deduplication ensure that sales lead generation efforts are optimized. For example, the lead import process checks whether leads represent new or existing customers. For new customers, data must be created for the lead. If the lead is an existing customer, then part of the lead import process checks to ensure customer and lead information isn't duplicated.

### Lead Qualification

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

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

## Lead Distribution

As the qualification of leads progresses into real potential prospects, assignment manager uses expression-based rules to associate one or more internal sales representatives with each lead. If the lead is associated with either a sales prospect or a sales account, then assignment manager uses territory definitions to associate (typically one) internal territory with each lead. The sales representative newly assigned to the lead can be related to the lead record directly through the lead team or indirectly through a territory associated with the lead. The sales representatives can view and update those leads assigned to them in the lead work area and can claim ownership of the lead by accepting the lead.

Other assigned resources can view and update the lead, but they can't make themselves the owners. If a sales prospect changes to a sales account by adding an address, assignment manager is automatically called during the next automated assignment cycle. Depending on the assignment logic, the lead can be reassigned to a different territory or sales resource. If the assigned sales representative takes no action on a lead for several days, then the lead can be manually reassigned to another sales representative.

## Lead Assessment

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

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

You use the lead assessment feature to assess leads. Predefined questions help determine the likelihood of the lead being accepted by Sales. For example, you're a sales representative and you ask the customer a series of questions created by Marketing and Sales to assess the quality of the lead. You record the answer of each question and the lead assessment tool automatically factors the answer into the assessment score of the lead. At the end of the call, you note that the assessment lead score is high, so you request that the lead is assigned to the direct sales team. If the lead score was low, then you might want to retire the lead. If the lead needs qualifying, then you can decide to leave it in your list of leads for follow-up. Finally, if the lead is good, but the potential revenue opportunity is less than a predetermined monetary amount, for example, twenty-five thousand dollars, then you can convert the lead to an opportunity to pursue as part of the sales cycle.

## Lead Conversion

After establishing that the lead has potential, the sales representative can convert the lead to an opportunity. You can schedule meetings and presentations with your lead contact to move the opportunity along the sales pipeline. To track the progress of the lead, you can capture contact notes and associate them with the contact and opportunity.

**Note:** Administrators can write a validation rule to check if there's more than one lead attached to an opportunity. For example, using a Groovy script, you can restrict the creation of another opportunity from a lead. To learn more about writing validation rules and scripts, see the Groovy Tips and Techniques chapter in the Groovy Scripting Reference guide, and the Groovy Scripts chapter in the Configuring Applications Using Application Composer guide.

As the lead progresses through its life cycle, decisions to retire the lead are based on reasons such as:

- You can't verify the customer and lead details.
- The customer isn't interested in pursuing the lead any further.

## Expose New Account and New Contact Fields for Leads

Lead Management supports both net new leads, where salespeople manually enter the contact and account names, and repeat business leads.

For repeat business leads, salespeople search for and select existing accounts and contacts to assign to leads. If your business uses net new leads where contact and account values are entered manually using free form text fields, then you can make the New Account and New Contact fields available on the Leads UI through Application Composer. These fields are hidden by default so to use them for your new leads, you must manually unhide these fields. If the new lead that you enter gets converted to an opportunity, the details become available as existing account or contact information.

You can expose the **New Account** and **New Contact** fields for these Lead pages:

- Create Lead
- Edit Lead
- Convert Lead
- Mass Convert Lead
- Lead List Page

Here's how to expose the **New Account** and **New Contact** fields in Lead pages:

**Note:** There are two standard **Existing Account** DCL fields. You can only update the Account field with the API name **AccountName**. The other existing account name has the API name of **ExtnAccountName** and can't be updated.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Sales Lead**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.
8. In the **Available Fields** pane, select the **New Account** field and move it to the **Selected Fields** pane. Repeat this step for the **New Contact** field.
9. Use the Selected Fields pane directional arrows to position the New Account and New Contact fields as required.  
**Note:** You can position the fields to group the New Account and New Contact fields with the Existing Account and Existing Contact fields. Salespeople can enter an account or contact in the new or the existing fields, but not both.
10. Click **Save and Close**.

11. Repeat this procedure for all standard and customer-defined layouts on which you want to add the New Account and New Contact fields.
12. Test the changes: Navigate to **Sales > Leads** as a user with access to the leads pages, for example, as a salesperson. Edit a lead and ensure you can see the New Account and New Contact field.
13. Publish the sandbox.

**Note:** If you want automatic email notifications sent to the new contact about activities, such as appointments, created for this lead, then see the related topic, [Send Automatic Emails to New Lead Contacts](#).

#### Related Topics

- [Send Automatic Emails to New Lead Contacts](#)
- [Add the New Account and New Contact Fields to the UI](#)

## Sales Lead Profile Options

Profile options are configurable options that affect application operations. Values defined at the user level take precedence over those at the site level. If a value isn't defined at the user level, the site level value is used.

The effect of setting each of the sales leads profile options are described under these sections:

- Lead Assignment
- Lead Qualification and Assessment
- Lead Update and Attribute Mapping
- Partner Leads and Deal Registrations
- Lead Searches

### Lead Assignment

This table lists the profile options that affect the assignment of lead status, rank, score, resources, and territories on the lead. Before setting these profile options, you must perform the tasks listed under [Configure Assignment Manager for Lead Processing setup task](#). From there you can review and update assignment of candidate objects such as rank, qualification status, and resources to leads.

| Profile Option Display Name                                                        | Default Value | Effect                                                                                        |
|------------------------------------------------------------------------------------|---------------|-----------------------------------------------------------------------------------------------|
| Assignment Rule for Qualifying Leads (MKL_LEAD_ASSIGNMENT_QUAL_RULE)               | None          | Specify the rule to evaluate the lead and assign the lead status per rule conditions.         |
| Assignment Rule for Ranking Leads (MKL_LEAD_ASSIGNMENT_RANK_RULE)                  | None          | Specify the rule to evaluate the lead and assign the lead rank per rule conditions.           |
| Assignment Rule for Rule-Based Lead Assignment (MKL_LEAD_ASSIGNMENT_MATCHING_RULE) | None          | Specify the rule to evaluate the lead and assign the sale team resources per rule conditions. |
| Assignment Rule for Scoring Leads (MKL_LEAD_ASSIGNMENT_SCORE_RULE)                 | None          | Specify the rule to evaluate the lead and assign a score per rule conditions.                 |

| Profile Option Display Name                                                    | Default Value | Effect                                                                                                                                                                        |
|--------------------------------------------------------------------------------|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assignment Rule for Territory-Based Lead Assignment (MKL_LEAD_ASSIGNMENT_RULE) | None          | Specify the rule to evaluate the lead and further filter territories derived using territory-based assignment per rule conditions.                                            |
| Lead Assignment Mode (MKL_LEAD_DEFAULT_ASGN_MODE)                              | Both          | Specify the default assignment mode type allowed during on-demand or automatic lead assignment. On-demand assignment occurs when you select the assign lead action in the UI. |
| Lead Batch Reassignment (MKL_LEAD_BATCH_ASSIGNMENT)                            | N             | Enable batch lead reassignment, in addition to lead automatic reassignment.                                                                                                   |

## Lead Qualification and Assessment

This table lists the profile options that affect the qualification and assessment of leads. Before setting these profile options, you must perform the tasks listed under Configure Assessment Reference Data for Leads setup task. From there you define and manage the setup for configuring templates used for assessing and qualifying sales objects.

| Profile Option Display Name                                                               | Default Value | Effect                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------------------------------------------------------------------|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lead Assessment Enabled (MKL_LEAD_ASSESSMENT_TEMPLATE)                                    | None          | Enable the display of Qualification, a tab containing the sets of predefined questions and answers collected to assist in evaluating the lead.                                                                                                                                                                                                                                                              |
| Advanced Lead Qualification Enabled (MKL_LEAD_QUALIFICATION_TEMPLATE_PROFILE)             | None          | Enable advanced lead qualification by specifying the template name to display the collection of questions, possible answers, and questionnaire feedback.                                                                                                                                                                                                                                                    |
| Enable Multiple Assessments Per Qualification Template (MOW_MULTIPLE_ASSESSMENTS_ENABLED) | No            | Enable the ability to perform multiple qualifications for the same lead qualification template by setting the value to Yes. This setting isn't enabled by default.                                                                                                                                                                                                                                          |
| AI Update Who Columns Threshold (ORA_ZCA_AI_UPDATE_WHO_THRESHOLD)                         | 5             | Specifies the percentage threshold value that tracks both the AI Lead Score field for Leads and the Predictive Win Probability field for Opportunities. The profile option is set to 5 percent by default. If the score in either of these fields exceeds the percentage threshold value specified in the profile option, then the Last Updated Date field gets updated for the lead or opportunity record. |

## Lead Update and Attribute Mapping

This table lists the profile options that affect the update of leads and lead-to-opportunity attribute mapping.

| Profile Option Display Name                                               | Default Value                      | Effect                                                                                                                                                                               |
|---------------------------------------------------------------------------|------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Add and Edit Products to Leads Enabled (MKL_LEAD_PRODUCTS_ENABLED)        | Y                                  | Enable the ability to add or edit products to leads. The ability to add or edit product groups to leads is enabled by default.                                                       |
| Use Default Lead Notification Process (MKL_LEAD_OOTB_NOTIFICATION)        | N                                  | Specify whether default lead notification business process should be used. Set Yes for default process, and No for user-defined process or if no notification is intended.           |
| Create Account and Contact from Lead (ORA_MKL_LEAD_ACT_CON_CREATE)        | Both                               | Enable the default setting for the creation of an account, a contact, both an account and a contact, or none during lead conversion. The default value is to create both.            |
| Direct Lead to Opportunity Mapping (MKL_DIRECT_LEAD_TO_OPTY_MAPPING_NAME) | Copy Lead To Opportunity Map       | Specify the mapping file name created in <b>Application Composer, Copy Maps</b> . This file is used to map objects and attributes when a direct lead is converted to an opportunity. |
| Lead to Account Mapping (MKL_LEAD_TO_ACCOUNT_MAPPING_NAME)                | Standard Copy Lead To Account Map  | Specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of an account when converting a lead to an opportunity.                |
| Lead to Contact Mapping (MKL_LEAD_TO_CONTACT_MAPPING_NAME)                | Standard Copy Lead To Contact Map  | Specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of a contact when converting a lead to an opportunity.                 |
| Lead to Deal Registration Mapping (MKL_LEAD_TO_DEAL_MAPPING_NAME)         | Copy Lead To Deal Registration Map | Provides the mapping file name to be used to copy attributes while converting a Lead to a Deal Registration.                                                                         |

## Partner Leads and Deal Registrations

This table lists the profile options that affect sales partner leads, deal registrations, and deal assignments.

| Profile Option Display Name                                                             | Default Value | Effect                                                                                                                                                              |
|-----------------------------------------------------------------------------------------|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Partner Contact Addition Enabled (MKL_ADD_PARTNER_CONTACT)                              | Y             | Specify whether to automatically add the primary partner contact to the lead team when a partner contact is added to the lead. The default value is Y.              |
| Lead Registration Approval Administrator (MKL_LEAD_REGISTRATION_APPROVAL_ADMIN_PROFILE) | None          | Select the recipient of notifications when an approver can't be determined, who's qualified to respond to the notification, and can modify approval configurations. |

| Profile Option Display Name                                                                                | Default Value                             | Effect                                                                                                                                                                                                                                                                          |
|------------------------------------------------------------------------------------------------------------|-------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Deal Registration Expiration Days (MKL_DEAL_REG_EXPIRATION_DATE)                                           | 90                                        | Specify the number of days, after the deal registration creation date, used to derive the deal registration expiration date.                                                                                                                                                    |
| Resource Sales Team Access Level Default for Deal Registration ( MKL_DEAL_DEFAULT_SALES_TEAM_ACCESS_LEVEL) | 200                                       | Specify the default access level for resources added to the deal registration sales team.<br><br>The following values represent the access levels for the team: <ul style="list-style-type: none"> <li>• 100 = View Only</li> <li>• 200 = Edit</li> <li>• 300 = Full</li> </ul> |
| Deal Registration Query Default Number of Days (MKL_DEAL_SEARCH_LAST_UPDATED_RANGE_DEFAULT)                | 90                                        | Specify the default number of days used to derive the last updated date range when searching for deal registrations.                                                                                                                                                            |
| Partner Lead to Opportunity Mapping (MKL_PARTNER_LEAD_TO_OPTY_MAPPING_NAME)                                | Copy Lead To Opportunity Map              | Specify the mapping file name created in <b>Application Composer, Copy Maps</b> . This file is used to map objects and attributes when a partner lead is converted to an opportunity.                                                                                           |
| Deal Registration to Opportunity Mapping (MKL_DEAL_TO_OPTY_MAPPING_NAME)                                   | Copy Deal Registration To Opportunity Map | Specify the mapping file name to be used to copy attributes while converting a Deal Registration to an Opportunity.                                                                                                                                                             |
| Assignment Rule for Rule-Based Deal Assignment (MKL_DEAL_RBA_RULESETGROUP)                                 | None                                      | Specify the assignment rule that assigns resources to deal registrations. Resource members are added to the deal registration team.                                                                                                                                             |
| Assignment Rule for Territory-Based Deal Assignment (MKL_DEAL_TBA_RULESETGROUP)                            | None                                      | Specify the assignment rule that assigns territories to Deal Registrations. Territory members are added to the deal registration team.                                                                                                                                          |
| Deal Registration Assignment Mode (MKL_DEAL_DEFAULT_ASGN_MODE)                                             | ORA_RBA                                   | Specify the default assignment mode used during deal registration assignment. The mode is set to rule-based assignment mode.                                                                                                                                                    |
| Advanced Lead Qualification Enabled - Indirect Leads (MKL_PARTNER_LEAD_QUALIFICATION_TEMPL)                | None                                      | Specify a default template to enable lead qualification for partner sales channel and display questions, possible answers, and questionnaire feedback in the Edit Lead user interface.                                                                                          |
| Days Prior to Deal Registration Expiration (MKL_DEAL_SEARCH_EXPIRE_RANGE_DEFAULT)                          | 30                                        | Specify the number of days prior to expiration that deal registrations must be included in the predefined saved search. 30 days is the default value.                                                                                                                           |



| Profile Option Display Name                                                                  | Default Value | Effect                                                                                                                                                           |
|----------------------------------------------------------------------------------------------|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Deal Registration Default Approver (MKL_DEFAULT_DEAL_REGISTRATION_APPROVER)                  | None          | Select the recipient of notifications when an approver can't be determined, who's qualified to respond to the notification, and can approve deal registrations.  |
| Use Default Deal Registration Approval Business Process (MKL_DEAL_USE_DEFAULT_APPROVAL_PROC) | Y             | Specify whether the default deal registration approval business process should be used. The default value is set to Y. Set to No for customer-defined processes. |

## Lead Searches

This table lists the profile options used to manage sales lead searches.

| Profile Option Display Name                                                              | Default Value | Effect                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------------------------------------------------------------------------------|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lead Query Maximum Number of Days (MKL_LEAD_QUERY_IN_N_DAYS)                             | 360           | Specify the maximum number of days allowed when searching leads based on the creation date range.<br><br>The value for the maximum number of days must be a positive number. If the value isn't a positive number or left blank, the value of 360 days is used.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Lead Query Default Number of Days (MKL_LEAD_SEARCH_CREATION_RANGE_DEFAULT)               | 90            | Specify the default number of days used to derive the creation date range for searching leads. The search criterion is derived by using the current date for the creation end date value and the profile option to derive the creation start date value.<br><br>For example, if you want leads for the last 15 days to be the default query action, then set the profile value to 15. The default creation date search criteria will have an end date for the current date and the start date will be 15 days prior to the current date. The values can be overridden in the search criteria.<br><br>The value for the default number of days must be a positive number. If the value isn't a positive number or left blank, the value of 30 days is used.<br><br>This profile option can be defined at both the site and user levels. |
| Lead Query Warning Threshold Number of Days (MKL_LEAD_SEARCH_CREATION_RANGE_RECOMMENDED) | 180           | Specify the number of days for the lead creation date search criteria before issuing an alert to the user.<br><br>To disable the warning, delete the profile option value.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |

| Profile Option Display Name                                                       | Default Value | Effect                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------------------------------------------------------|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lead Search Context-Based Data Security Enabled (MKL_LEAD_CDS_ENABLED)            | N             | Enable context-based data security policies for improved performance of lead search. The default value is set to N.<br><br><b>Note:</b><br>If you enable this option, then you must also ensure that the filters in the Lead Overview page, such as My Leads, My Subordinate Leads and so on have the required access in Security Console. Otherwise, your lead data search won't return expected results. |
| Require Additional Criteria for Lead Search Enabled (MKL_SRCH_ADDL_CRITERIA_REQD) | N             | Enable additional search criteria, other than creation date, when searching across all leads, or for searches relying on hierarchy rollups.                                                                                                                                                                                                                                                                |

#### Related Topics

- [Sales Lead Lookups](#)
- [Overview of Scheduling Lead Processing Activities](#)

## Sales Lead Lookups

Lookups enable quick selection from drop-down lists and are incorporated into the lead management capability to speed the process of entering data into forms. They are also used in applications to represent a set of codes and their translated meanings.

For example, a product team might store the values 'Y' and 'N' in a column in a table. When displaying those values they would want to display "Yes" or "No" (or their translated equivalents) instead. Each set of related codes is identified as a lookup type.

### Lead Lookups

Lookup types are classified using tasks that involve a group of related lookups, such as Manage Sales Leads Standard Lookups. Each task gives you access only to certain lookup types. Use the **Manage Sales Lead Standard Lookups** task from the **Setup and Maintenance** work area to access the lookup types related to leads. Generic tasks provide access to all lookup types of a kind, such as all common lookups that are associated with the Manage Common Lookups task.

**Note:** If the lookups in an application are available in the standards, common, or set-enabled lookups view, they're central to an application and can be easily managed. However, lookups defined in a specific application view can only be managed by following instructions provided by that application.

This table displays lead lookup names (called lookup types in the application), their values, and their descriptions.

| Lookup Type                                                         | Lookup Values                                                                                                                                  | Description                                                                                                                                                                                                                                                    |
|---------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Lead Access Level (MKL_ACCESS_LEVEL)                                | <ul style="list-style-type: none"> <li>Full</li> <li>View only</li> </ul>                                                                      | <p>Specifies the access level of team members for actions they can perform on specific sales leads.</p> <p>Full access level allows the user to update the team by adding or removing individual resources or by updating the access level for any member.</p> |
| Lead Acceptance Status (MKL_LEAD_ACCEPTED_FLAG)                     | <ul style="list-style-type: none"> <li>No</li> <li>Yes</li> </ul>                                                                              | Status that indicates whether or not a lead is accepted by sales departments.                                                                                                                                                                                  |
| Lead Assignment Mode (MKL_LEAD_ASGNT_STATUS_CODE)                   | <ul style="list-style-type: none"> <li>Both</li> <li>Rule-based assignment</li> <li>Territory-based assignment</li> </ul>                      | Determines whether lead assignment is based on rule-based, territory-based, or both types of rules.                                                                                                                                                            |
| Lead Assignment Process Type (MKL_ASGN_JOB_TYPE)                    | <ul style="list-style-type: none"> <li>Assignment</li> <li>Qualification</li> <li>Ranking</li> <li>Scoring</li> </ul>                          | Lead processing types supported by Assignment Manager.                                                                                                                                                                                                         |
| Lead Assignment Status (MKL_LEAD_ASGNT_STATUS_CODE)                 | <ul style="list-style-type: none"> <li>Assigned</li> <li>Reassigned</li> <li>Rejected</li> </ul>                                               | Assignment status indicating whether sales team resources are assigned.                                                                                                                                                                                        |
| Lead Display in Simplified Pages (MKL_FUSE_DASHBOARD_DISPLAY)       | <ul style="list-style-type: none"> <li>Leads</li> </ul>                                                                                        | Enable the display of leads in the simplified pages dashboard.                                                                                                                                                                                                 |
| Lead Processing Activity Progress Status (MKL_LEAD_SCHEDULE_STATUS) | <ul style="list-style-type: none"> <li>Completed</li> <li>Completed with error</li> <li>New</li> <li>In progress</li> <li>Scheduled</li> </ul> | Progress details indicating lead current and end processing status.                                                                                                                                                                                            |
| Lead Processing Activity Schedule Mode (MKL_LEAD_SCHEDULE_MODE)     | <ul style="list-style-type: none"> <li>Immediate</li> <li>Schedule date</li> <li>Repeats</li> </ul>                                            | Scheduling options for lead processing activities.                                                                                                                                                                                                             |
| Lead Processing Repeat Frequency (MKL_WAIT_LAG_UNITS)               | <ul style="list-style-type: none"> <li>Days</li> <li>Months</li> <li>Weeks</li> <li>Years</li> </ul>                                           | The time intervals between lead processing activities.                                                                                                                                                                                                         |
| Lead Process Scheduling Operators (MKL_SCH_OPERATORS)               | <ul style="list-style-type: none"> <li>Equal to</li> <li>Greater than</li> </ul>                                                               | Operators used for lead processing scheduling options.                                                                                                                                                                                                         |

| Lookup Type                                                  | Lookup Values                                                                                                                                                                                                                                                             | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                              | <ul style="list-style-type: none"> <li>Greater than or equal to</li> <li>Less than</li> <li>Less than or equal to</li> </ul>                                                                                                                                              |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Lead Reassignment Status (ORA_MKL_LEAD_REASSIGN_STATE)       | <ul style="list-style-type: none"> <li>N</li> <li>R</li> <li>T</li> <li>Y</li> </ul>                                                                                                                                                                                      | <p>Reassignment status values for leads reassigned only by Territory Based Assignment or Resource Based Assignment jobs.</p> <p>The Reassign indicator is set to:</p> <ul style="list-style-type: none"> <li>N when lead is processed by Lead Assignment Job</li> <li>R when Lead Resource Based Assignment is completed by Lead Assignment Job</li> <li>T when Lead Territory Based Assignment is completed by Lead Assignment Job</li> <li>Y for processing lead in Lead Assignment Job</li> </ul> |
| Lead Registration Approval Status (MKL_DEAL_APPROVAL_STATUS) | <ul style="list-style-type: none"> <li>Approved</li> <li>Pending approval</li> <li>Rejected</li> <li>Submitted</li> </ul>                                                                                                                                                 | Approval status for leads registered by partners.                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Lead Registered Status (MKL_LEAD_REGISTERED)                 | <ul style="list-style-type: none"> <li>No</li> <li>Yes</li> </ul>                                                                                                                                                                                                         | Status that indicates whether or not a partner lead is registered.                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Lead Search Filter Record Sets (MKL_LEAD_SRCH_GROUP)         | <ul style="list-style-type: none"> <li>All records I can see</li> <li>Records in my territory hierarchy</li> <li>Records in my territory</li> <li>Records I own</li> <li>Records where I am on the team</li> <li>Records where my subordinates are on the team</li> </ul> | <p>Record visibility filters for lead search.</p> <p><b>Note:</b><br/>Record sets involving subordinates, which are resources within an organization or a line manager's hierarchy, are available only to managers.</p>                                                                                                                                                                                                                                                                              |
| Lead Status (MKL_LEAD_STATUS)                                | <ul style="list-style-type: none"> <li>Converted</li> <li>Qualified</li> <li>Retired</li> <li>Unqualified</li> </ul>                                                                                                                                                      | Lead status values based on specific actions performed on a lead. Used to mark the milestones in the lead life cycle.                                                                                                                                                                                                                                                                                                                                                                                |
| Lead Retire Reason (MKL_RETIRE_REASON_CD)                    | <ul style="list-style-type: none"> <li>Duplicate lead</li> <li>No purchase interest</li> </ul>                                                                                                                                                                            | Possible reasons for retiring leads. Retired leads are considered closed leads.                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Lead Yes or No Indicator (MKL_YES_NO_REVERSE)                | <ul style="list-style-type: none"> <li>Yes</li> <li>No</li> </ul>                                                                                                                                                                                                         | Generic status that indicates yes or no with reverse meanings.                                                                                                                                                                                                                                                                                                                                                                                                                                       |

| Lookup Type                                                            | Lookup Values                                                                                         | Description                                                                                                                                                                             |
|------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Recommended Lead Actions Type (MKL_SPD_ACTION_TYPE)                    | <ul style="list-style-type: none"><li>Accept leads</li><li>Create campaign</li></ul>                  | Type of actions to perform on recommended leads.                                                                                                                                        |
| AI Update Who Columns Threshold Modes (ORA_ZCA_AI_WHO_THRESHOLD_MODES) | <ul style="list-style-type: none"><li>Turned Off</li><li>5</li><li>10</li><li>25</li><li>50</li></ul> | The percentage threshold for change in AI Lead Score for Leads or Predictive Win Probability for Opportunities. The Last Updated Date field gets updated, if the threshold is exceeded. |

## Set ID Leads Lookups

This table shows the leads set-ID lookup types, their values, and their descriptions. Use the **Manage Set Enabled Lookups** task from the **Setup and Maintenance** work area to access the lookup types related to leads.

| Lookup Type                                                     | Lookup Values                                                                                                         | Description                                                                                         |
|-----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------|
| Lead Qualification Budget Status (MKL_LEAD_BUDGET_STATUS_SETID) | <ul style="list-style-type: none"><li>Approved</li><li>Pending</li><li>Unknown</li></ul>                              | The approval status of a customer budget. The data is used to assess the lead qualification status. |
| Lead Rank (MKL_LEAD_RANK_SETID)                                 | <ul style="list-style-type: none"><li>Cold</li><li>Hot</li><li>Warm</li></ul>                                         | Lead rank values used as a measure of lead quality and prioritization.                              |
| Lead Reassignment Reason (MKL_LEAD_REASSIGN_REASON_SETID)       | <ul style="list-style-type: none"><li>No activity</li><li>Other</li><li>Workload</li></ul>                            | Possible reasons specified for reassigning leads.                                                   |
| Lead Reject Reason (MKL_REJECT_REASON_SETID)                    | <ul style="list-style-type: none"><li>Duplicate lead</li><li>Failed to reach contact</li><li>Incorrect data</li></ul> | Possible reasons specified for rejecting leads. Rejected leads can be reassigned or retired.        |
| Lead Retire Reason (MKL_RETIRE_REASON_CD_SETID)                 | <ul style="list-style-type: none"><li>Duplicate lead</li><li>No purchase interest</li></ul>                           | Possible reasons for retiring leads. Retired leads are considered closed leads.                     |
| Lead Registration Type (MKL_DEAL_TYPE_SETID)                    | <ul style="list-style-type: none"><li>Co-sell</li><li>Referral</li><li>Resale</li></ul>                               | Types of leads available for partners.                                                              |
| Lead Source Channel (MKL_LEAD_CHANNEL_SETID)                    | <ul style="list-style-type: none"><li>Direct mail</li><li>E-Mail</li><li>Fax</li><li>Marketing Cloud</li></ul>        | Source channel responsible for lead generation.                                                     |

| Lookup Type                               | Lookup Values                                                                                                                                                                                                          | Description                                                                                                       |
|-------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
|                                           | <ul style="list-style-type: none"><li>• Phone</li><li>• Sales visit</li><li>• Social</li><li>• Company web site</li><li>• Wireless message</li><li>• Model-based prediction</li><li>• Rules-based prediction</li></ul> |                                                                                                                   |
| Lead Time Frame (MKL_LEAD_TIMELINE_SETID) | <ul style="list-style-type: none"><li>• 3 months</li><li>• 6 months</li><li>• 9 months</li><li>• 12 months</li><li>• 15 months</li><li>• 18 months</li></ul>                                                           | Lead cycle duration that usually coincides with a typical sales cycle duration for products and services offered. |

## Deal Registration Lookups

This table displays deal registration lookup names (called lookup types in the application), their values, and their descriptions.

| Lookup Type                                                           | Lookup Values                                                                                                                                  | Description                                                                                                                                                                                                                                                  |
|-----------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Deal Registration Access Level (ORA_MKL_DEAL_ACCESS_LEVEL)            | <ul style="list-style-type: none"><li>• Edit</li><li>• Full</li><li>• View only</li></ul>                                                      | <p>Specifies the access level of team members for actions they can perform on deal registrations.</p> <p>Full access level allows the user to update the team by adding or removing individual resources or by updating the access level for any member.</p> |
| Deal Registration Assignment Mode (ORA_MKL_DEAL_ASSIGN_MODE)          | <ul style="list-style-type: none"><li>• Both</li><li>• Rule-based Assignment Only</li><li>• Territory-based Assignment Only</li></ul>          | Determines whether deal registration assignment is rule-based, territory-based, or a combination of the two.                                                                                                                                                 |
| Deal Registration Reject Reason (ORA_MKL_DEAL_REJECT_REASON)          | <ul style="list-style-type: none"><li>• Duplicate</li><li>• Ineligible Customer</li><li>• Ineligible Partner</li></ul>                         | Possible reasons for rejecting a deal registration request.                                                                                                                                                                                                  |
| Deal Registration Return Reason (ORA_MKL_DEAL_RETURN_REASON)          | <ul style="list-style-type: none"><li>• Incomplete Customer Information</li><li>• Ineligible Product</li><li>• Insufficient Quantity</li></ul> | Possible reasons for returning a submitted deal registration.                                                                                                                                                                                                |
| Deal Registration Search Filter Record (ORA_MKL_DEAL_SRCH_RECORD_SET) | <ul style="list-style-type: none"><li>• All records I can see</li><li>• Records I own</li></ul>                                                | Specifies record visibility filters for deal registration filtering.                                                                                                                                                                                         |

| Lookup Type                                                                         | Lookup Values                                                                                                                                                       | Description                                                                                                                                                           |
|-------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                                     | <ul style="list-style-type: none"><li>Records pending my approval</li></ul>                                                                                         |                                                                                                                                                                       |
| Deal Registration Filter Record Sets for Workspace (ORA_MKL_DEAL_WRKSPC_RECORD_SET) | <ul style="list-style-type: none"><li>All records I can see</li><li>Records where I am on the team</li><li>Records I own</li></ul>                                  | Specifies record visibility filters for deal registration filtering specific to Workspace search.                                                                     |
| Deal Registration Status (ORA_MKL_DEAL_REG_STATUS)                                  | <ul style="list-style-type: none"><li>Approval</li><li>Draft</li><li>Expired</li><li>Pending Approval</li><li>Rejected</li><li>Returned</li><li>Withdrawn</li></ul> | Deal registration status values based on specific actions performed on deals registered by partners. Used to mark the milestones in the deal registration life cycle. |
| Deal Registration Deal Type (ORA_MKL_DEALREG_DEAL_TYPE)                             | <ul style="list-style-type: none"><li>Existing</li><li>New</li></ul>                                                                                                | Indicates the type of deal the partner is submitting for registration.                                                                                                |

#### Related Topics

- [Overview of Lookups](#)

## How can I assure that the assigned lead owner remains the owner when the lead is converted?

When you assign a lead owner, that lead owner must accept the lead for them to remain the owner of the converted lead. If the lead owner doesn't accept the lead and another salesperson converts the lead into an opportunity, then that second person becomes the owner of the converted lead. You can assure that the assigned lead owners remain the owners of converted leads by creating a Groovy script to automatically accept the lead.

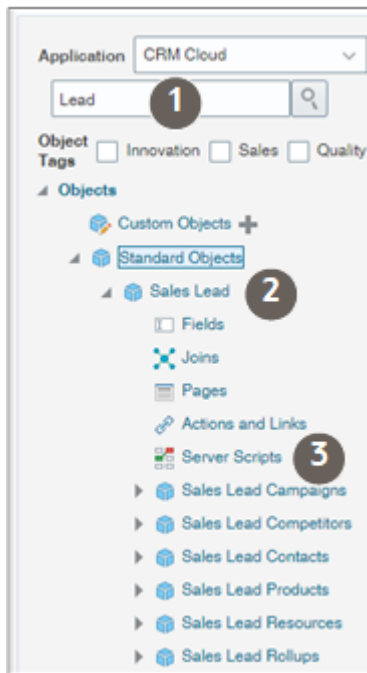
To automatically accept the lead for the assigned lead owner, create a Before Update in Database trigger on the Sales Lead object. Here is a sample script:

```
if (isAttributeChanged('OwnerId') && OwnerId != null){  
    setAttribute('LeadAcceptedFlag', 'Y')  
}
```

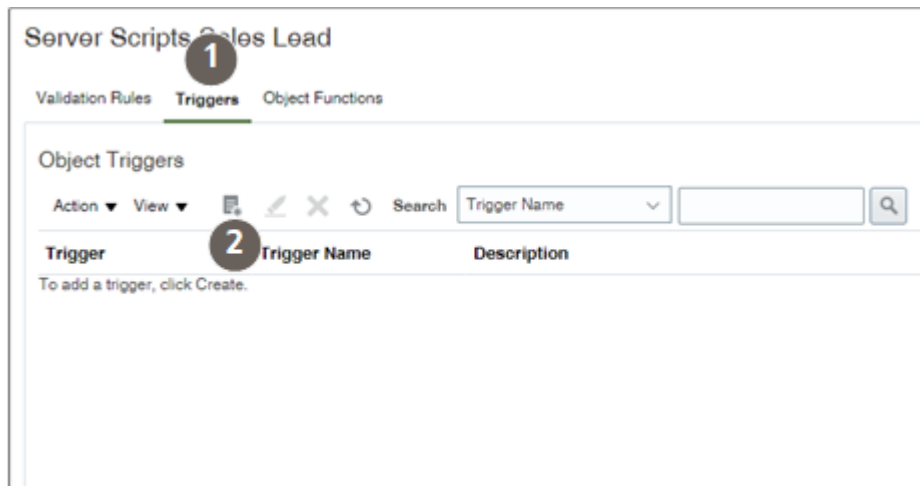
### Steps to Create the Trigger

1. Enter a sandbox with Application Composer as one of the tools.
2. Open Application Composer by selecting it from the sandbox **Tools** menu.

3. In the left pane, search for the **Sales Lead** object (callout 1 in the screenshot).



4. Expand **Sales Lead** under **Standard Objects** (callout 2).
5. Click **Server Scripts** (callout 3).
6. In the Server Scripts Sales Lead page, click the **Triggers** tab (callout 1 in the screenshot).



7. Click **Add a new trigger** (callout 2).



8. In the Create Object Trigger page Name Trigger list, select **Before Update in Database** (callout 1 in the screenshot).

**Create Object Trigger**

**Name**

Trigger: Before Update in Database (1)

\* Trigger Name: Automate\_Lead\_Acceptance

**Error Message** ⓘ

Enter a message to display to the user when validation fails.

\* Trigger Definition ⓘ

**Edit Script**

Find:  < > 🔍 Go to Line:  🔍

```

1 if (isAttributeChanged('OwnerId') && OwnerId != null){
2   setAttribute('LeadAcceptedFlag', 'Y')
3 }
4
5
  
```

(2)

9. Enter a trigger name.
10. Enter the Groovy script (callout 2).
11. You can validate the script by clicking **Validate** on the right side of the Trigger Definition section.
12. Click **Save and Close**.

You must publish the sandbox for the trigger to become active.

#### Related Topics

- [Server Scripts](#)
- [Defining an Object-Level Trigger to Complement Default Processing](#)

## Lead Qualification Templates

### Lead Qualification Templates

Lead qualification templates enable a uniform lead-qualification process across leads. This topic provides an overview of how you can assign and use the templates as part of the lead qualification process.

Using lead qualification templates, you can:

- Define lead qualification templates
- Assign lead qualification templates
- Gather lead quality information
- Enable multiple assessments per lead qualification template

## Define Lead Qualification Templates

Qualification templates are collections of questions and answers that can be weighted and scored to evaluate the quality of gathered information about the sales lead. You use the templates to define consistent and specific qualification criteria for leads.

## Assign Lead Qualification Templates

Once the qualification template is defined, you assign the template to the Lead Qualification Template profile available from the Manage Sales Lead Administrator Profile Values page. You can define more than one qualification template by assigning templates at the site level profile.

## Gather Lead Quality Information

Along with other key qualification fields available in the lead, the qualification template questions are displayed on the lead Qualification tab if you have enabled the Advanced Lead Qualification profile option. Lead qualification is typically conducted through phone conversations. As you enter responses for the qualification questions, the qualification template's weighted score is calculated and a progress bar provides immediate rating and feedback.

## Enable Multiple Assessments Per Lead Qualification Template

To enable sales representatives to perform multiple assessments per qualification template, set the profile option Enable Multiple Assessments Per Qualification Template to Yes.

### *Related Topics*

- [Example of Defining a Sales Lead Qualification Template](#)
- [Enable Multiple Assessments Per Lead Qualification Template](#)

## Example of Defining a Sales Lead Qualification Template

This topic provides an example that illustrates defining a lead qualification template to assess the basic quality of a lead.

### Scenario

Your company sells alternative energy solutions to small businesses. The company employs a group of people that:

- Qualify the basic information about a lead
- Gather the necessary information required by the sales team to prepare for follow-up sales calls

Unqualified leads are generated from various sources and captures when customers have requested more information from your website. Before creating the qualification template, your company evaluates the following:

- Compile a set of questions that each lead qualifier is expected to ask so as to:
  - Verify the customer's intent in requesting more information
  - Ensure a consistent and thorough communication with the customer

- Categorize a set of responses to help identify what leads to transfer to the sales team.

For example, once your company has gathered the initial lead information, they can set up assignment rules so that only leads with a greater potential for a sale are transferred to the sales team. The level of response assists the lead qualifier identify those leads with the greatest sales potential.

To ensure the full range of possible responses, the qualification information is categorized into four basic response levels:

- Very little information was obtained from the customer
  - A high potential of the customer working on an alternative energy project
  - Not applicable
  - Information not available
- Perform analysis of your qualification template and model the set of question responses and questions

Question responses and questions are analyzed and modeled to effectively place the weighted score ranges into the four categories. For example, a budget that expires less than ten days may score low if the average sales cycle is greater than 10 days. However, any answer to a budgeting question has higher weight in the overall questionnaire than a question about the customer's project team. If a qualification template's weighted score is 90 or above, the customer is categorized as a high potential for an energy project. Such a lead is transferred to a sales resource to pursue.

## Lead Qualification Template Considerations

Navigate to the Manage Assessment Templates page from the Manage Sales Lead Qualification Template implementation task. The following categories of qualification levels are entered as ratings of:

- Little Information Available
- Low Project Potential
- Medium Project Potential
- High Project Potential

Questions about the customer's budget, time frame, decision maker, and project drive the sale potential and resulting lead rank. These questions aren't included in the qualification template because the lead qualifier enters those directly in the Lead UI.

Use the qualification template to effectively evaluate the customer's project and prepare the sales team to progress the lead once the lead is qualified.

- Enter a set of questions and responses to qualify the time frame including what phase the customer's implementation project is in.
- Gather information to meet export policies. For example, add questions about implementation projects outside of the country.
- Add questions to determine if and when a customer's budget is due to expire.
- Identify competition by adding questions and responses about competing suppliers or in-house solutions and satisfaction levels.
- Allow a free-form response to enable the lead qualifier to capture specific customer comments about their greatest issue they're trying to solve.

Next, the weighed scores ranges are assigned to the four ratings. To provide a visual queue and feedback to the lead qualifier to guide them in their decision to update the lead as qualified, a color and feedback phrase is entered for the four ratings. The color-coded bar, score, and feedback appear at the top of each qualification questionnaire in the lead.

## Lead Qualification Template Profile

Once the qualification template is defined, the template is assigned to the Lead Qualification Template profile available from the Manage Sales Lead Administrator Profile Values implementation task. Since there is only one business unit for your Company and only one qualification template, the template is assigned at the profile Site level.

As your company continues to grow into a global company with a broader set of business units and products, Qualification templates are created in different languages and assigned to business unit sets. The appropriate qualification template is assigned to corresponding lead qualification users through the Lead Qualification Template profile.

**Note:** The Advanced Lead Qualification Enabled profile option must be set so that you can specify the template name to use. The template displays the collection of questions, possible answers, and questionnaire feedback in the Edit Lead UI.

### Related Topics

- [Lead Qualification Templates](#)

# 23 Opportunities

## Overview of Opportunities

Opportunities allow organizations to support the full sales process, from leads, to opportunities, to sales, to follow-up analytics.

Within opportunities, sales organizations can capture a wide variety of information related to an opportunity, such as customer (account) and the products to be sold. They can use the supplied sales methods and sales stages to step the opportunity to its eventual conclusion.

In addition, account intelligence, sales actions, and historical sales analysis further enable salespeople to increase their win rates by offering data-driven pipeline management and recommendations for the next best sales action. For example, setting win probability variance thresholds and providing multiple recommendations per opportunity enables sales representatives to optimize their sales opportunities.

This table lists opportunity features.

| Feature                          | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
|----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Support the sales life cycle     | Create, manage, and close opportunities, supporting the entire sales life cycle. By integrating with leads, you can convert leads to opportunities. Post-sale, take advantage of supplied business intelligence reports related to sales.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Maintain opportunity information | <p>Here are just some of the data that sales teams can capture for an opportunity:</p> <ul style="list-style-type: none"><li>• Accounts: You can associate an account (for example, a customer or prospect) with the opportunity.</li><li>• Opportunity owner: The person who creates an opportunity is automatically assigned ownership. You can change owner if needed.</li><li>• Contacts: You can associate contacts with an opportunity. In addition, you can specify a contact's role, affinity, and influence level on an opportunity. A single contact can be marked as primary.</li><li>• Currency: The application supports multiple currencies at both the opportunity header and revenue-line levels.</li><li>• Budget: A Budgeted indicator lets you display whether the opportunity revenue amount has been budgeted by the customer, as well as the date that the budget was made available.</li><li>• Competitors and partners: You can associate partners and competitors with opportunities, both at the opportunity and revenue line levels.</li><li>• Marketing data: The Source field allows the association of campaigns with an opportunity.</li><li>• Mass update opportunities: Allow sales personnel to update several opportunity attributes at once on multiple opportunities.</li></ul> |
| Employ sales methodology         | Your company can employ its own sales methodology by using the supplied sales methods and stages. For each sales stage, administrators can create action items (process steps), task templates, recommended documents, assessment templates, and fields that are required for use in opportunities. In addition, administrators can specify a different default win probability percentage for each sales stage.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

| Feature                                                            | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Use Sales Coach for guided selling                                 | Sales Coach, part of sales methods, guides salespeople through each step of the sales cycle with an organization's own sales methodology and best practices. The action items (process steps), task templates, recommended documents, assessment templates, and mandatory fields set up by your administrator in each of the sales stages translate into guided notes and appropriate opportunity UI interactions.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| Leverage the product revenue model                                 | Opportunities support a product revenue model that features revenue-based forecasting, products and product groups, recurring revenue, and revenue data captured at the line level, such as win probability, close date, include in forecast, and status.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Support recommended actions                                        | <p>Prompts salespeople to respond to the next best set of recommended actions for customer engagement, drive pipeline and determine how often to reach out to customers post sales.</p> <p>Here are some of the benefits of the next best sales action feature:</p> <ul style="list-style-type: none"> <li>• Support multiple recommendations per opportunity.</li> <li>• Enables smarter sales experiences and optimizes the selling process.</li> <li>• Provides a percentage win probability in comparison to other opportunities from your sales organization or a prediction about the close date of the opportunity.</li> </ul> <p>For example, based on historical data, the likelihood to close an opportunity is less than 40%.</p> <ul style="list-style-type: none"> <li>• Supports user feedback per opportunity.</li> <li>• Enables administrative and supervisory controls.</li> </ul> <p>For example, manage the win probability variance thresholds for opportunities and define user actions to suit the organization's requirements. As salespeople update the opportunity information, win likelihood and recommended actions are regenerated.</p> |
| Assign sales team                                                  | Opportunities align with territories and the assignment engine for rule-based or territory-based autoassignment of salespeople to opportunities. In the team pages, you also can manually add sales team members to an opportunity.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Allocate sales credit                                              | By allocating sales credit to salespeople on product lines, you can capture the amount of credit salespeople receive for the sale. You can track direct, channel, and overlay resources and their contributions using revenue and nonrevenue credit splits.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Use forecast territories on product lines                          | By integrating with forecasting, you can use forecast criteria to automatically include product-line revenue in the forecast. You can leave the default forecast territory on the product lines or assign another forecast territory. The forecast is refreshed in real-time from revenue when an opportunity is created or updated.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Assess opportunities and their products, contacts, and competitors | You can use assessments to evaluate the health of an opportunity or an opportunity product, contact, or competitor. After setup by the administrator, assessments are available to salespeople in the Assessments tab.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| View business intelligence reports                                 | Several supplied business intelligence reports give you views into sales metrics, from lists of opportunities and accounts, to pipeline data, sales team performance, and other revenue metrics.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

*Related Topics*

- [Best Practices for Sales Credits](#)
- [Overview of Sales Methods, Sales Stages, and Sales Coach](#)
- [Overview of Opportunity Products and Revenue](#)

## Sales Methods, Sales Stages, and Sales Coach

### Overview of Sales Methods, Sales Stages, and Sales Coach

You can use sales methods and sales stages to employ the sales methodology that best aligns with an opportunity.

Use Sales Coach, which administrators set up within sales stages, as both a teaching tool and a method to make your organization's best-practice information readily available to salespeople.

#### Sales Methods and Sales Stages

Sales methods are an opportunity attribute that link sales strategy to sales execution. For example, is the customer more interested in price, features, service, or delivery time? After you make these decisions, you can align your sales methods and sales stages to reflect these customer requirements. You can also use a different sales methodology for your price-conscious customers than for your customers who are interested in features. A sales method can include all activities associated with the different sales stages during the sales process, from qualifying, to negotiating, to closing.

The application comes with a few sales methods and associated sales stages. Administrators can modify the supplied sales methods and stages, or create new ones.

#### Sales Coach

Sales Coach is a virtual coach available to salespeople while they view or edit an opportunity. For example while viewing an opportunity, a salesperson will see Recommended Documents for the sales stage that his opportunity is in. He can download the Recommended Documents that his administrator has posted to help with the sale.

This table describes the tools available as part of sales methods and sales stages.

| Tool                                                | Description                                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Action items (called process steps in the setup UI) | Part of Sales Coach. Guides salespeople through an organization's sales best-practice processes for a particular sales stage.                                                                                                                                                                                                                        |
| Recommended documents                               | Part of Sales Coach. Provides coaching strategies and best-practice information in the form of documents, such as customer letter templates, relevant websites, and training materials.                                                                                                                                                              |
| Task templates                                      | Provides a list of required or recommended tasks relevant to a particular sales stage. Recommended task templates are optional. Autogenerated task templates are automatically applied to your list of tasks for a particular sales stage, when the opportunity moves to that stage. Note that task templates aren't supported in the simplified UI. |

| Tool                 | Description                                                                                                                                                                                                                                  |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Assessment templates | Helps salespeople analyze and score an opportunity attributes. After selecting an assessment type, salespeople enter a series of responses to achieve a weighted score. This score then helps determine the success rate of the opportunity. |

#### Related Topics

- [Create and Edit Sales Methods and Stages](#)
- [Sales Stages Attribute Setup](#)
- [Overview of Sales Coach](#)

## Overview of Opportunity Sales Methods and Stages

A company's sales methodology is a formalized approach toward achieving a sale. In opportunities, you can employ your company's sales methodology using a sales method that's automatically associated with the opportunity when it's created.

The sales method contains several sales stages that salespeople progress as the opportunity matures. Several sales methods and stages are predefined. You can use the predefined ones, modify them to suit your business needs, or create your own ones.

You can specify the default sales method using the profile option, Sales Method Default. Setting the profile option is described in the topic, Set Default Sales Method Profile Option.

**Note:** Sales Coach, which is a teaching tool and method to push best practice information to salespeople in the opportunities UI, is also set up in the sales methods pages, using the sales stages. Assessments also can be associated with sales stages.

#### Related Topics

- [Create and Edit Sales Methods and Stages](#)
- [Set the Default Sales Method Profile Option](#)

## Sales Stages Attribute Setup

Sales stages track the progress of an opportunity during the sales cycle. You change the sales stage when you determine it's time to move the opportunity to the next stage.

### Sales Stage Attributes

You typically set up these attributes while setting up sales stages:

- **Phase:** A step in the sales cycle of an opportunity.

For example, the first step might be Discovery, where the salesperson researches the customer's needs.



- **Order:** The sequence of the stage within a sales method.  
For example, you might start with Discovery and move to Conclusion.
- **Duration:** The number of days an opportunity will remain in this stage.
- **Stalled Deal Limit:** The number of days an opportunity can remain in this stage before it's considered stalled.

You can also associate elements of Sales Coach, such as recommended documents, action items, or assessments, with a sales stage.

#### *Related Topics*

- [Overview of Sales Coach](#)

## How Sales Methods and Sales Stages Work with Opportunities

A typical sales method has several sales stages. Each stage within a sales method delineates the progress of an opportunity.

### Sales Methods

The sales method used on an opportunity represents your company's formalized approach toward the sale. The application comes with a few predefined sales methods. By default, the sales method used on a newly created opportunity is the supplied Standard Sales Process sales method.

### Sales Stages

Several stages usually exist within a single sales method. You use different stages to represent different phases of an opportunity, from prospecting to forecasting to closing the opportunity.

#### *Related Topics*

- [Sales Stages Attribute Setup](#)
- [Overview of Sales Methods, Sales Stages, and Sales Coach](#)
- [Create and Edit Sales Methods and Stages](#)

## Sales Methods and Sales Coach Configuration

### Create and Edit Sales Methods and Stages

You can create and edit sales methods and their stages by following the procedures in this topic.



It doesn't cover these components of sales methods and stages setup:

- Recommended documents
- Action items (called process steps in the setup UI)

- Assessment Templates
- Activity Templates
- Mandatory fields

For information about setting up sales methods and stages, see the related topics.

## Create or Edit Sales Methods

Here's how to create or modify existing sales methods.

**Note:** Several sales methods are predefined. You can use the predefined ones, modify them to suit your business needs, or create your own sales methods. However, if you modify or create a default sales method, then this affects your standard prebuilt business intelligence reports for Sales and you may have to modify them.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Sales Methods and Sales Stages
2. If you want to create a sales method: In the Manage Sales Methods page, click the **Create** icon.
3. 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.
4. In the Create Sales Method or Edit Sales Method page, fill in the required information. Here are some details of 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're 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 it isn't 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.
5. Add new or modify existing sales stages as described in the section, Create or Edit Sales Stages.
6. Save your changes.

## Create or Edit Sales Stages

Here's how to create or modify existing sales stages.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Sales Methods and Sales Stages
2. From the Manage Sales Methods page, select the sales method whose sales stages you want to modify.  
The Edit Sales Method page appears.
3. 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.

4. 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.
5. Set or enter attributes of sales stages. Here are some details of the more complex fields:
  - **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 aren't defined by blanking out any value in this field.
  - **Duration:** Enter the average number of days you expect opportunities to stay in this stage. This field is used in the Stalled Deals infolet and underlying report. When opportunities are in a sales stage longer than the value entered here, they're considered stalled at that stage, and are reported in the stalled deals infolet on the dashboard.
6. Save your changes.

#### Related Topics

- [Overview of Sales Methods, Sales Stages, and Sales Coach](#)
- [Sales Stages Attribute Setup](#)
- [Set the Default Sales Method Profile Option](#)

## Associate Sales Coach and Other Elements with Sales Stages

Sales Coach is a mechanism to present best practice sales methodology to salespeople to improve their sales effectiveness. A teaching tool, Sales Coach can help less experienced salespeople with aspects of an opportunity when and where they need help.

Administrators set up Sales Coach by associating action items and recommended documents with a sales stage. Salespeople can then view these items as they work their opportunities. Since the teaching components or job aids are associated with a specific sales stage, each sales stage potentially can have multiple action items and recommended documents associated with it.

Here are the elements that you can define for each sales stage:

- Sales Coach items:
  - Action items (process steps): These are recommended actions the salesperson should take while working an opportunity in a specific sales stage. Action Items appear in the Sales Coach region of the edit opportunity page.
  - Recommended documents: These are documents, files, or URLs recommended for viewing or sharing during a specific sales stage. Recommended Documents appear in the Sales Coach region of the edit opportunity page.
- Other items:
  - Task templates: You can define task templates to set tasks for salespeople to perform. For more information, see the topic, Associate Task Templates with Assessment Templates.
  - Assessment templates: Assessments let salespeople evaluate the health of an opportunity. Opportunity assessments appear under a separate tab labeled Assessments in the edit opportunity page. For more information, see the topic, Guidelines for Setting Up Opportunity Assessments.
  - Required fields: You can mark specific fields as required for a specific sales stage. When a salesperson moves an opportunity to that sales stage, the fields you mark as required become marked with an asterisk that users must complete before moving to the next sales stage.

**Note:** The required fields validation doesn't support check box fields so don't mark check box fields as a required field for a specific sales stage.

## Add Action Items (Process Steps)

Here's how to add action items to a sales stage. Note that in the setup pages, action items are set up in the Process Steps region.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Sales Methods and Sales Stages
2. From the Manage Sales Methods page, click the sales method whose sales stages you want to modify.  
The Edit Sales Method page appears.
3. In the Edit Sales Method page, click the sales stage you want to modify. In the upper portion of the page, it's assumed you would have already entered the core information for the sales stage. For more information about these fields, see the topic, Create and Edit Sales Methods and Stages.
4. In the Process Steps region, click the create icon to create a process step. Enter your process step information. For example, a first process step or action item might be "Gather High Level Information from Customer".

Process steps show up as Action Items in the Sales Coach region in the edit opportunity pages. The action items show up only when the opportunity is in the sales stage that you associated with the process steps.

5. Save your changes.

## Add Recommended Documents

To add recommended documents, edit a sales stage using the steps outlined in the preceding procedure, Adding Action Items (Process Steps). In the Recommended Documents region, attach documents, files, or URLs that you want your salespeople to have access to in the edit opportunity pages. For example, you can give your salespeople access to marketing materials, collateral, or websites. Recommended documents are available in the edit opportunity page when the salesperson is editing the opportunity in the sales stage that's associated with these documents.

### Related Topics

- [Overview of Task Templates](#)
- [How Assessment Templates Work with Task Templates](#)
- [How do I update existing setup data?](#)

## Set the Default Sales Method Profile Option

You can specify what sales method to apply to all newly created opportunities by setting the profile option Sales Method Default.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Opportunity Profile Options

2. In the search region of the Manage Opportunity Profile Options page, select **Opportunity Management** as the application, or just enter the profile option name `Sales Method Default` directly in the **Profile Display Name** field.
3. In the search results list, click the profile option name.
4. Set the profile option to the sales method you want to be the default for newly created opportunities.

**Note:** Opportunity and revenue reports and analytics are designed to work with the Standard Sales Process method supplied by Oracle. If you use other sales methods as the default sales method, then you might have to modify your reports.

#### Related Topics

- [How do I update existing setup data?](#)

## Task and Assessment Templates

### Add Assessment Templates to Sales Stages

Assessments let salespeople evaluate the health of an opportunity while they work on it as part of their sales process.

Assessments can be used, for example, to help determine whether an opportunity is viable enough for the salesperson to offer an incentive, such as a discount, to the customer. Assessments include questions with scored responses. Responding to the questions provides the salesperson with immediate scoring and recommendations or follow-up business processes.

You create assessment templates in the setup pages and then add the assessment template to an opportunity sales stage. The assessment generated from the template are accessible to salespeople in the Assessments tab in opportunities for the sales stage you associated with them.

Here are the high-level steps to add assessments to sales stages:

1. Define your assessment templates using the Manage Opportunity Assessment Templates task available from the Setup and Maintenance work area.

For more information, see the Assessments chapter in the Implementing Sales guide. The topic, How to Create Assessment Templates, has the steps.

2. Edit a sales stage and, in the Assessment Templates area, associate the assessments with a sales stage. Mark the assessment mandatory to make it required that salespeople complete the assessment before they can move the opportunity to another sales stage.

For more information, see the section Opportunity Assessments, in the Opportunities chapter of the Using Sales guide. The topic, Perform an Opportunity Assessment, has the steps.

### Add Assessments to Sales Stages

Here's the procedure to add an assessment template to an opportunity sales stage.

**Note:** You must have already created an assessment template before it's available to add to a sales stage. See the topic, Create Assessment Templates, for the steps.

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Sales Methods and Sales Stages
2. On the Manage Sales Methods page, click the sales method whose sales stages you want to modify.  
The Edit Sales Method page appears.
3. In the Edit Sales Method page, click the sales stage you want to configure. In the upper portion of the page, it's assumed you would have already filled out the core information for the sales stage. For more information about these fields, see the topic, Create and Edit Sales Methods and Stages.
4. In the Assessment Templates region, click the create icon.
5. Search for and select the assessment template you created earlier.
6. In the **Type** column, pick:
  - o Recommended if you want the salesperson to have access to the assessment in the Assessments tab for this sales stage, but isn't required to complete before moving the opportunity to the next sales stage.
  - o Mandatory if you want the salesperson to have access to the assessment in the Assessments tab for this sales stage, and is required to complete before moving the opportunity to the next sales stage.
7. Save your changes.

#### Related Topics

- [Guidelines for Setting Up Opportunity Assessments](#)
- [How to Create Assessment Templates](#)
- [How do I update existing setup data?](#)

## Add Task Templates to Sales Stages

A task template is a group of tasks associated with a business object, including opportunities. You create a task template in the setup pages and then add the task template to an opportunity sales stage.

The tasks generated from the template are accessible to salespeople in the Activities tab in opportunities, for the sales stage you associated with them.

Here are the high-level steps to add tasks to the Activities tab in opportunities for a particular sales stage:

1. Define your task templates using the Manage Sales Task Templates task available from the Setup and Maintenance work area.  
For more information, see the Task Templates chapter in the Implementing Sales guide. The topic, Create a Task Template, has the steps.
2. Edit a sales stage and, in the Activity Templates area, associate the task template with a sales stage, as described next.

## Add Task Templates to Sales Stages

Here's how to add a task template to an opportunity sales stage.

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Opportunities

- Task: Manage Sales Methods and Sales Stages
- 2. On the Manage Sales Methods page, click the sales method whose sales stages you want to modify. The Edit Sales Method page appears.
- 3. In the Edit Sales Method page, click the sales stage you want to configure. In the upper portion of the page, it's assumed you would have already completed the core information for the sales stage. For more information about these fields, see the topic, Create and Edit Sales Methods and Stages.
- 4. In the Activity Templates region, click the create icon.
- 5. Search for and select the task template you created earlier.
- 6. In the **Type** column, select **Automatically generated** as the type.  
If you don't select Automatically generated, the associated tasks won't appear in the UI for users.
- 7. Save your changes.

#### Related Topics

- [Overview of Task Templates](#)
- [Define Tasks](#)
- [Create a Task Template](#)
- [How do I update existing setup data?](#)

## Sales Statuses

### How do I modify sales statuses?

Opportunities and product lines on opportunities have statuses, such as Lost, No Sale, Open, and Won. You can create sales statuses or update existing ones, as long as you stay within the predefined categories.

Salespeople select statuses for an opportunity or for a product line while editing an opportunity. The application can set statuses automatically when synchronizing the opportunity header and its product lines. The application uses status categories when calculating Business Intelligence metrics for win/loss analysis.

### Predefined Sales Statuses and Status Categories

The application comes with four predefined sales statuses and status categories. The predefined statuses are part of larger status categories. Status categories aren't visible in the UI, but statuses are.

To change statuses, you can create statuses and then associate them with existing status categories. You can't add new status categories.

This table shows the predefined statuses and categories:

| Status Code, Status, and Category | Meaning                                                                            |
|-----------------------------------|------------------------------------------------------------------------------------|
| Lost                              | Opportunity is closed without proceeding to a sale and lost to competitors, if any |
| No Sale                           | Opportunity is closed and not pursued                                              |

| Status Code, Status, and Category | Meaning                                                                                           |
|-----------------------------------|---------------------------------------------------------------------------------------------------|
| Open                              | Time between when a potential sales is realized and the customer decision on the sale is obtained |
| Won                               | Opportunity is closed with a buying decision from the customer and won over competitors, if any   |

## Create and Modify Sales Statuses

You can create sales statuses or update existing ones, as long as you stay within the four predefined categories. You also can mark statuses as inactive or active. Inactive statuses don't display in the UI.

These rules apply when creating sales statuses:

- Statuses must belong to one of the predefined status categories.
- The Status values display in alphabetic order on the UI.
- Status codes must be unique and can't be blank.
- The Status value must be unique and can't be blank.
- At least one active status in the Open status category must exist.

Oracle recommends that you retain the predefined status codes. As a best practice, if you want to configure statuses, create additional codes. Don't obsolete or replace existing status codes.

Here's how to modify sales statuses:

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Sales Status
2. In the Manage Sales Statuses page click the **Add** icon to add a new status and:
  - a. Enter a new **Status Code**.
  - b. Enter a new **Status**. This is the value that displays in alphabetic order in the opportunity pages.
  - c. Select the **Active** check box.
  - d. Select from one of the predefined values for **Status Category**.
3. To modify an existing status, click in the row of the status so that it becomes editable and modify the values as you want.
4. Save your changes.

This figure shows the Manage Sales Statuses page with a new status added named "Abandoned".



**Manage Sales Statuses**

**Sales Statuses**

Actions ▾ View ▾ Format ▾ + 

| Status Code | Status    | Active                              | Status Category | Description                           |
|-------------|-----------|-------------------------------------|-----------------|---------------------------------------|
| ABANDONED   | Abandoned | <input checked="" type="checkbox"/> | Lost ▾          | Custom status for abandoned           |
| LOST        | Lost      | <input checked="" type="checkbox"/> | Lost            | Seeded Lost status for opportunity    |
| NO_SALE     | No Sale   | <input checked="" type="checkbox"/> | No sale         | Seeded No Sale status for opportunity |
| OPEN        | Open      | <input checked="" type="checkbox"/> | Open            | Seeded Open status for opportunity    |
| WON         | Won       | <input checked="" type="checkbox"/> | Won             | Seeded Won status for opportunity     |

#### Related Topics

- [Opportunity and Product Line Attributes Synchronization](#)
- [How do I update existing setup data?](#)

## Opportunity Closure

### About Setting Up Opportunity Closing

Salespeople can close an opportunity when the deal is either won, lost, or abandoned for some reason by setting the opportunity to a closed status.

Here's the default application behavior. The application sets the close date to 20 days after the opportunity is created if you didn't enter a different period in the Close Window field during sales method setup (callout 1). When salespeople select one of the closed statuses (Won, Lost, or No Sale) (callout 2), they must enter a win or loss reason and a competitor (callouts 3 and 4).

Actions ▾SaveSave and CloseCancel

1

2

3

4

\* Close Date12/8/15📅

StatusWon▾

\* Win/Loss Reason▾

CurrencyUSD▾

Amount0.00

\* Primary Competitor▾

Sales Stage07 - Closed▾

Add

| Estimated Price | Amount | Sales Credit | Currency |
|-----------------|--------|--------------|----------|
| 5,400.00        | 0.00   |              | USD      |

- By setting profile options, you can:
- Make the entry of the win or loss reason optional.
  - Make the entry of the competitor optional.
  - Set a different number of days for the default opportunity close date.

If you keep the default application behavior, then the setup user or another user with the Sales Administrator job role must create the list of competitors as described in the Setting Up Competitors chapter.

If you make the win or loss and competitor entry optional, the fields remain in the Edit Opportunity page. You can use Application Composer to remove them.

## Set the Close Opportunity Profile Options

You can configure close opportunity behavior by using profile options outlined in this topic.

### Close Opportunity Profile Options

This table shows the profile options that control opportunity close behavior.

| Profile Option Display Name                                      | Default Value | Effect                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|------------------------------------------------------------------|---------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Close Opportunity Win/Loss Reason Required (MOO_CLOSE_COMP_REQD) | Yes           | Determines whether, when closing an opportunity, the user is required to enter a win or loss reason. Applies both at the opportunity and revenue item levels.                                                                                                                                                                                                                                                                                        |
| Close Opportunity Competitor Required (MOO_CLOSE_COMP_REQD)      | Yes           | Determines whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels.                                                                                                                                                                                                                                                                                                |
| Opportunity Close Date Default (MOO_DEFAULT_CLOSE_WINDOW)        | 20            | <p>Determines the number of days to add to the system date when determining the default opportunity close date.</p> <p>The close date defaulting logic follows this precedence.</p> <ul style="list-style-type: none"><li>• If the Close Window value on the sales method is set, it's used</li><li>• Or else, if this profile option (MOO_DEFAULT_CLOSE_WINDOW) is set, its value is used</li><li>• Or else, the Close Date is left blank</li></ul> |
| Opportunity Close Date Retain on Closure (MOO_RETAIN_CLOSE_DATE) | No            | Tells the application to retain the old close date even after the status of the opportunity or product line is set to a closed status. If you don't set this profile option to yes, then the close date on the opportunity header or product line is updated with the current date when the opportunity or product line is closed.                                                                                                                   |

## Set the Profile Options

Here's how to find and set the close opportunity profile options.

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Opportunity Profile Options
2. In the search region of the Manage Opportunity Profile Options page, enter the profile option name in the **Profile Display Name** field.
3. Click **Search**.
4. In the list that's returned, click on the profile option name link.
5. Set the profile option value as needed.

### Related Topics

- [How do I update existing setup data?](#)

## Opportunity Business Logic Summary

This topic provides a summary of opportunity and product-line business rules relevant to opportunity close processes and their applicability in the edit opportunity, close opportunity, mass update opportunities, and mass update revenue lines flows.

This table describes the synchronization update effect during the close opportunity flow.

| Object or Field Being Updated       | Effect                                                             | Applicable to Edit Opportunity Flow | Applicable to Close Opportunity Flow | Applicable to Mass Update Opportunities |
|-------------------------------------|--------------------------------------------------------------------|-------------------------------------|--------------------------------------|-----------------------------------------|
| Win probability, close date, status | Copy opportunity attribute value to revenue line attribute values. | Yes                                 | Yes                                  | Yes                                     |
| Win/loss reason                     | Copy opportunity attribute value to revenue line attribute values. | No                                  | Yes                                  | Yes                                     |

This table describes the field or attribute change affect during a change to opportunity status in the context of the close opportunity flow.

| Opportunity Status Change | Effect                                                                                                                                                 | Applicable to Edit Opportunity Flow | Applicable to Close Opportunity Flow | Applicable to Mass Update Opportunities |
|---------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|--------------------------------------|-----------------------------------------|
| To won                    | Set sales stage to last stage of sales method. Set win probability to 100 percent.                                                                     | Yes                                 | Yes                                  | Yes                                     |
| To lost or no sale        | Set close date to current date                                                                                                                         | Yes                                 | Yes                                  | Yes                                     |
| From open to closed       | <ul style="list-style-type: none"> <li>Enable win/loss reason</li> <li>Set actual close date to system time stamp</li> </ul>                           | Yes                                 | Yes                                  | Yes                                     |
| From open to closed       | Copy primary competitor to revenue line where competitor is undefined                                                                                  | No                                  | Yes                                  | Yes                                     |
| From closed to open       | <ul style="list-style-type: none"> <li>Set actual close date to undefined</li> </ul> <p>Disable win/loss reason. Set win/loss reason to undefined.</p> | Yes                                 | Yes                                  | Yes                                     |

This table describes the field or attribute change affect during a change to opportunity revenue line status in the context of the close opportunity flow.

| Revenue Line Status Change | Effect                                                                                                                                                            | Applicable to Edit Opportunity Flow | Applicable to Close Opportunity Flow | Applicable to Mass Update Opportunities | Mass Update Revenue Lines |
|----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|--------------------------------------|-----------------------------------------|---------------------------|
| To won                     | Set win probability to 100 percent.                                                                                                                               | Yes                                 | Yes                                  | Yes                                     | Yes                       |
| To lost or no sale         | Set close date to current date.                                                                                                                                   | Yes                                 | Yes                                  | Yes                                     | Yes                       |
| From open to closed        | <ul style="list-style-type: none"> <li>Enable win/loss reason.</li> <li>Set actual close date to system time stamp.</li> </ul>                                    | Yes                                 | Yes                                  | Yes                                     | Yes                       |
| From closed to open        | <ul style="list-style-type: none"> <li>Disable win/loss reason.</li> <li>Set win/loss reason to undefined.</li> <li>Set actual close date to undefined</li> </ul> | Yes                                 | Yes                                  | Yes                                     | Yes                       |

This table describes the validations done for competitor, win/loss reason, and status, during the close opportunity flow.

| Object Being Validated | Effect                                                                                                                           | Applicable to Edit Opportunity Flow | Applicable to Close Opportunity Flow | Applicable to Mass Update Opportunities | Mass Update Revenue Lines |
|------------------------|----------------------------------------------------------------------------------------------------------------------------------|-------------------------------------|--------------------------------------|-----------------------------------------|---------------------------|
| Competitor             | If the profile option, Close Opportunity Competitor Requirement, is enabled, require competitor on opportunity and revenue line. | Yes                                 | Yes                                  | Yes                                     | Yes                       |
| Competitor             | Validation error dialog option to copy primary competitor to revenue line.                                                       | Yes                                 | Yes                                  | No                                      | No                        |
| Win/loss reason        | If the profile option, Close Opportunity Win/Loss Reason Requirement, is enabled, require                                        | Yes                                 | Yes                                  | Yes                                     | Yes                       |

| Object Being Validated | Effect                                                    | Applicable to Edit Opportunity Flow | Applicable to Close Opportunity Flow | Applicable to Mass Update Opportunities | Mass Update Revenue Lines |
|------------------------|-----------------------------------------------------------|-------------------------------------|--------------------------------------|-----------------------------------------|---------------------------|
|                        | win/loss reason on opportunity and revenue line.          |                                     |                                      |                                         |                           |
| Status                 | Revenue line status must be valid for opportunity status. | Yes                                 | Yes                                  | Yes                                     | Yes                       |

#### Related Topics

- [Opportunity and Product Line Attributes Synchronization](#)

## Data Security

### How Sales Users Gain Access to Sales Information

The security reference implementation provided by Oracle determines who can access opportunity information in your sales organization. While basic information on accounts and contacts is available to all salespeople, your access to sales data is restricted by your position in the resource hierarchy, membership in the sales team, and ownership.

Whether or not you can access a particular opportunity or a lead depends on your membership in the resource and territory hierarchies. Here's how you gain access to opportunities. Lead access follows the same pattern. You can access an opportunity if:

- You create the opportunity.
- You're on the opportunity sales team.
- The opportunity owner or sales team member is your direct or indirect report in the resource hierarchy.
- You're the owner or are a member of the territory assigned to the opportunity.
- You're the owner or member of a parent territory of the territory assigned to the opportunity.
- You're assigned to a territory for the account associated with the opportunity.
- You're assigned to a territory that's a parent of the territory for the account associated with the opportunity.

Salespeople can see all opportunities related to their accounts but access differs between territory members and opportunity members:

- An opportunity owner gets full access to the opportunity, which includes the ability to edit as well as add and remove team members.
- Owners and members of territories or parent territories assigned to the opportunity account get read-only access to the opportunity and aren't added to the opportunity sales team.
- Owners and members of territories assigned to the opportunity product lines are added as a distinct list of territories to the opportunity sales team. Owners and members of these territories get full access to the opportunity. Depending on a profile option, either only the owner or all the members of the territory are added

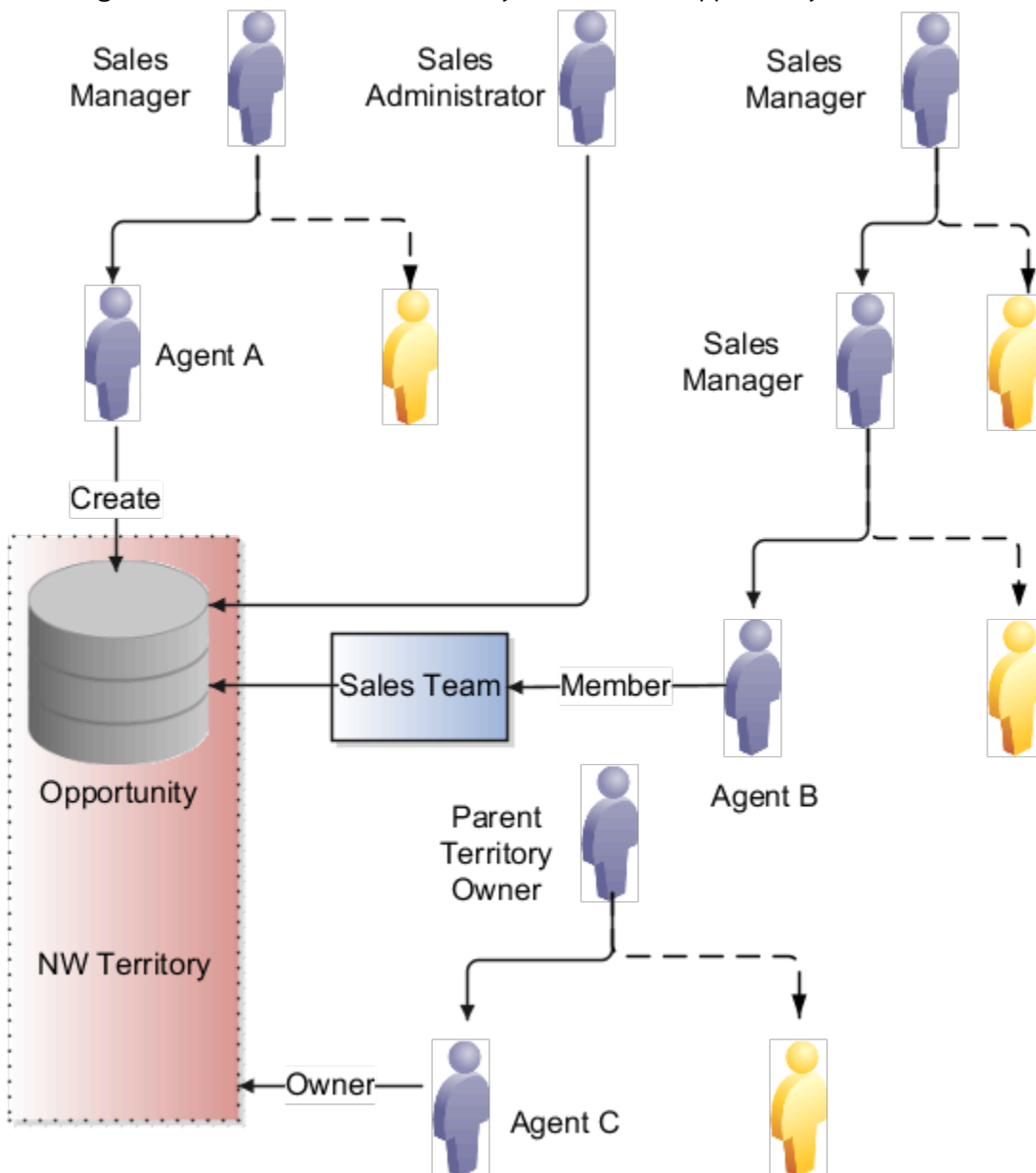
as resources to the opportunity sales team. Regardless of the access level for these members as a resource on the opportunity team, they always have full access.

Owners and members of parent territories of the territory assigned to the opportunity aren't added to the opportunity sales team but they always get full access.

The following diagram illustrates some of the different ways that you can gain access to an opportunity:

- Named agents in the diagram (A, B, and C) can access the opportunity.
- Unnamed agents (highlighted in yellow) can't access the opportunity.
- Sales managers can access the opportunity because a salesperson in their management chain has access.
- Owners of parent territories can access the opportunity through the sales territory hierarchy.

This diagram shows who in a sales hierarchy can access an opportunity.



- Agent A can access the opportunity because she created it. When you create an opportunity, you're the initial owner.
- Agent B can access the opportunity because he's on the sales team.
- Sales managers who are higher up in the management chain can also see the opportunity because access is provided through the resource hierarchy. The managers of Agent A and Agent B can access the opportunity information, but agent A and Agent B's colleagues can't.
- Agent C can access the opportunity because he's the owner of the NW territory. The owner of the parent territory can also access the opportunity.
- Sales administrators can access the opportunity.

**Note:** Access using accounts isn't shown in this diagram.



## Special Access

Some access isn't affected by the management hierarchy and membership in sales teams or territories. This special access includes:

- **Administrators:** Users assigned the Sales Administrator job role get full access to opportunities and other objects. This access is based on their privileges, regardless of where the administrators are in the management hierarchy. Administrators don't have to be on the sales team or members of territories.
- **Deal Protection:** Salespeople assigned to an opportunity retain the sales credit on an opportunity even if they're moved to another opportunity.

## Default Sales Channel

### Default Sales Channel Setup in Opportunities

The sales channel of an opportunity indicates whether the opportunity is being handled directly by an internal salesperson, or indirectly by an outside partner, such as a distributor or a reseller.

You can define your territories to include a sales channel, which lets you assign defined resources for each channel and to analyze your revenue by sales channel.

### Sales Channel Support

You can set the sales channel at the opportunity header and revenue item levels. The application automatically applies the header value to revenue items when the status category matches.

Use the Manage Default Attributes for Partner Opportunities task to set the default sales channel. This setup enables the Lead Registration Type of a partner lead to determine the default sales channel on an opportunity once the lead registration is approved and converted into an opportunity. If partner functionality isn't implemented, the application automatically sets the sales channel to Direct for all opportunities.

### Default Sales Channel During Opportunity Creation

If you create an opportunity and there's no partner and no lead registration type associated with the opportunity, the header-level sales channel is set to Direct. If you add revenue items while creating the opportunity, the sales channel of the revenue lines is set to the same sales channel as the header.

If you create an opportunity from a lead conversion, it won't have a lead registration type, and the sales channel is set to Direct.

If you create an opportunity from an approved lead registration, the application uses the lead registration type to determine the appropriate header-level sales channel value. For example, an opportunity that originated from a Resale lead registration carries a default sales channel of Indirect (using the default configuration).

When a revenue item is added to an opportunity, the default value of the sales channel always matches the header-level value.

Note that if a lead registration is linked to an opportunity manually from the leads UI, the sales channel predefined logic based on lead registration type doesn't apply.

# Opportunity Search

## Set Opportunity Search Profile Options

You can configure opportunity search activity by setting profile options described in this topic.

### Opportunity Search Profile Options

This table lists the profile options that control opportunity search activity.

| Profile Option Display Name                                             | Default Value    | Effect                                                                                                                                                                                                                            |
|-------------------------------------------------------------------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Require Additional Criteria for Opportunity Search Enabled              | No               | Determines whether additional search criteria, other than close date, is required when you want your search to: <ul style="list-style-type: none"><li>Extend across all opportunities</li><li>Rely on hierarchy rollups</li></ul> |
| Opportunity Number Search Enabled for Simplified UI                     | No               | Enable opportunity search by Opportunity Number in the simplified UI.                                                                                                                                                             |
| Opportunity Search Close Period Default                                 | Current Quarter  | Sets the system date and system date + 90 days as the default value displayed in the Close Period list of values in opportunity search.                                                                                           |
| Search Opportunity Filter Default                                       | My Opportunities | Specify the default value displayed in the table filter in revenue search.                                                                                                                                                        |
| Opportunity Search Context-Based Data Security Enabled                  | No               | Enable for improved performance of opportunity search.                                                                                                                                                                            |
| Opportunity Search High Performance Data Security Wrapper Query Enabled | Yes              | Enable SQL wrapper query on top of data security SQL predicates for improved performance of opportunity search. If disabled, use underlying data security SQL predicates.                                                         |
| Opportunity Search Panel Collapsed                                      | Yes              | Enable a collapsed view of opportunity search panel by default. Set to No to have default view as expanded.                                                                                                                       |

### Sort Opportunity Searches by Last Updated Date

You can sort the records returned from your opportunity search by setting the Opportunity List Sort profile option. By default, records on the Opportunity List are sorted by Win Probability and Opportunity Name. However, setting the

Opportunity List Sort profile option value to Y enables opportunities to be sorted by last updated date in descending order so that sales representatives can quickly review and action recently updated opportunities.

## Set the Profile Options

Here's how to set the opportunity search profile options.

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Opportunity Profile Options
2. In the search region of the Manage Opportunity Profile Options page, enter the profile option name in the **Profile Display Name** field.
3. Click **Search**.
4. In the list that's returned, click the profile option name link.
5. Set the profile option value as needed.
6. Click **Save**.

### Related Topics

- [How can I sort my opportunity list by last updated date?](#)
- [How do I update existing setup data?](#)

## How can I sort my opportunity list by last updated date?

You can sort the records returned from your opportunity search by setting the Opportunity List Sort profile option.

## Sort Opportunity Searches by Last Updated Date

By default, records on the Opportunities overview page are sorted by win probability and opportunity name. However, if you set the Opportunity List Sort (MOO\_LIST\_DEFAULT\_SORT) profile option to Y, then the opportunities are sorted by last updated date in descending order. This enables sales representatives to quickly review and act upon recently updated opportunities.

## Set the Profile Option

Here's how to set the Opportunity List Sort profile option:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Opportunity Profile Options
2. In the search region of the Manage Opportunity Profile Options page, enter Opportunity List Sort in the **Profile Display Name** field.
3. Click **Search**.
4. In the Profile Values section, select Y from the **Profile Value** drop-down list.

5. Click **Save**.

Related Topics

- [How do I update existing setup data?](#)

## Configure Opportunity Close Period Search

When users search for opportunities, they have a choice of several opportunity fields on which to search. One of the fields is Close Period, which is a range based on opportunity close date.

If the supplied opportunity Close Period search values don't meet your business needs, you can add or remove the values that the user can see by modifying the opportunity lookup type, Close Period Values for Search. For example, you can configure the Close Period search so that users can pick all opportunities in the past 45 days, in the current year, in the next three quarters, or in the next three years. You can enable values that aren't enabled by default, and you can add your own user-defined values.

Note that users can search for an opportunity without any close date filter.

Here's how to modify the Close Period Values for Search lookup type:

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Standard Lookups
2. In the Manage Standard Lookups page, search for the lookup type, Close Period Values for Search (MOO\_OPTY\_SRCH\_CLS\_PERIOD) and update the lookup codes as needed:
  - Use the **Enabled** to enable or disable a specific lookup code.
  - Update the meaning (display name), start date, end date, check box or display sequence of any of the predefined values.
  - Add or remove lookup codes, as long as they follow the correct lookup code formatting. See the section, Action and Best Practices, for more information about properly formatted lookup codes.

### Action and Best Practices

Typically, in your implementation, you have already created and have in use the accounting calendar, also called the fiscal calendar. The effect of and best practices for the close period lookup type values are different depending on whether they reference standard Gregorian or accounting calendar lookup values.

This table describes the differences for the lookup type MOO\_OPTY\_SRCH\_CLS\_PERIOD.

| Standard Gregorian Calendar Values                                           | Fiscal/Accounting Calendar Values                                                       |
|------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| The enabled Gregorian periods are displayed.                                 | The enabled fiscal periods are displayed, in addition to the enabled Gregorian periods. |
| Supported periods are: <ul style="list-style-type: none"><li>• Day</li></ul> | Supported periods are: <ul style="list-style-type: none"><li>• Quarter</li></ul>        |

| Standard Gregorian Calendar Values                                                                                                                                                                                                                                                                                 | Fiscal/Accounting Calendar Values                                                                                                                                                                                                              |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <ul style="list-style-type: none"> <li>Week</li> <li>Quarter</li> <li>Month</li> <li>Year</li> </ul>                                                                                                                                                                                                               | <ul style="list-style-type: none"> <li>Year</li> </ul>                                                                                                                                                                                         |
| <p>Lookup codes don't require a suffix as per these examples:</p> <ul style="list-style-type: none"> <li>CURR_QTR: Current Quarter</li> <li>NEXT_4_QTRS: Next 4 Quarters</li> <li>PREV_180_DAYS: Previous 180 Days</li> </ul> <p>You must enter the correct code as invalid values aren't displayed in the UI.</p> | <ul style="list-style-type: none"> <li>Fiscal period lookup codes must have the suffix _FSCL.</li> <li>Predefined fiscal periods include the term "Fiscal" in the display name, for example, CURR_QTR_FSCL: Current Fiscal Quarter.</li> </ul> |

These actions and best practices are common to both types of calendars:

- Close period lookup codes not in the correct format aren't shown.
- When the accounting calendar and the close period setup don't match (for instance, the accounting calendar is set up for a quarter, but the fiscal period is set to Next Month), then this close period value isn't shown.
- When the default close period value or a value previously used in a saved search is disabled, then the close date range for that search is set to blank. Users can save the same search with a new value for future use, or they can restore the value, in which case the search would work as before.
- You can define a close period called "All" that includes a time span wide enough to view all open opportunities in one list, rather than viewing multiple lists for different periods.

#### Related Topics

- [Create the Accounting Calendar](#)
- [How do I update existing setup data?](#)

## Enable Opportunity Search Filter Record Set Values for Territory Membership

You can enable the territory membership and territory membership hierarchy values that appear in the opportunity search filter record sets.

The **My territory membership** record set returns records where the signed in user is either the owner or a member of territories assigned to the opportunity. The **My territory membership hierarchy** returns records where the signed in user is either the owner or a member of a territory assigned to the opportunity, or owner or member of a territory that's ascendant to an assigned territory. These record sets are predefined but they must be enabled before your salespeople can use them.

Here are the steps to enable the **My territory membership** and **My territory membership hierarchy** values for the opportunity search filter record sets.

1. Navigate to the Setup and Maintenance work area, and use the following:

- Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Standard Lookups
2. In the **Meaning** field, enter `Opportunity Search Filter Record Sets`.
  3. Click **Search**.
  4. Select the lookup type you want to enable in the MOO\_OPTY\_SRCH\_RECORD\_SET: Lookup Codes page.
    - Scroll to the MYASSGMEMBTERRROPTIES (My territory membership) lookup code and select **Enabled**.
    - Scroll to the MYASSGMEMBDESCTERRROPTIES (My territory membership hierarchy) lookup code and select **Enabled**.
  5. Click **Save and Close**.

## Opportunity Setup Data Reference

### Opportunity Profile Options Default Values and Effects

Opportunity profile options are configurable options that affect how opportunities are managed. Values defined at the user level take precedence over values set at the site level. If a value isn't defined at the user level, the site level value is used.

The effect of setting each of the opportunity profile options is described in these sections:

- Opportunity Assignment
- Opportunity Close Options
- Opportunity Sales Method and Revenue
- Opportunity Team and Partner
- Opportunity Searches
- Opportunity Lists and Filters
- Opportunity Copy Mapping

### Opportunity Assignment

This table lists the profile options that affect the assignment of opportunities.

| Profile Option Display Name               | Default Value | Effect                                                                                                                              |
|-------------------------------------------|---------------|-------------------------------------------------------------------------------------------------------------------------------------|
| Territory-Based Assignment Rule Category  | None          | Specifies the rule category used for rule filtering during opportunity territory-based assignment.                                  |
| Territory Based Resource Assignment Style | All           | Determines whether to copy all territory resources to the opportunity team or just the territory owner during territory assignment. |

| Profile Option Display Name                         | Default Value                   | Effect                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|-----------------------------------------------------|---------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                     |                                 | <b>Note:</b><br>The <b>Lock Assignment</b> check box, if selected, takes precedence and prevents a salesperson from being automatically removed from an opportunity through the assignment engine. Only users with Full access on the opportunity can select or deselect the Lock Assignment check box for sales team members.                                                                                                                                                                             |
| Sales Team Member Assignment Rule Category          | None                            | Specifies the assignment rule category used by the automatic assignment process to assign sales team members to opportunities.                                                                                                                                                                                                                                                                                                                                                                             |
| Opportunity Assignment Mode                         | Territory-based Assignment Only | Determines the types of assignment modes allowed during opportunity assignment.                                                                                                                                                                                                                                                                                                                                                                                                                            |
| Assignment Submission at Save Enabled               | No                              | Determines whether the assignment engine is started automatically when an opportunity is saved.                                                                                                                                                                                                                                                                                                                                                                                                            |
| Territory-Based Assignment Selective Update Enabled | Y                               | <p>Enables opportunity time stamp update during territory-based assignment if assignment outcome changed. If disabled, always update opportunity time stamp during territory assignment.</p> <p><b>Note:</b> When enabled, this profile option updates only the Revenue Owner and Opportunity Owner. For example, to reduce the performance overhead, the last assigned time stamp (date) isn't updated for any incoming Territories where the time stamp is the same as already assigned Territories.</p> |

## Opportunity Close Effects

This table shows the profile options that affect opportunity close actions.

| Profile Option Display Name                | Default Value | Effect                                                                                                                                                        |
|--------------------------------------------|---------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Close Opportunity Win/Loss Reason Required | Yes           | Determines whether, when closing an opportunity, the user is required to enter a win or loss reason. Applies both at the opportunity and revenue item levels. |
| Close Opportunity Competitor Required      | Yes           | Determines whether, when closing an opportunity, the user is required to enter a competitor. Applies both at the opportunity and revenue item levels.         |

| Profile Option Display Name              | Default Value | Effect                                                                                                                                                                                                                                                                                                                                 |
|------------------------------------------|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Opportunity Close Date Default           | 20            | Determines the number of days after an opportunity is created for the initial close date.<br><br>If you want the application to show a blank close date when an opportunity is initially created, blank out any value in this profile option and ensure the Close Window field in the Edit Sales Method page is blank.                 |
| Opportunity Close Date Retain on Closure | No            | Instructs the application to retain the old close date even after the status of the opportunity or product line is set to a closed status. If you don't set this profile option to yes, then the close date on the opportunity header or product line is updated with the current date when the opportunity or product line is closed. |
| Close Opportunity Flow Enabled           | No            | Enables the Close Opportunity interface to record details about the close.                                                                                                                                                                                                                                                             |
| Close Date Range Maximum Value           | 366           | Specifies the maximum number of days the Close Date Range parameter can be set to. Applies to both revenue and opportunity search.                                                                                                                                                                                                     |

## Opportunity Sales Methods and Revenue

This table lists the profile options that affect the opportunity sales methods and revenue lines.

| Profile Option Display Name                               | Default Value    | Effect                                                                                                                                                               |
|-----------------------------------------------------------|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Search Revenue Filter Default                             | My Revenue Items | Specifies the default value displayed in the Show table filter in revenue search.                                                                                    |
| Multiple Currencies for Opportunity Revenue Lines Enabled | N                | Enables multiple currencies for opportunity revenue lines independently of the opportunity header currency. A value of No synchronizes header currency to the lines. |
| Nonrevenue Credit Allocation Style                        | Proportional     | Specifies the default type of nonrevenue credit allocation split.                                                                                                    |
| Sales Method Default                                      | None             | Specifies the default sales method for the business unit. The value specified is used when creating a new opportunity.                                               |
| Browse Sales Catalog in Opportunities Enabled             | N                | Specifies whether to allow sales personnel to browse the sales catalog from the Products region in the opportunities UI.                                             |



| Profile Option Display Name                 | Default Value | Effect                                                                                                                      |
|---------------------------------------------|---------------|-----------------------------------------------------------------------------------------------------------------------------|
| Opportunity Sales Credit Enabled            | N             | Enables the sales credit interface in the opportunity UI to view and record sales credit allocations for opportunity lines. |
| Opportunity Synchronization Cascade Enabled | Y             | Enables the opportunity cascading logic to keep opportunity summary and revenue lines in synchronization with each other.   |

## Opportunity Team and Partner

This table lists the profile options that affect the team and partner options for opportunities.

| Profile Option Display Name                       | Default Value | Effect                                                                                                                                           |
|---------------------------------------------------|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------|
| Internal Resource Sales Team Access Level Default | Edit          | Determines the default access level for an internal resource added to the sales team.                                                            |
| Internal Resource Sales Team Function Default     | Integrator    | Determines the default function for an internal resource added to the sales team.                                                                |
| Opportunity Resource Deal Protection Period       | 0             | Specifies the default number of days that territory resources are protected to stay on a deal, even if ineligible through territory realignment. |
| Partner Resource Sales Team Access Level Default  | No Access     | Determines the default access level for partner resources added to the opportunity sales team.                                                   |
| Partner Resource Sales Team Function Default      | Integrator    | Determines the default function for partner resources added to the opportunity sales team.                                                       |

## Opportunity Searches

This table lists the profile options that affect opportunity searches.

| Profile Option Display Name                                | Default Value | Effect                                                                                                                                                                                                                            |
|------------------------------------------------------------|---------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Require Additional Criteria for Opportunity Search Enabled | No            | Determines whether additional search criteria, other than close date, is required when you want your search to: <ul style="list-style-type: none"><li>Extend across all opportunities</li><li>Rely on hierarchy rollups</li></ul> |
| Opportunity Number Search Enabled for Simplified UI        | No            | Enables opportunity search by Opportunity Number.                                                                                                                                                                                 |

| Profile Option Display Name                                             | Default Value          | Effect                                                                                                                                                                                      |
|-------------------------------------------------------------------------|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                                         |                        |                                                                                                                                                                                             |
| Opportunity Search Close Period Default                                 | Current Fiscal Quarter | Specifies the default value displayed in the Close Period list of values in opportunity and revenue search.                                                                                 |
| Search Opportunity Filter Default                                       | My Opportunities       | Specifies the default value displayed in the table filter in revenue search.                                                                                                                |
| Opportunity Search Context-Based Data Security Enabled                  | No                     | Enables improved performance of opportunity search.                                                                                                                                         |
| Opportunity Search High Performance Data Security Wrapper Query Enabled | Yes                    | Enables SQL wrapper query on top of data security SQL predicates for improved performance of opportunity search. If disabled, the application uses underlying data security SQL predicates. |
| Opportunity Search Panel Collapsed                                      | Yes                    | Enables a collapsed view of opportunity search panel by default. Set to No to make the expanded view the default view.                                                                      |

## Opportunity Lists and Filters

This table lists the profile options that affect opportunity lists and filters.

| Profile Option Display Name            | Default Value         | Effect                                                                                                                                                                                |
|----------------------------------------|-----------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Opportunity List Show Filter Default   | My Open Opportunities | Specifies the default value for the Show filter in the opportunity list. Enter My Open Opportunities or My Sales Team Open Opportunities.                                             |
| Opportunity List Time Period Default   | Quarter               | Specifies the default time period in the opportunity list. Enter Quarter or Year to set the default to current quarter or current year, respectively.                                 |
| All Open Opportunities List Enabled    | Y                     | Enables the opportunity list to show all open opportunities across all time periods.                                                                                                  |
| Opportunity List Sort                  | N                     | Specifies how you want to sort opportunities. The default is to sort by Win Probability and Name. You can specify to sort by Last Updated Date or you can remove any form of sorting. |
| Sales Historical Snapshot Record Limit | 10000000              | Specifies the maximum number of records retained in the Sales historical snapshot tables.                                                                                             |

| Profile Option Display Name             | Default Value             | Effect                                                                                                                                                                                                                                                              |
|-----------------------------------------|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sales Historical Snapshot Configuration | C=120,D=120,W=58,M=14,Q=5 | Specifies the capture and retention settings for opportunity historical snapshots. C is the number of days to look backward at closed opportunities. D is for number of days, W is for number of weeks, M is for number of months, and Q is for number of quarters. |

## Opportunity Copy Mapping

This table lists the profile option used when copying opportunities.

| Profile Option Display Name | Default Value        | Effect                                                                                                                                                                   |
|-----------------------------|----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Copy Opportunity Mapping    | Copy Opportunity Map | Specify the mapping file name to use when copying an opportunity. The file is used to copy attributes and child objects when creating a copy of an existing opportunity. |

## Modify the Recurring Revenue Forecast Type Profile Option

The profile option, Recurring Revenue Forecast Type (ORA\_MOO\_REV\_RECUR\_FORECAST), controls whether to forecast revenue lines based on every single schedule occurrence or aggregated based on the start date. The default is to forecast on each single occurrence.

Use these steps to change the default value of Each Individual Scheduled Occurrence (ORA\_INDIV\_SCHED\_OCCURRENCE) to the Aggregated Based on Start Date (ORA\_AGGR\_BASED\_ON\_START\_DATE) value so that existing multiple recurring revenues lines are aggregated to a single close date:

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name ORA\_MOO\_REV\_RECUR\_FORECAST in the **Profile Option Code** field.
3. Click **Search**.
4. Change the default value of the profile option from ORA\_INDIV\_SCHED\_OCCURRENCE to ORA\_AGGR\_BASED\_ON\_START\_DATE.
5. Click **Save and Close**.

## Add New Lookup Value for the Function Field in the Teams Subtab of Opportunity

You can specify the job function that a member performs within your opportunity team from within a sandbox. You do this from Application Composer for the Opportunity Team member object. You can also search for the ZCA\_RESOURCE\_FUNCTION from outside a sandbox and add any new functions that you need from there.

Here's how to add a new lookup value for the Function field from the Teams subtab using Application Composer.

1. Sign in to your sales application as the sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigator > Configuration > Application Composer**.
4. Select **Opportunity > Opportunity Team Member > Fields > Standard**, and select the **Function**.
5. Select the **Function** team member fixed choice and edit the **Lookup Type** as per the following example:

The screenshot shows the Oracle Application Composer interface. The left sidebar displays the navigation tree with 'Opportunity Team Member' selected. The main area shows the 'Edit Standard Field: Function' configuration. The 'List of Values' section shows the 'Team Member Function' lookup type selected. A red box highlights the 'Team Member Function' lookup type. A red arrow points from the 'Team Member Function' lookup type to the 'Edit Lookup Type' dialog box.

**Edit Standard Field: Function**

**Appearance**  
Configure how this field will appear when displayed to your users.

\* Display Label: Function  
Help Text:

**Name**  
Each field requires a unique name. Name and description are for internal use only, and are never displayed to users.

Name: MemberFunctionCode  
API Name: MemberFunctionCode

**Constraints**

☐ Required  
☒ Updatable  
☒ Searchable

**List of Values**  
Configure the list of values you want to display in the choice list. Click the search icon to select a predefined lookup type, or create a new one.

\* Lookup Type: Team Member Function

**Edit Lookup Type**

\* Meaning: Team Member Function  
Lookup Type: ZCA\_RESOURCE\_FUNCTION

One or more lookup codes cannot be changed or disabled due to dependencies.

**Lookup Codes**

| Action | View | * Meaning           | * Lookup Code | Enabled                             | Display Sequence |
|--------|------|---------------------|---------------|-------------------------------------|------------------|
|        |      | Account manager     | ACCOUNT_MA... | <input checked="" type="checkbox"/> |                  |
|        |      | Channel manager     | CHANNEL_MGR   | <input checked="" type="checkbox"/> |                  |
|        |      | Engineering manager | ENGINEERIN... | <input checked="" type="checkbox"/> |                  |
|        |      | Executive sponsor   | EXECUTIVE_... | <input checked="" type="checkbox"/> |                  |

6. Click **Save and Close**.

You can also search for and access the ZCA\_RESOURCE\_FUNCTION lookup from the manage lookups tasks outside a sandbox

Here's how to search for predefined lookups using any of the manage lookup tasks:

1. In the Setup and Maintenance work area, go to any of the following tasks that contains the lookups you're looking for:
  - Manage Standard Lookups
  - Manage Common Lookups
  - Manage Set-enabled Lookups
2. Enter any of the search parameters and click Search. If you don't know the lookup type or the meaning, use the Module field to filter search results.
3. Click a lookup type to view its lookup codes.

Please see [Overview of Lookups](#) for more information about lookup types.

## FAQs for Opportunities

### Frequently Asked Questions (FAQs) for Opportunities

This section contains some frequently asked questions (FAQs) when setting up and maintaining core opportunities functionality. Scroll or search to find answers to common questions.

### How do I access the Revenue-to-Opportunity status category mapping matrix?

You can access the Revenue-to-Opportunity Status Category Mapping matrix by searching for the Manage Sales Status Category Mapping task from the Setup and Maintenance work area.

There are four predefined sales statuses and status categories such as Lost, No Sale, Open, and Won. Salespeople can select these statuses for an opportunity or for a product line while editing an opportunity. The application uses status categories when calculating business intelligence metrics for win/loss analysis. Status categories aren't visible in the UI but sales statuses are.

#### *Related Topics*

- [How do I modify sales statuses?](#)

### What QBE values are supported in the Sales Status setup page?

You can use only Y and N in the query by example (QBE) field located above the Active column in the Manage Sales Statuses page.

#### *Related Topics*

- [How do I modify sales statuses?](#)

## How can I restrict Account owners and Account team members from viewing Opportunities?

You need to define a custom role so that members of the Account Team or Account Territory can't view opportunities associated with the account unless they're also members of the opportunity team.

For example, the predefined Sales Representative role has the following duties added:

- Opportunity Sales Representative Duty
- Opportunity Territory Resource Duty
- Opportunity Sales Account Sales Representative Duty
- Opportunity Sales Account Territory Resource Duty

Define a custom role similar to Sales Representative but without the Opportunity Sales Account Sales Representative Duty and Opportunity Sales Account Territory Resource Duty duties. To restrict opportunity visibility based on the Opportunity Owner, Team or Territory, assign users a custom role that has only the following duties:

- Opportunity Sales Representative Duty
- Opportunity Territory Resource Duty

See the related topics in the Securing Sales and Fusion Service guide for more information on modifying the default roles.

#### *Related Topics*

- [Guidelines for Copying Roles](#)
- [Copy Job or Abstract Roles](#)

## Can partner users view, add, and modify opportunity team members?

Yes, depending on their resource security, partner users can access opportunity team members based on their roles or access groups they belong to.

For more information about access groups, see the Access Groups chapter in the Securing CX Sales and Fusion Service guide.

## How can I differentiate between copied Opportunities and Opportunities created using Create button?

You can create a Groovy script to help you identify opportunities that were copied from those opportunities that were created using the Create button from the UI.

Here's how.

1. Navigate to the Opportunity object in Application Composer.
2. Create a custom field called **OptyIdCopyText** and enter the expression **getAttribute(OptyId)exp** as its default value.
3. From Server Scripts area, insert the following sample Groovy script before the insert trigger. This script differentiates between copied Opportunities and Opportunities created using **Create** from the UI.

```
if (OptyId.toString().equals(OptyIdCopyText_c)) {  
  
    return false  
  
}  
else  
{  
    setAttribute('DateatSalesStage1_c', null)  
    setAttribute('DateatSalesStage2_c', null)  
    setAttribute('DateatSalesStage3_c', null)  
    setAttribute('DateatSalesStage4_c', null)  
    setAttribute('DateatSalesStage5_c', null)  
    setAttribute('DateatSalesStage6_c', null)  
  
}
```

4. Click **Save and Close**.

For more information about groovy scripting, see the [Oracle Applications Cloud Groovy Scripting Reference](#).





# 24 Opportunity Products and Revenue

## Considerations for Setting Up Opportunity Revenue

The sales opportunity revenue model allows several feature configuration options during and after implementation. For example, you can make some fields read-only and modify lookups to meet your unique business needs.

### Revenue Amount and Revenue Type

Consider the following options about the Revenue Amount and Revenue Type fields:

- You may want to configure opportunities with Revenue Amount as a read-only field. This setup ensures that the revenue amount reconciles with quantity and estimated price. By default, the Revenue Amount is editable for cases where salespeople know a projected revenue amount but may not know the quantity. You can make the revenue amount read-only through configuration. For general information about configuring applications, see the *Configuring Applications Using Application Composer* guide. You can find information on extending opportunity revenue pages in the chapters on extending business objects in this guide.
- Using Revenue Type, you can categorize revenue lines for grouping, sorting, and summarization purposes. The maximum number of opportunity revenue lines for a single opportunity is 500. The application comes with several predefined values, such as Pipeline, Upside, Expected, Committed, and Closed. Stored in the lookup MOO\_REVENUE\_TYPE, the values are user-defined.

**CAUTION:** You should avoid changing these values after users have begun using the application, as data integrity issues may result. If you do decide to obsolete existing values after the application is deployed, be sure to clean up the revenue records that refer to the obsolete values.

### Product Selection

Consider the following options for product selection:

- To enable users to browse the sales catalog, you must set the profile option, Browse Sales Catalog in Opportunities Enabled (MOO\_ENABLE\_BROWSE\_CATALOG), to Yes.
- The product and product group search screens and sales catalog filter by territory. This filtering limits the product selection to those products available in a salesperson's territories. A check box in the product search pages lets salespeople turn off the filtering. For more information about this setup, see the topic, Set Sales Catalog Options and Actions in the Sales Catalogs chapter.
- The product and product group search screens contain the same values as those in the sales catalog, if implemented.

### Sales Credit Assignment

Consider the following rules around sales credit assignment:

- To enable the Sales Credit icon in the opportunity products table, you must set the profile option, Opportunity Sales Credit Enabled (MOO\_ENABLE\_SALES\_CREDITS) to Yes.

- The application automatically assigns the salesperson who added the product line to the opportunity one hundred percent of the sales revenue credit, and makes him the default sales credit recipient.
- Users need Full or Edit permissions to override the default sales credit recipient.
- The territory assignment process can update credit recipients, unless they're locked in.

For more information about how salespeople assign sales credits in opportunities, see the *Using Sales* guide. Also see the related setup topics for sales credits.

## Business Units

Each product line is associated with a single business unit. The application uses the opportunity header business unit (which is based on the profile of the user who created the opportunity) to populate the default business unit on product lines. Business unit as a field isn't displayed in the UI by default, but it can be exposed to suit your requirements.

- For more information about multiple business units in opportunities, see the topic, *Overview of Multiple Business Units in Opportunities*.
- For more information about configuring applications, see the *Configuring Applications Using Application Composer* guide.

## Multicurrency Support

Opportunities and product lines support multiple currencies, if multiple currencies have been implemented. When a salesperson adds a product or product group to an opportunity, the application uses the opportunity header currency as the default currency on the product line. However, salespeople can override the default currency. For more information about currency setup, see the topic, *Set Up Multiple Currencies*.

## Territory Assignment

When you're using territory-based assignment, the assignment engine automatically assigns territories to product lines. Territory team members on the territories are assigned to product lines based on their membership in the territories. For more information about territory setup, see the topics on setting up territories.

### *Related Topics*

- [Guidelines for Setting Forecasted Opportunity Revenue](#)

## Enable the Products Subtab in Opportunities

You can expose the Products subtab in the Edit Opportunity page to let salespeople view more revenue line items at a glance. By default, the Products subtab doesn't appear in the Edit Opportunity page.

Here's how to expose the Products subtab in the Edit Opportunity page.

1. Activate a sandbox.
2. Navigate to **Application Composer**, in the Configuration category.
3. Select **Sales**.
4. In the navigation tree, expand **Standard Objects**, expand **Opportunity**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.

6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.
8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.  
The Configure Subtabs dialog box appears.
9. Move Products from the Available Subtabs to the Selected Subtabs window.
10. Click **OK**.
11. From the Details Layout page, click **Done**.
12. Make sure that the layout status for your layout is set to Active.
13. Test the changes as follows:
  - Navigate to **Sales > Opportunity** as a user with access to the opportunity pages, for example, as a salesperson.
  - Edit an opportunity and ensure you can view the Products subtab in the Edit Opportunity page.
14. Publish the sandbox.

For more information, see the related topics in the Configuring Applications Using Application Composer guide.

#### Related Topics

- [Overview of Subtabs](#)
- [Overview of Sandboxes](#)

## Enable Quick Edit to Opportunity Products

An opportunity can have a large number of products. If changes are required, salespeople have to modify product lines with lots of attributes, often a time-consuming task.

So to make the task easier, use Application Composer to let salespeople quickly navigate to a secondary dialog window to add new or edit existing product lines. From the products area of the opportunities UI, they can add, view, edit, close, go to next and previous records in a dedicated dialog box.

Here's how to enable the product line dialog box:

1. Activate a sandbox.
2. Navigate to the Application Composer, available under the Configuration menu.
3. Expand the **Opportunity** object tree.
4. In the Opportunity tree, click the **Pages** link.
5. In the Details Page Layouts region, duplicate the standard layout and edit the resulting layout.
6. From the Edit Revenue Table region, click the edit icon.
7. Click these check boxes:
  - **Enable Separate Create Pages** check box to control how new product line records are added.  
If you enable this check box, salespeople can click **Add** to display a dedicated **Add Product** dialog box where they can add new product lines.
  - **Enable Separate Edit Pages** check box to control how existing product line records are edited.

If you enable this check box, salespeople can click the link in the **Name** field to display a dedicated **Edit Product** dialog box for the product line records they want to change.

8. Click **Save and Close**.
9. Back in the Details Layout page, click **Done**.
10. Ensure that the layout status for your user-defined layout is Active.
11. Test the changes: Navigate to **Sales > Opportunities** as a user with access to the Edit Product page, for example, as a salesperson. Click the **Name** link for the product or group you want and ensure that a dedicated **Edit Product** dialog box is displayed.
12. Publish the sandbox.

## Forecasted Revenue

### Guidelines for Setting Forecasted Opportunity Revenue

The application includes opportunity revenue in the current sales forecast based on how you set up the forecast criteria. If enabled, you can see which revenue items are included in the forecast and you can include or exclude revenue from the forecast.

You can also include or exclude an entire opportunity, and thus its revenue from products, if enabled.

#### Examples of Forecasted Opportunity Revenue

You use the Edit Opportunity page revenue (or products) region to view which revenue items are in the current forecast. A check mark in the **Forecast** column of a revenue line indicates that the revenue is included in the forecast the next time it's generated.

**Note:** A revenue item marked as forecasted doesn't necessarily mean that it's already included in the latest forecast. The inclusion is dependent upon when the refresh forecast process was last run. For example, a revenue item may meet the current forecasting criteria, but the latest forecast may have already been submitted when the revenue was added to the opportunity. When the next forecast snapshot is generated, the revenue item is included, provided it continues to meet the forecast criteria.

Revenue is included in the forecast based on how the configuration of the forecast rules. Here are some examples of how forecasted opportunity revenue operates:

- Opportunity revenue can be systematically added to the forecast based on a set of global criteria specified during setup.
- **Include in Forecast** drop-down list:

You can enable a drop-down list called **Include in Forecast**. The drop-down list appears in both the opportunity and revenue (products) region.

In the Edit Opportunity page, you can override the criteria for an entire opportunity or for individual opportunity revenue items by using the **Include in Forecast** drop-down list.

- The application changes the **Include in Forecast** setting dynamically when you make changes to any of the following revenue attributes in the opportunity page. (The corresponding forecast is only updated when you save your changes.)

- Product Group
  - Quantity
  - Estimated Price
  - Revenue
  - Win Probability
  - Revenue Type
  - Expected Revenue
  - Status
- The application always includes in the forecast revenue items that have a status category of Won.

#### Related Topics

- [Considerations for Setting Up Opportunity Revenue](#)
- [Set Opportunity Revenue Forecast Criteria](#)

## Set Opportunity Revenue Forecast Criteria

You can control how the opportunity revenue forecasting criteria operates by setting these two sales forecasting fields:

- **Enable Forecast Criteria Override:** You can control the appearance and effect of the **Include in Forecast** list of values in the Edit Opportunity header and revenue (products) region.
- **Forecasting criteria:** You can pick one of several different criteria for including revenue in the forecast. After you set criteria, the text, Forecast Criteria, along with the actual criteria, display in the revenue region.

You set these fields in the Select Forecasting Options page, **Unadjusted Forecast Criteria** region. This page is accessible by using the Setup and Maintenance work area and selecting the Forecasting Options task. For more information about creating forecasts, start with the topic, [What are some common opportunity forecasting scenarios?](#)

### Set Forecast Criteria

Use this procedure to set forecast criteria:

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Sales Forecasting
  - Task: Select Forecasting Options
2. In the **Unadjusted Forecast Criteria** region of the Select Forecasting Options page, set the criteria as you want.

The remaining sections in this topic describe the impact of setting the criteria fields for opportunity revenue lines.

For more information about other forecasting setups not covered in this topic, see the help. Use keywords "forecasting" and "forecast".

## Forecasting Criteria for Product Lines

You can specify one of several different criteria by which opportunity product line revenue is included in the current forecast. Here are the supported criteria. All of the criteria are fields in the products region of the Edit Opportunity page.

- Estimated Price
- Expected Revenue
- Probability
- Product Group
- Quantity
- Revenue (amount)
- Revenue Type
- Status

## Impact of Enabling Forecast Criteria Override

If you check the **Enable Forecast Criteria Override** field in the Select Forecasting Options page, then a choice list appears in the opportunity UI called **Include in Forecast**. The list appears both in the opportunity header area and the products region. Salespeople can use the field to manually add or remove revenue from the current forecast. If the choice list is enabled, salespeople can add revenue to the forecast even if the revenue doesn't fit the current forecast criteria. Additionally, the impact of the opportunity UI changes depend on whether you also have set up forecasting criteria. For example, you might have set up a win probability percentage that must be met before a revenue item gets included.

This table explains how the application operates if you have set up forecasting criteria in the **Unadjusted Forecast Criteria** region in the Select Forecasting Options page.

| Enable Forecast Criteria Override Checked                                                                                                                                                                                           | Enable Forecast Criteria Override Unchecked                                                                                   | Forecast Criteria Text Appears in Opportunity UI |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|
| The Include in Forecast list of values displays in the UI, allowing sales personnel to select from these options: <ul style="list-style-type: none"><li>• Always</li><li>• Never</li><li>• When matches forecast criteria</li></ul> | The Include in Forecast list of values doesn't appear. The default value for revenue items is When matches forecast criteria. | Yes                                              |

This table explains how the application operates if you haven't set forecasting criteria in the **Unadjusted Forecast Criteria** region in the Select Forecasting Options page.

| Enable Forecast Criteria Override Checked                                                                                                                                  | Enable Forecast Criteria Override Unchecked                                                                                   | Forecast Criteria Text Appears in Opportunity UI |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------|
| The Include in Forecast list of values displays in the UI, allowing sales personnel to select from these options: <ul style="list-style-type: none"><li>• Always</li></ul> | The Include in Forecast list of values doesn't appear. The default value for revenue items is When matches forecast criteria. | No                                               |

| Enable Forecast Criteria Override Checked             | Enable Forecast Criteria Override Unchecked | Forecast Criteria Text Appears in Opportunity UI |
|-------------------------------------------------------|---------------------------------------------|--------------------------------------------------|
| <ul style="list-style-type: none"><li>Never</li></ul> |                                             |                                                  |

#### Related Topics

- [Considerations for Setting Up Opportunity Revenue](#)
- [Guidelines for Setting Forecasted Opportunity Revenue](#)
- [How do I update existing setup data?](#)

## Modify the Recurring Revenue Forecast Type Profile Option

The profile option, Recurring Revenue Forecast Type (ORA\_MOO\_REV\_RECUR\_FORECAST), controls whether to forecast revenue lines based on every single schedule occurrence or aggregated based on the start date. The default is to forecast on each single occurrence.

Use these steps to change the default value of Each Individual Scheduled Occurrence (ORA\_INDIV\_SCHED\_OCCURRENCE) to the Aggregated Based on Start Date (ORA\_AGGR\_BASED\_ON\_START\_DATE) value so that existing multiple recurring revenues lines are aggregated to a single close date:

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name ORA\_MOO\_REV\_RECUR\_FORECAST in the **Profile Option Code** field.
3. Click **Search**.
4. Change the default value of the profile option from ORA\_INDIV\_SCHED\_OCCURRENCE to ORA\_AGGR\_BASED\_ON\_START\_DATE.
5. Click **Save and Close**.

## Sales Credits

### Best Practices for Sales Credits

Companies use sales credits to report on the performance and quota attainment of their sales personnel. They also use sales credits to aid in compensation calculation and to facilitate forecasting by territories.

Sales credit recipients and revenue amounts roll up the resource hierarchy for pipeline reporting and quota attainment. You assign sales credits to sales resources (salespeople or other sales users) while editing product lines in opportunities.

When a product line is first added to an opportunity, the application sets the user who added it, as the sole sales credit recipient. This means that the sole recipient receives 100 percent of the sales credit.

Two types of sales credit exist for opportunities:

- Revenue sales credit: Typically allocated to salespeople working the deal.
- Overlay sales credit: Typically allocated to other resources helping out with the deal, such as a product or market specialist. Overlay sales credit is also known as nonrevenue sales credit.

## Revenue Sales Credit

When assigning revenue sales credits, keep in mind:

- Only internal resources are eligible as revenue credit recipients.
- Revenue sales credits must add up to 100 percent.
- The Forecast Territory can be set to any territory assigned to the product line with **Revenue Or Revenue and Nonrevenue Forecast Participation**.

## Overlay Sales Credit

When assigning overlay sales credits, keep in mind:

- Both internal and external (for example, partner) resources are eligible as nonrevenue credit recipients.
- Nonrevenue sales credits doesn't have to add up to 100 percent.
- If the selected Allocation Style is **Proportional to Revenue**, the sales credit amounts adjust automatically and proportionally when the product line amount changes.
- If the selected Allocation Style is **Ad Hoc Amounts** the sales credit amounts don't change with product line amount changes.
- The Forecast Territory can be set to any territory assigned to the product line with **Revenue Or Revenue and Nonrevenue Forecast Participation**.

**Note:** Territories with a Forecast Participation of **Nonforecast** aren't eligible to be set as the forecast territory on either revenue or nonrevenue sales credits.

## Configure Revenue Territory Default Assignment

You can configure the revenue territory assignment default logic to meet your specific business needs for reporting and forecasting the product amounts on an opportunity. When a sales representative creates an opportunity, the opportunity amount gets reported in the sales representative's pipeline and forecasted in their territory. This is achieved through the seeded defaulting logic, part of the revenue territory assignment process, that sets the appropriate credit recipient and forecast territory on the opportunity product lines.

Some companies have territory setup that may result in many overlapping territories assigned to the opportunity products. They may have specific business logic that determines to whom the pipeline from an opportunity should be reported and forecast. For example, the opportunity creator may not be the owning sales representative. Instead the owner of the sale may be determined by the role or geography of the sales representative involved in closing the sale, or the business unit of the sale. Many of these scenarios can be met through appropriate territory setup, the standard revenue territory assignment processing, and subsequent sales credit recipient and forecast territory defaulting logic.



**Note:** A sales credit recipient selected by a user doesn't get replaced by the application unless the recipient is no longer a qualified credit receiver. The application won't change the recipient if:

- The Lock Owner setting for the revenue item is enabled
- The current credit recipient is under deal protection.
- The current credit recipient is an owner or member of the forecast territory.

The application sets the forecast territory owner as the new credit recipient if the preceding criteria isn't met.

This table outlines the predefined deal protection logic to set the forecast territory for each revenue line in the sales credit.

| If you're using Deal protection...                                                                                                                                                                                                                                             | If you aren't using Deal protection...                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sets the owner of the revenue line as the Forecast territory's owner. As a result, multiple revenue lines have the same owner after assignment.                                                                                                                                | Sets the owner of the revenue line as the owner of the forecast territory after setting the Primary forecast territory of the sales credit revenue line.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
| You can make the revenue line owner deal protected by setting a deal protection period in the MOO_DEAL_PROTECTION_PERIOD profile option. Go to <b>Setup and Maintenance &gt; Manage Opportunity Profile Options</b> and set MOO_DEAL_PROTECTION_PERIOD to a value as required. | <p>If you need to bypass setting the owner of the revenue line as the owner of the forecast territory, you will have to lock the owner either through running a Groovy script while adding the Sales Credit Recipient (SCR). Alternatively, you can set the MOO_DEAL_PROTECTION_PERIOD profile option, as required.</p> <p>In the trigger <code>createNonRevenueSplitLineAndAssignSCR</code> add the following lines in places where you're adding the SCR.</p> <pre>splitNonRevenueRow.setAttribute('OwnerLockAsgnFlag','Y');</pre> <p>This will retain the resource that you're adding to the overlay from the territory resources.<br/>From the script, the places are as follows:</p> <pre>1. //===== // Block of code to create Non-Revenue Sales Credit Splits //===== def splitRevenueNonQuotaIterator =     nvl(getAttribute("SplitRevenueNonQuota"),null); splitRevenueNonQuotaIterator?.reset(); if (!splitRevenueNonQuotaIterator?.hasNext()) {     splitNonRevenueRow = splitRevenueNonQuotaIterator.createRow();      splitNonRevenueRow.setAttribute('SplitParentRevId',getAttribute("RevId"));     splitNonRevenueRow.setAttribute('SalesCreditTypeCode','NONQUOTA');     splitNonRevenueRow.setAttribute('SplitPercent',60);     splitNonRevenueRow.setAttribute('OwnerLockAsgnFlag','Y'); //&lt;--Added code here     splitNonRevenueRow.setAttribute('ResourcePartyId',Opportunity?.OwnerResourcePartyId);     println('Opportunity?.OwnerResourcePartyId     '+Opportunity?.OwnerResourcePartyId)     setAttribute('ResourcePartyId',Opportunity?.OwnerResourcePartyId)  2. if (splitRevenueNonQuotaIterator1?.hasNext()) {     splitNonRevenueRow = splitRevenueNonQuotaIterator1.createRow();</pre> |

| If you're using Deal protection... | If you aren't using Deal protection...                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                    | <pre>splitNonRevenueRow.setAttribute('SplitParentRevId',getAttribute("RevId")); splitNonRevenueRow.setAttribute('SalesCreditTypeCode','NONQUOTA'); splitNonRevenueRow.setAttribute('SplitPercent',84); splitNonRevenueRow.setAttribute('OwnerLockAsgnFlag','Y'); //Added code here splitNonRevenueRow.setAttribute('ResourcePartyId',newSCR); splitRevenueNonQuotaIterator1.insertRow(splitNonRevenueRow); setAttribute('SplitTypeCode','PARENTSPLIT'); setAttribute('ResourcePartyId',newSCR); println('Inside IF SET ATTRIBUTE.. (! splitRevenueNonQuotaIterator1?.hasNext())...SplitTypeCode' +SplitTypeCode)</pre> |

## Manual Territory Assignment by Administrators

In the sales credits screens, sales administrators can manually assign a sales representative's territory to a product line when the territory hasn't been assigned automatically. Manual assignment allows sales personnel to forecast an opportunity immediately while the territory setup is being reviewed and updated.

### Related Topics

- [Sales Credit Recipient and Forecast Territory Predefined Logic](#)
- [Set Deal Protection on Opportunities](#)
- [Allocate Sales Credits](#)
- [How can I lock in a sales credit recipient?](#)

## Enable Sales Credits

To enable sales credit functionality in opportunities, you must set the profile option, Opportunity Sales Credit Enabled (MOO\_ENABLE\_SALES\_CREDITS).

If the value of the profile option is Y, the Sales Credit column displays in the opportunity Products table, and the editable sales credit icon displays on product lines. The sales credits icon lets salespeople access the pages where they assign revenue and nonrevenue (overlay) sales credit to other users. For more information, see the related topics.

## Prerequisites

Keep in mind the following prerequisites when salespeople assign sales credits in opportunities:

- Territories have been set up and your company is using territories for assignment of opportunity products.
- The user must have Full access to the opportunity to assign sales credits.

## Set the Sales Credit Profile Option

Here's how to set the sales credit profile option.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Opportunity Profile Options
2. In the search region of the Manage Opportunity Profile Options page, search for the profile option, Opportunity Sales Credit Enabled (MOO\_ENABLE\_SALES\_CREDITS).
3. In the search results, click the profile option name.
4. Set the profile option value to Y.
5. Save your changes.

### Related Topics

- [Sales Credit Recipient and Forecast Territory Predefined Logic](#)
- [Best Practices for Sales Credits](#)
- [Allocate Sales Credits](#)
- [How do I update existing setup data?](#)

## Recurring Products

### Overview of Recurring Opportunity Products

Recurring schedules in opportunities enables you to enter and track opportunity products or product groups that are part of a subscription business model.

The subscription business model applies to the sale of goods, software, or services where the customer is required to pay a subscription price for access to the goods, software, or services, with additional usage or pay-as-you go charges in some cases. Some examples are:

- Data and phone services
- Credit collection or payment processing services
- Software, platform, or data-as-a-service costs
- Magazine subscriptions
- Product life cycle costs
- Engineering and infrastructure services

The subscription model can encompass both business-to-business (B2B) and business-to-consumer (B2C) customers. For example, a telecommunications company may sell mobile phone services to individuals, and multiple phone lines to a business for their employees. The supplier of these services typically charges the customer a periodic rate applicable to the plan that they subscribed to.

After you define a schedule for a subscription product or service, the application creates the recurring transactions from the frequency and the number of transactions specified in the schedule. There are several time frequencies to choose from, such as weekly, monthly, quarterly, yearly, and so on. The multiple frequencies make it easy to set up a recurring schedule, like a monthly subscription for three years, or a biweekly annual subscription. You can review the schedule and quickly add a one-time registration or installation fee, and adjust the amount or date of any transaction.

Subscription changes are easy to manage. If there is a change in the terms or price of the subscription, you can quickly define a new schedule to replace the previous one. If the original subscription is extended, say, for another year, you can easily extend the existing schedule on the product for the period that you want.

Product amounts from recurring schedules are summed into the corresponding quarterly or yearly periods, and are readily available in pipeline reports and forecast rollups for you and sales managers.

#### Related Topics

- [Create and Maintain Recurring Opportunity Products](#)

## Enable Recurring Opportunity Products

To enable recurring opportunity products, use Oracle Application Composer to add the Schedule column to the opportunities UI.

You access the recurring schedules pages from the schedule icon in the Schedule column of the edit opportunity page. For more information about recurring opportunity products functionality, see the related topics.

### Add the Schedule Column

Here's how to add the Schedule column to the edit opportunity page from Application Composer.

**Note:** When modifying the UI, you must make your changes in a sandbox. See the [Configuring Applications Using Application Composer](#) guide for more information about using sandboxes.

1. Create and activate a sandbox to work in.
2. Navigate to **Application Composer**.
3. In the Application Composer page, select **Sales** as the object.
4. Expand Standard Objects and navigate to **Opportunity**, then **Pages**. The Opportunity: Pages page appears.
5. In the Opportunity: Pages page, ensure that the **Application Pages** tab is active.
6. In the Details Page Layouts region, select the **Default Layout** in the table and then click the edit icon. The Details Layout: Default Layout page appears.

Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.

7. In the Edit Revenue Table region, click the edit icon.
8. In the Details Layout: Default Layout: Edit Revenue Table page, find the **Schedule** field in the Configure Summary Table window. Move the field from the Available Fields window to the Selected Fields window.
9. Click **Save and Close**.
10. Click **Done** in the Details Layout: Default Layout page.

11. Validate the change by navigating to the edit opportunity page and ensuring that you can see the Schedule field in the Products table.  
Note that the user you sign in as to validate the change must belong to a sales resource organization. For example, you must sign in as a sales representative.
12. Publish the sandbox.
13. The Schedule field is now available to sales users in the edit opportunity pages.

#### Related Topics

- [Manage Fields for Recurring Opportunity Products](#)
- [Overview of Recurring Opportunity Products](#)
- [Create and Maintain Recurring Opportunity Products](#)

## Manage Fields for Recurring Opportunity Products

You can add and modify fields to the recurring schedules UI in opportunities. You can also rearrange the frequency values that salespeople can choose from when creating a recurring schedule.

For more information about recurring opportunity functionality, see the related topics.

### Configure Additional Fields

You can use Oracle Page Composer to enable additional fields in the recurring schedule UI, to meet your specific requirements.

The fields you can enable are:

- Expected Revenue
- Status
- Win Loss Reason
- Estimated Price
- Best Case
- Worst Case
- Win Probability
- Additional Number 1
- Additional Amount 1
- Additional Text 1
- Additional Text 2

**Note:** You can't add custom fields to set schedule and manage schedule pages in the recurring schedule UI.

Here are the steps to enable these fields:

**Note:** To perform this procedure, you must have already enabled the Schedule icon in the Products table in the Edit Opportunity page. For more information, see the topic, [Enable Recurring Opportunity Products](#).

1. Click **Navigator > Sales > Opportunities**.
2. Create and activate a sandbox to work in.
3. Click your user name in the global header and select **Edit Pages**.
4. Select a layer that you want to modify. For example, you can make the changes available only to users with a specific job role, such as sales representatives. Click **OK** to commit the modified layer.
5. When modifying work areas, you start in the Design view. Design view lets you navigate to the component you want to modify.
6. Click an opportunity to edit it.

The Edit Opportunity page appears.

7. Click the **Schedule** icon in the Products table.

The Manage Schedule page appears.

8. Click **Select**.
9. Hover over the last column in the Transactions table header row until a border appears. Click the edge of the border.
10. In the menu that appears, click **Edit Parent Component**.

The Component Properties window appears.

11. Click the **Children** tab.
12. Select the fields you want to enable.
13. Click **Close** to save.

You can use a similar procedure to modify the Set Schedule Page.

For more information about using Application Composer and Page Composer, see the *Configuring Applications Using Application Composer* guide.

## Change the Display Order of Frequencies

When you create a recurring schedule, you must select a value, such as monthly, from the Frequency field. You can change the display order of the frequencies that display in the list. For example, you can make the Monthly value the first one in the list. You make these changes by modifying the supplied lookup type, MOO\_RECURRING\_FREQUENCY.

Here's how to change the display sequence.

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Standard Lookups
2. In the Lookup Type field of the Manage Standard Lookups page, enter `MOO_RECURRING_FREQUENCY` and search. Or, you can enter `Sales Recurring Revenue Frequency` in the **Meaning** field and search.
3. In the list of values, reorder the items as needed by changing the numbering in the **Display Sequence** column.

The value that has the lowest display sequence is the one that's set as the default value.
4. Click Save and Close.

#### Related Topics

- [Enable Recurring Opportunity Products](#)
- [Overview of Recurring Opportunity Products](#)
- [Create and Maintain Recurring Opportunity Products](#)
- [How do I update existing setup data?](#)
- [Overview of Sandboxes](#)

## Additional Implementation Considerations for Revenue

### Opportunity and Product Line Attributes Synchronization

Opportunities and their product lines share common attributes, for example, status or win probability percentage. For several attributes, under certain conditions, the application automatically synchronizes them so that they're the same.

In addition, the application updates certain opportunity and product line attributes based on the values of other attributes. The attributes that the application synchronizes or updates automatically are:

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

**Note:** An attribute is said to be synchronized if its opportunity and product line values are the same, and if the product line is in the same status category as its opportunity. If a product line and its opportunity both have undefined values, they're considered to have the same value.

### Synchronization of Opportunity and Product Line Attribute

The application synchronizes certain product line attributes based on the opportunity-level attribute, under certain conditions.

Synchronization occurs for these attributes:

- Win probability
- Close date
- Include in forecast setting
- Status (not status category)

Here is an example of close date synchronization:

- An opportunity with an Open status category has a close date of July 14, 2018.
- Product lines 1, 2, and 3 have the same close date and they're in the same status category.

- Product line 4 has a different close date, but the same status category.
- The close date of the opportunity is changed to August 14, 2018. The application automatically sets the close dates of product lines 1, 2, and 3 to the same close date as that of the opportunity. The close date of product line 4 remains unchanged, because it has close date that wasn't already synchronized with the date of the opportunity.

## Opportunity Status Updates

These scenarios explain what happens when the opportunity status is updated. Note that status values display in alphabetic order on the UI.

- Opportunity status is updated to a Won status:
  - The application updates the opportunity win probability to 100 percent. It also updates all synchronized product lines' win probability to 100 percent.
- Opportunity status is updated to a Lost or No Sale status:
  - The application updates the opportunity close date to the current date. It doesn't update the close date on synchronized product lines.
- Opportunity status is updated from an Open status to a Closed status:
  - The application enables the opportunity win/loss reason attribute.
  - If an opportunity primary competitor has been defined, the application updates the product line competitor to the opportunity primary competitor for all opportunity product lines, if they aren't already defined. This action applies only to the close opportunity and mass update opportunities flows.
- Opportunity status is updated from a Closed status to an Open status:
  - The application disables the opportunity win/loss reason attribute.
  - The application sets the opportunity win/loss reason attribute to "undefined". It doesn't update the win/loss reason on synchronized product lines.

## Product Line Status Updates

These scenarios explain what happens when the product line status is updated:

- Product line status is updated to a Won status: The application sets the product line win probability to 100 percent.
- Product line status is updated to a Lost or No Sale status: The application sets the product line close date to the current date.
- Product line status is updated to a Closed status: The application enables the product line win/loss reason attribute.
- Product line status is updated to an Open status:
  - The application disables the product line win/loss reason attribute.
  - The application updates the product line win/loss reason attribute to "undefined".



## Opportunity Win/Loss Reason Updates

When an opportunity is in an Open status, the opportunity win/loss reason attribute is disabled. Win/loss reason is activated when the opportunity is set to a Closed status. When the opportunity win/loss reason is updated, the application updates all opportunity product lines where the win/loss reason attribute is synchronized.

**Note:** If the opportunity line item status is set to inactive, then Reason field is editable in the List view so that you can include a reason why the line item isn't active. However, the Reason field isn't editable on the Form view of the Opportunity Line Item. This is expected behavior due to the difference in the page structure. The edit page from the List view has a table view for Revenues, while the Form page has a form view and is therefore not editable.

## Opportunity and Product Line Competitor Updates

If a primary competitor has been defined at the opportunity level, when the opportunity status changes from an Open status to a Closed status, the application updates the product line competitor to the primary competitor for all lines that don't already have a competitor.

**Tip:** If a product line without a competitor is set to closed and the opportunity is saved, the application displays a dialog box that lets you copy the opportunity primary competitor to the product lines without competitors.

This action applies only to edit opportunity and close opportunity flows. It doesn't apply to the mass update flow.

### Related Topics

- [Set Opportunity Revenue Forecast Criteria](#)
- [Example of Product Line Synchronization with Win Probability](#)

## Add Attributes for Opportunity Summary and Revenue Lines Synchronization

You can enhance and perform opportunity summary and revenue line synchronization for some attributes using Groovy scripting. Use the sample scripts in this topic to add rule definitions to the predefined opportunity cascading logic.

The rule definitions keep opportunity summary and revenue lines in synchronization with each other. Here's how to add specific attributes for opportunity summary and revenue lines synchronization:

1. Sign in as a sales administrator or a setup user.
2. Navigate to Application Composer.
3. Select **Sales** to filter the object search.
4. Expand **Standard Objects** and then expand **Opportunity**.
5. Under Opportunity, click **Server Scripts**.

The Server Scripts Help Request page opens.

6. Under Validation Rules tab, select **Action - Add** under the Field Rules region and enter values as shown in the following example:

| Field           | Value                                                                                                                                                                                                                                                                                    |
|-----------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Field Name      | Choose the field or attribute that you want from the drop-down list of values.                                                                                                                                                                                                           |
| Rule Name       | Enter a meaning full name for the rule.                                                                                                                                                                                                                                                  |
| Error Message   | Enter a user-defined error message, for example, a message that warns the user the synchronization cascade has failed.                                                                                                                                                                   |
| Rule Definition | In the script text field, cut and paste the script that you have written to validate the condition. For example, see the sections Sample Groovy Scripts for Opportunity Attributes and Sample Groovy Scripts for Opportunity Revenue Attributes in this topic for sample groovy scripts. |

7. Click **Save and Close**.

For a more detailed explanation of Groovy scripting using Application Composer, see the Oracle Applications Cloud Groovy Scripting Reference.

## Sample Groovy Scripts for Opportunity Attributes

This table contains sample groovy script code for a subset of opportunity attributes:

| Attribute                                                                                                                                                                                                                                                      | Sample Groovy Script                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Close Date                                                                                                                                                                                                                                                     | <pre>cascadeInSyncValueToAllRevenues("EffectiveDate", oldValue, newValue)  return true</pre>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Status and StatusCodeSetId<br><br>Both the Status and StatusCodeSetId attributes have to be assigned together. If you decide to selectively enable synchronization cascade for Status, then you must also perform synchronization cascade for StatusCodeSetId. | <pre>// For Status def cache_name = '_statuscode_insync_cascade' if (oldValue == 'OPEN' &amp;&amp; newValue == 'WON') { // Only allow synchronization cascade if Status moved from OPEN to WON. cascadeInSyncValueToAllRevenues("StatusCode", oldValue, newValue)  // Mark this opportunity's StatusCode as having been synchronization cascaded adf.userSession.userData.put(getAttribute('OptyId') + cache_name, true) // mark this opportunity as having status just cascaded. } return true  // For StatusCodeSetId def cache_name = '_statuscode_insync_cascade' def insync_ cascade = adf.userSession.userData[getAttribute('OptyId') + cache_name]println("StatusCodeSetId: insync_cascade = " + insync_cascade)insync_cascade = (insync_cascade == null) ? false : insync_ cascade // ensure insync_cascade is either true/false try { if (insync_cascade)</pre> |

| Attribute                           | Sample Groovy Script                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                     | <pre> { cascadeInSyncValueToAllRevenues("StatusCodeSetId", oldValue, newValue) // only cascade if the Status has just been cascaded. } } Finally { adf.userSession.userData.remove(getAttribute("OptyId") + cache_name) } return true </pre>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Win/Loss and ReasonWonLostCodeSetId | <pre> // For Win/Loss Reasondef cache_name = '_winlossreason_insync_cascade'if (oldValue == 'INSTALL_BASE' &amp;&amp; newValue == 'TEST_VO_1') { cascadeInSyncValueToAllRevenues("ReasonWonLostCode", oldValue, newValue) // Mark this opportunity's WinLossReason as having been synchronization cascaded adf.userSession.userData.put(getAttribute('OptyId') + cache_name, true)}return true // For ReasonWonLostCodeSetIddef cache_name = '_winlossreason_insync_ cascade'def insync_cascade = adf.userSession.userData[getAttribute('OptyId') + cache_name]println("ReasonWonLostCodeSetId: insync_cascade = " + insync_cascade)insync_cascade = (insync_cascade == null) ? false : insync_ cascade  // ensure insync_cascade is either true/false { if (insync_cascade) { cascadeInSyncValueToAllRevenues("ReasonWonLostCodeSetId", oldValue, newValue) } }finally { adf.userSession.userData.remove(getAttribute("OptyId") + cache_name) } return true </pre> |
| Primary Partner                     | <pre> cascadeInSyncValueToAllRevenues("PrimaryPartnerId", oldValue, newValue)  return true </pre>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| Primary Competitor                  | <pre> cascadeInSyncValueToAllRevenues("PrimaryCompetitorId", oldValue, newValue)  return true </pre>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

## Sample Groovy Scripts for Opportunity Revenue Attributes

Let's look at sample groovy script code for a subset of opportunity revenue attributes.

| Attribute       | Sample Groovy Script                                                                           |
|-----------------|------------------------------------------------------------------------------------------------|
| Win Probability | <pre> cascadeInSyncValueToAllRevenues("WinProb", oldValue, newValue) return true </pre>        |
| Sales Channel   | <pre> cascadeInSyncValueToAllRevenues("SalesChannelCd", oldValue, newValue) return true </pre> |

| Attribute        | Sample Groovy Script                                                                         |
|------------------|----------------------------------------------------------------------------------------------|
| Include Forecast | <pre>cascadeInSyncValueToAllRevenues("SalesChannelCd", oldValue, newValue) return true</pre> |

#### Related Topics

- [Opportunity and Product Line Attributes Synchronization](#)
- [How can I disable opportunity to revenue line synchronization logic?](#)

## Add Status Categories for Open Revenue

You can specify additional revenue line status categories to include when the application calculates opportunity amount. By default, the application only includes revenue lines in Open status when calculating the opportunity summary amount.

However, you can include, for example, both won and open lines by modifying the lookup type, Open Opportunity Rollup Status Mapping.

Here's how to modify the Open Opportunity Rollup Status Mapping lookup type:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Standard Lookups
2. In the Manage Standard Lookups page, enter **Open Opportunity Rollup Status Mapping** in the **Meaning** field. The lookup type code, which you can search for in the **Lookup Type** field, is **ORA\_MOO\_OPEN\_ROLLUP\_MAPPING**.
3. Add the new lookup code. For example, add a code called **won**.
  - Use **Enabled** to enable or disable a specific lookup code.
  - Update the meaning (display name), start date, end date, or display sequence of any of the predefined values.
  - Add or remove lookup codes, as long as they follow the correct lookup code formatting.

**Note:** The OPEN category can't be modified.

4. Click **Save and Close**.

After you make the changes, the opportunity summary amount calculation will include all revenue lines in OPEN status category, as well as any other status categories you have added and enabled.

#### Related Topics

- [Overview of Lookup Types](#)

## FAQs for Opportunity Products and Revenue

### Frequently Asked Questions (FAQs) for Opportunity Products and Revenue

This section contains the most frequently asked questions (FAQs) when setting up and maintaining opportunity products and revenue. Scroll or search to find answers to common questions.

#### Why can't I see REST API revenue line updates in opportunities?

If a salesperson creates or updates a revenue line in the Opportunities UI and you also create or update the same record using a REST API, then the last record accessed is temporarily held in a storage area as cached data.

This means that the more recent REST API update to the same revenue line record isn't displayed on the Opportunities UI. To get around this issue, close and open the opportunity page after you complete your REST API revenue line record updates.

#### How can I disable opportunity to revenue line synchronization logic?

By default, opportunity cascading logic keeps opportunity summary and revenue lines in synchronization with each other.

If you no longer want opportunity summary and revenue lines to be synchronized, open the Opportunity Synchronization Cascade Enabled profile option (MOO\_ENABLE\_INSYNC\_CASCADE) and set the value to **N**. Note that you can enhance and perform opportunity summary and revenue line synchronization for some attributes using Groovy scripting if you choose to disable the predefined opportunity summary and revenue lines synchronization.

#### What's the maximum number of opportunity revenue lines for one opportunity?

The maximum number of Opportunity revenue lines is 500.

## How can I reduce the number of revenue lines generated for forecasting purposes?

Recurring revenue line items can be aggregated into a single line item with a single close date for forecasted recurring revenue. This means that you can view pipeline forecasts using a single opportunity close date and reduces complexity while maintaining performance.

By setting the profile option, Recurring Revenue Forecast Type (ORA\_MOO\_REV\_RECUR\_FORECAST), you can control whether to:

- Forecast revenue lines based on every single schedule occurrence (default)
- Aggregate multiple recurring revenues lines to a single close date (Opportunity Close Date).

This means that only a single revenue line is required to calculate the total value for pipeline forecasts.

To learn how to change the default value, see the related topic.

### *Related Topics*

- [Modify the Recurring Revenue Forecast Type Profile Option](#)

# 25 Competitors

## Overview of Sales Competitors

Use the sales competitors pages to store information about the sales competition. As a sales administrator, you create the competitor profiles. Salespeople then can associate competitors with opportunities, associate product groups with competitors, and view competitor details.

The key features of managing competitors include the following:

- **Competitor profile:** Store several aspects of competitor companies, such as name, URL, threat level, and industries and geographies where the competitors are doing business.
- **Internal experts:** Associate with competitors people from your company who are considered experts about the associated competitor.
- **Collateral:** Attach relevant competitor documents. After you store them, salespeople can access the competitive collateral to position products or solutions against competitors.
- **Competitors in opportunities:** Associate competitor information with opportunities, both at the opportunity level and at the product-line level. After salespeople associate a competitor with an opportunity, the competitor profile shows opportunities where the competitor is present.
- **Notes:** Create free-form notes about the competitor.
- **Revenue at stake:** The competitor profile displays revenue at stake, which is potential opportunity revenue where the competitor is present.
- **Analytics and reports:** Access several analytics and reports around competitor data, such as win/loss trends. See the sales *Creating and Administering Analytics* guide for more information on reports and analytics.

**Note:** A competitor is an Account with Competitor party usage. Thus, every time a competitor is created or updated, servers scripts run, as defined for the Account object. If you don't want the account triggers to execute during the competitor flow, then adjust the Groovy server scripts in the Account object to not execute in the case of Competitor party usage.

### Related Topics

- [Manage Sales Competitors](#)
- [Set the Close Opportunity Profile Options](#)

## Manage Sales Competitors

As a sales administrator, you create and maintain information on sales competitors. After you set up the initial competitor record, sales teams can add competitors to opportunities and product revenue lines. Downstream analytics help teams see how well they competed.

## Create a Competitor

Here's how you create a competitor:

1. Navigate to **Sales > Competitors**.
2. Click the **Create** icon.
3. In the Create Competitor page, enter or select values. Use the information in this table to guide you:

| Field                                      | Description                                                                                      |
|--------------------------------------------|--------------------------------------------------------------------------------------------------|
| Organization Name                          | Name of the competitor.                                                                          |
| Name Suffix                                | Value appended to the name of the Organization Name for the competitor.                          |
| Chief Executive Name                       | Name of the competitor company's chief executive officer or highest-level employee.              |
| Line of Business                           | Line of business of the competitor company's products.                                           |
| D-U-N-S Number                             | Dun & Bradstreet Corporation unique nine-digit identification number for the competitor company. |
| Organization Size                          | Size of the competitor company.                                                                  |
| Year Established                           | Year the competitor company was first started.                                                   |
| Threat Level                               | Perceived threat level of the competitor in closing deals, such as low, medium, and high.        |
| Year Incorporated                          | Year the competitor company was first incorporated.                                              |
| Stock Symbol                               | Stock symbol for the competitor company in the financial markets.                                |
| Fiscal Year End Month                      | Month that the competitor company closes its fiscal year.                                        |
| Dun & Bradstreet Corporation Credit Rating | Credit rating of the competitor company with Dun & Bradstreet Corporation.                       |
| Privately Owned                            | Indicates the competitor company is privately owned.                                             |
| Minority Owned                             | Indicates that the competitor company is minority owned.                                         |



| Field          | Description                                                 |
|----------------|-------------------------------------------------------------|
| Small Business | Indicates that the competitor company is a small business.  |
| Status         | Status of the competitor record, either active or inactive. |

#### 4. Save your changes.

**Note:** Upon saving, if you get an error that a matching company has been found in the application, then respond to the dialog box by either merging this record with the existing one or creating a new organization in the application.

## Enter SWOT for a Competitor

You can assign strength, weakness, opportunity, and threat (SWOT) levels for competitors. Recording and reviewing SWOT levels helps you understand, plan, and craft an effective competitive strategy when facing a competitive threat on a deal.

Here's how you enter SWOT information for a competitor:

**Tip:** You can edit SWOT values after you save them.

1. Navigate to **Sales > Competitors**.
2. In the list, select the name of the competitor.
3. In the Edit Competitor page, add a new row to the SWOT table by clicking the add icon or selecting **Add Row** from the Actions menu.
4. In the new table row, select or enter the SWOT information:

| Field       | Description                                                     |
|-------------|-----------------------------------------------------------------|
| Type        | Indicates the type of SWOT value, such as a threat or weakness. |
| Description | Used to describe the type of SWOT.                              |
| Comments    | Additional comments for the SWOT value.                         |

#### 5. Save your changes.

## View Competitor Opportunities

After salespeople associate a competitor with an opportunity while editing or closing it, the opportunities are automatically added to the competitor profile. The list of opportunities in a competitor's profile is a consolidated view of past and current opportunities where the competitor is present. The opportunity data provides you with useful insight to plan appropriate sales strategies.

Here's how you view competitor opportunities.

1. Navigate to **Sales > Competitors**.
2. In the list, select the name of the competitor.
3. In the Edit Competitor page, click the **Opportunities** tab. The Opportunities table shows all opportunities where the competitor is present.

## Add Attachments to a Competitor

Attachments let you provide additional details about the competitor.

Here's how to attach files, text, or URLs to a competitor record:

1. Navigate to **Sales > Competitors**.
2. In the list, select the name of the competitor.
3. In the Edit Competitor page, click the **Attachments** tab.
4. In the Attachments table, add a new table row by clicking the add icon or selecting **Add Row** from the Actions menu.
5. In the new table row, select or enter the following values:

| Field            | Description                                                                                                                                                                                                                                                                                             |
|------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Type             | Indicates the type of attachment, either a file, free-form text, or a URL.                                                                                                                                                                                                                              |
| File Name or URL | <ul style="list-style-type: none"><li>○ If you selected File as the type, you can browse to the file on your computer.</li><li>○ If you selected Text as the type, use to enter free-form text.</li><li>○ If you selected URL as the type, use to enter the URL of the competitor's web site.</li></ul> |
| Title            | Title of the attachment.                                                                                                                                                                                                                                                                                |
| Description      | Description of the attachment.                                                                                                                                                                                                                                                                          |

6. Save your changes.

## Associate Internal Experts with a Competitor

Internal experts are people in your company who are experts on a competitor. They can help you work with the competitor to close deals.

Use the following procedure to associate internal experts with a competitor.

1. Navigate to **Sales > Competitors**.
2. In the list, select the name of the competitor.
3. In the Edit Competitor page, click the **Internal Experts** tab.
4. In the Internal Experts table, add a new table row by clicking the add icon or selecting **Add Row** from the Actions menu.
5. In the Search and Select: Internal Expert dialog window, search for and select the person.
6. In the search dialog window, click **Apply** and then **Done**.

7. Save your changes. The table displays the details of the internal expert, such as his e-mail address and phone number.

## Associate Geographies or Industries with a Competitor

You can associate geographical locations, such as a country, with a competitor in order to record additional information about a competitor. The stored geographies are locations where the competitor is present. The available geographical locations are those that are defined in your application. You also can store the industries where the competitor competes with your company. The available industries are those that are defined in your application.

Use the following procedure to associate geographies or industries with a competitor.

1. Navigate to **Sales > Competitors**.
2. In the list, select the name of the competitor.
3. In the Edit Competitor page, click the **Geographies** tab. Or, if entering industries, click the **Industries** tab.
4. In the table, add a new table row by clicking the add icon or selecting **Add Row** from the Actions menu.
5. Search for and select the geographical location or industry.
6. In the search dialog window, click **OK**.
7. Save your changes.

## Add Notes to a Competitor Profile

You can add free-form notes to a competitor profile. Here's how:

1. Navigate to **Sales > Competitors**.
2. In the list, select the name of the competitor.
3. In the Edit Competitor page, in the Notes area, click the create icon.
4. Enter the free-form note and save your changes.

### Related Topics

- [Enable Competitors in Opportunities](#)
- [Overview of Sales Competitors](#)
- [Overview of Sales Competitors](#)

## Enable Competitors in Opportunities

Salespeople can manage competitors within opportunities after you expose some UI elements using Application Composer.

Here are the UI elements you can expose in opportunities to support managing competitors. Note that all of these UI elements are hidden by default.

- Competitors subtab: Enable the Competitors subtab within the Edit Opportunity page.
- Primary Competitor or Competitors field: Enable the Primary Competitor or Competitors fields in the Edit Opportunity page. Note you likely want to enable either the Competitors subtab or the Primary Competitor field, but not both at the same time.
- Product-line-level Competitors field: Add the Competitors column to the Products table within the Edit Opportunity page.

For more information about how salespeople manage competitors, see the related topics.

## Add the Competitors Subtab to the Edit Opportunity Page

Here's how to add the Competitors subtab to the Edit Opportunity page:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**.
3. Under Standard Objects, navigate to **Opportunity > Pages**.
4. In the Opportunity: Pages page, ensure that the **Application Pages** tab is active.
5. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
6. Type a new layout name and click **Save and Edit**. The Details Layout page appears.
7. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon. The Configure Subtabs dialog box appears.
8. Move **Competitors** from the Available Subtabs to the Selected Subtabs window.
9. Click **OK**.
10. Back in the Details Layout page, click **Done**.
11. Be sure that the layout status for your user-defined layout is Active.
12. Validate the change by navigating to the edit opportunity page as a sales user, such as a salesperson, and ensure that you can see the Competitors subtab in the Edit Opportunity page.
13. Publish the sandbox following your company's practices.

## Add Competitor Fields to the Edit Opportunity Page

Here's how to add either the Competitors or Primary Competitor fields to the Edit Opportunity page:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**.
3. Under Standard Objects, navigate to **Opportunity > Pages**.
4. In the Opportunity: Pages page, ensure that the **Application Pages** tab is active.
5. In the Details Page Layouts region, select the **Standard Layout** in the table and then click the **Duplicate** icon. The Duplicate Layout dialog box appears.

Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.

6. Enter a name for the new layout and click **Save and Edit**. The application returns you to the edit page for the new layout.
7. In the Summary region, click the edit icon.
8. In the Details Layout: <Layout>: Edit Summary page, find the **Competitors** field or the **Primary Competitor** field in the Configure Detail Form region. Move the field from the Available Fields window to the Selected Fields window.

**Tip:** You may see duplicate fields in the list. Hover over them to see the hover text. For Primary Competitor, select the one whose hover text reads `PrCmptPartyId`. This way you ensure that the Primary Competitor field is editable and allows salespeople to select different competitors for different product lines. If you don't want users to be able to set different competitors on product lines, then enable the other Competitor field (with the hover text `Party Name1`).

9. Click **Save and Close**.

10. Validate the change by navigating to the edit opportunity page as a sales end user, such as a salesperson, and ensuring that you can see the applicable field in the edit page.
11. Publish the sandbox following your company's practices.

## Add the Competitor Column to the Products Table

Here's how to add the Competitor column to the opportunity Products table.

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**.
3. Under Standard Objects, navigate to **Opportunity > Pages**. The Opportunity: Pages page appears.
4. In the Opportunity: Pages page, ensure that the **Simplified Pages** tab is active.
5. In the Details Page Layouts region, select the **Standard Layout** in the table and then click the **Duplicate** icon. The Duplicate Layout dialog box appears.

Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.

6. Enter a name for the new layout and click **Save and Edit**. The application returns you to the edit page for the new layout.
7. In the Edit Revenue Table region, click the edit icon.
8. In the Details Layout: <Layout>: Edit Revenue Table, find the **Competitor** field in the Configure Summary Table window. Move the field from the Available Fields window to the Selected Fields window.

**Tip:** You may see duplicate fields in the list. Hover over them to see the hover text. For Primary Competitor, select the one whose hover text reads `PrCmptPartyId`. This way you ensure that the Primary Competitor field is editable and allows salespeople to select different competitors for different product lines. If you don't want users to be able to set different competitors on product lines, then enable the other Competitor field (with the hover text `Party Name1`).

9. Click **Save and Close**.
10. Validate the change by navigating to the edit opportunity page as a sales end user, such as a salesperson, and ensuring that you can see the Competitor field in the Products table.
11. Publish the sandbox following your company's practices.

### Related Topics

- [Overview of Sales Competitors](#)
- [Associate Competitors with Opportunities](#)

## Enable Competitors in Leads

Salespeople can manage competitors within leads after you expose some UI elements using Application Composer.

Here are the UI elements you can expose in leads to support managing competitors. Note that all of these UI elements are hidden by default.

- Competitors subtab: Enable the Competitors subtab within the Edit Lead page.
- Primary Competitor field: Enable the Primary Competitor field in the Edit Lead page. Note you likely want to enable either the Competitors subtab or the Primary Competitor field, but not both at the same time.

For more information about how salespeople manage competitors, see the related topics.

## Add the Competitors Subtab to the Edit Lead Page

Here's how to add the Competitors subtab to the Edit Lead page:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**.
3. Under Standard Objects, navigate to **Sales Lead > Pages**.
4. In the Sales Lead: Pages page, ensure that the **Application Pages** tab is active.
5. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
6. Type a new layout name and click **Save and Edit**. The Details Layout page appears.
7. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon. The Configure Subtabs dialog box appears.
8. Move **Competitors** from the Available Subtabs to the Selected Subtabs window.
9. Click **OK**.
10. Back in the Details Layout page, click **Done**.
11. Be sure that the layout status for your user-defined layout is Active.
12. Validate the change by navigating to the edit opportunity page as a sales user, such as a salesperson, and ensure that you can see the Competitors subtab in the Edit Lead page.
13. Publish the sandbox following your company's practices.

## Add Competitor Fields to the Edit Lead Page

Here's how to add the Primary Competitor field to the Edit Lead page:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**.
3. Under Standard Objects, navigate to **Sales Lead > Pages**.
4. In the Sales Lead: Pages page, ensure that the **Application Pages** tab is active.
5. In the Details Page Layouts region, select the **Standard Layout** in the table and then click the **Duplicate** icon. The Duplicate Layout dialog box appears.

Note that you may be using a different layout than the default one. If this is the case, then select the appropriate layout.

6. Enter a name for the new layout and click **Save and Edit**. The application returns you to the edit page for the new layout.
7. In the Summary region, click the edit icon.
8. In the Details Layout: <Layout>: Edit Summary page, find the **Primary Competitor** field in the Configure Detail Form region. Move the field from the Available Fields window to the Selected Fields window.
9. Click **Save and Close**.
10. Validate the change by navigating to the edit lead page as a sales end user, such as a salesperson, and ensuring that you can see the applicable field in the edit page.
11. Publish the sandbox following your company's practices.

### Related Topics

- [Overview of Sales Competitors](#)
- [Associate Competitors with Opportunities](#)

# 26 Business Plans

## Overview of Business Plans

Business plans are a set of goals that an account or partner wants to accomplish. Business plans allow both brand owners and partners a way to show their commitment to the partnership.

Let's take a look at the business plan components:

| Component            | Description                                                                                                                |
|----------------------|----------------------------------------------------------------------------------------------------------------------------|
| Business Plan Header | The header area contains key information about a business plan, including its duration and partner or account information. |
| SWOT                 | This is an acronym for the strength, weaknesses, opportunities, and threats of a business plan.                            |
| Team                 | These are sales resources who have access to business plans.                                                               |
| Activities           | Users can associate tasks, appointments, and call logs with business plans.                                                |
| Notes                | Users can associate notes with business plans.                                                                             |

A business plan attribute class is used to determine which object a business plan is created for. Two business plan classes, Partner and Account, are supplied, and you can add others. Use the Manage Business Plan Classes task to manage business plan classes.

Partner business plans consist of partner goals and are primarily used by channel account managers and their counterparts partner sales managers. The plans include specific objectives that a partner can follow to meet business plan goals. Partner business plans provide a means of collaboration between brand owners and their partners in defining strategic goals.

Account business plans consist of goals for sales representatives and sales managers for specific accounts that they manage.

If you have customized roles for your business plan users, be sure to add the following data security policy using the Security Console's Database Resource page – otherwise, your users won't be able to save business plan notes:

- Database Resource: Note
- Data Set: Select by instance set
- Condition Name: Notes Default Instance Set
- Parameter 1: SALES\_BUSINESS\_PLAN
- Actions: Read, Update, Delete, Manage Sales Business Plan Note

For more information, see [Manage Database Resources](#) in the Configure and Troubleshoot Data Security chapter in the [Securing Sales and Fusion Service](#) guide.

## Enable Account Business Plans

In the ready-to-use application, the default class of business plans is partner business plans. If your requirement is to only manage partner business plans, then you don't need to make any changes related to the business plan class.

If you manage only account business plans, then you must make only one change related to the business plan Class using Application Composer. Enable the Class field in the UI and in the display sequence field, ensure Account has the smallest sequence number.

If you manage both partner and account business plans, then ensure that both partner and account classes are enabled.

1. Ensure you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.
3. In the Objects navigation tree, expand **Standard Objects** and then expand **Business Plan**.
4. Click the **Pages** node.
5. Ensure that the **Application Pages** tab is selected.
6. Duplicate the Standard Layout for the Landing Page.
7. Edit the new layout by adding the Account and Class fields on the Landing Page Layout.
8. In the display sequence field, ensure Account has the smallest sequence number.
9. Repeat for other pages where you want the field to appear.
10. Test the changes.
11. Publish the sandbox according to your company's business practices.

### Related Topics

- [Overview of Business Plans](#)
- [Overview of Managing Partner Business Plans](#)

## Enable Objectives on the Business Plans Overview Tab

You can enable salespeople to view and drill into objectives on the overview tab of business plans. Use the profile option ZCA\_SHOW\_OBJECTIVES\_IN\_SUBTAB to specify where objectives are displayed. The default value depends on the following:

- For a new installation, the default value is Y. If the value is set to Y, then objectives are displayed as a subtab on the Edit Business Plan: Summary page.
- For an existing customer without objectives in the application, the default value is Y.
- If the value is set to N, then the objectives are displayed on the Edit Business Plan: Summary page.

To enable objectives on the overview tab:

1. In the Setup and Maintenance area, go to the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. Enter ZCA\_SHOW\_OBJECTIVES\_IN\_SUBTAB in the Profile Option Code field.



3. Click **Search**.
4. In the Profile Option: Profile Values region, do one of the following:
  - To display objectives on the overview tab, set the Profile Value to No.
  - To display objectives in a separate side tab, set the Profile Value to Yes.
5. Click **Save and Close**.

## Considerations When Managing Business Plan Classes

As a sales administrator you can manage business plans and their classes.

The following table shows business plan features and what you can do with them:

| Business Plan Feature                                 | What You Can Do                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| User-defined classes                                  | <ul style="list-style-type: none"><li>• Rename the supplied classes, add classes, and mark classes as disabled.</li><li>• Use the Manage Business Plan Classes task to rename the lookup type values. The account and partner classes are supplied in the ready to use application.</li><li>• In addition to those used for partners or accounts, you can add business plan classes that define more business plans, such as territories business plans.</li></ul> |
| Supplied business plan classes                        | <ul style="list-style-type: none"><li>• Access the following supplied business plan classes:<ul style="list-style-type: none"><li>◦ Partner</li><li>◦ Account</li></ul></li><li>• Enable and disable any of the supplied classes using the Manage Business Plan Classes task.</li></ul>                                                                                                                                                                            |
| Default business plan class                           | The default business plan class is determined by the business plan class settings. A class represented by an enabled look up code with the lowest display sequence is selected as the default class of a new business plan. You can view and manage business plan classes using in Manage Business Plan Classes task. You can import business plans of any class that's specified and enabled in Manage Business Plan Classes task.                                |
| Conditionally required partner or account information | Partner information is required only if the class of the business plan is Partner. Similarly, account information is required only if the class of the business plan is Account.                                                                                                                                                                                                                                                                                   |
| Owner list of values                                  | The Owner list of values depends on the class of the business plan. For the Partner class, the list of values shows selected partner team members as the candidates for the business plan owner. For the Accounts class, the owner list of values shows selected account team members as the candidates for the business plan owner.                                                                                                                               |

## View Business Plan Lookups

You can view lookups that are supplied in a business plan and also add values to them. Lookups corresponding to business plan classes, business plan types, business plan statuses, and business plan team member functions have dedicated tasks namely:

- Manage Business Plan Classes
- Manage Business Plan Types
- Manage Business Plan Statuses
- Manage Business Plan Team Member Functions

Other lookups are covered by the Manage Business Plan Configurable Lookups task. To view business plan lookups:

1. In the Setup and Maintenance area, go to the following:
  - Offering: Sales
  - Functional Area: Customer Center
  - Task: Manage Business Plan Configurable Lookups
2. View the remaining lookup types.
3. Click any lookup type to see the lookup codes.

# 27 Assets

## Overview of Setting Up Sales Assets

Assets are high-net-worth products owned by an organization. After you enable assets in the sales applications, salespeople can create and manage assets associated with their customers and associate assets with activities like appointments and tasks.

Here are some of the ways sales users access assets:

- Click **Sales > Assets** on the springboard to use a full set of create, edit, and manage assets capabilities
- Manage assets within the context of accounts
- Associate assets with activities, such as tasks and appointments
- Create an organization-level view of calendars associated with assets
- Associate assets with opportunities and leads

## Setup Options for Assets

This table describes the setup configurations available for Assets:

| Decision Point                                                                                                                                                          | Description                                                                                                                                                                                                                                                      | Where to Find More Information                                                                                                                                                                                                 |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Determine whether to use Oracle Supply Chain Management (Oracle SCM) Installed Base Assets or the default Assets functionality that comes supplied with the application | Which option you choose depends on your business needs. The default option lets your users do the tasks listed earlier in this topic. If you enable Oracle SCM Installed Base Assets, your users have additional capabilities for tracking assets in Activities. | See the <a href="#">Enable Installed Base Assets</a> topic in this chapter                                                                                                                                                     |
| Expose the Assets icon in the springboard (default setup)                                                                                                               | The Assets icon isn't available by default from the Sales springboard. You can enable it to give salespeople access to the Assets pages.                                                                                                                         | See: <ul style="list-style-type: none"><li>• The section in this topic, Expose the Assets Icon</li><li>• The topic, <a href="#">Configure Navigation</a></li></ul>                                                             |
| Enable the Assets list of values in Activities pages (default setup)                                                                                                    | The Assets list of values isn't available by default in the Activities pages. You can expose the Assets list of values in activities, including in appointments, call reports, and tasks, to allow salespeople to associate an asset with activities.            | See: <ul style="list-style-type: none"><li>• The topic, <a href="#">Enable the Assets List of Values</a> in this chapter</li><li>• The topic, <a href="#">Extend Application Pages for Activities</a>, in this guide</li></ul> |
| Enable the Leads and Opportunities subtabs in the Assets pages.                                                                                                         | The Leads and Opportunities subtabs aren't available by default in the Assets pages. You can expose the subtabs in the Assets pages to allow salespeople to associate leads and opportunities with assets.                                                       | See these topics: <ul style="list-style-type: none"><li>• <a href="#">Enable the Leads Subtab in Assets</a></li><li>• <a href="#">Enable the Opportunities Subtab in Assets</a></li></ul>                                      |

## Expose the Assets Icon

The Assets icon isn't available by default. You enable it using these steps:

1. Ensure you're working in an active sandbox.
2. Click **Navigator** > **Structure**.
3. In the Structure page, ensure that the **Navigation Configuration** tab is selected.
4. Expand the **Sales** node and click the **Assets** link.
5. In the Edit Page Entry: Assets page:
  - a. In the **Navigator** field, select Yes.
  - b. In the **Springboard** field, select Yes.
  - c. Click **Save and Close**.
6. Verify the changes by signing in as a user with access to the Sales pages, such as a sales representative. Ensure you can see the Assets icon on the Sales home page and springboard.
7. Publish the sandbox.

For more information about modifying the UI and using sandboxes see the [Configuring Applications Using Application Composer](#) guide.

## Sales Catalog Integration

The Assets application is automatically integrated with the sales catalog and with sales products. In the assets pages, lists of values appear for products and product groups that are included in the catalog. For more information, see the Sales Catalogs and Products chapters in this guide. Also see the sales user topics on using assets in the [Using Sales](#) guide.

## Import and Web Service Integration

You can import assets into the application. You can also use web services to create an asset. For more information, see the [Understanding Import and Export Management for CX Sales and Fusion Service](#) guide.

## Overview of Asset Security

By default, the standard Sales job roles, such as Sales Representative and Sales Manager, have access to the Assets UI. If you want to configure Assets security, use the information in this topic.

If duty roles aren't configured, then users need one of these duties to view, create, edit, delete, and export assets:

- Sales Party Review Duty (grants view access only)
- Sales Party Management Duty
- Marketing Sales Party Management Duty

The duty roles can be configured by adding or removing these privileges:

- View Assets
- Create Asset
- Edit Asset

- Delete Asset

For more information, see the *Securing CX Sales and Fusion Service* guide.

## Setup Tasks

### Configure Assets Saved Search

You can configure the number of days, in the past, from the current date, for which the application retrieves records for the All My Customer's Assets saved search.

#### Set the Profile Option for the Saved Search

The profile option, Default Asset Purchase Date (ZCM\_ASSET\_DEFAULT\_PURCHASE\_DATE), controls the behavior of the saved search based on the asset's purchase date. To set the profile option:

1. In the Setup and Maintenance area, go to:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. Search for the profile option using either the code or the display name.
3. Set the profile value as required.
4. Click **Save and Close**.

#### How the Profile Option Is Calculated

If you select 60 in the profile option, then the application retrieves all those assets whose purchase date is within 60 days of the current date.

Similarly, you can select 90 or 180 days, and the application retrieves assets whose purchase date is within the selected days from the current date.

**Note:** You can update or remove the purchase date from the Advanced Search option.

### Enable Installed Base Assets

Let salespeople manage activities like tasks and appointments more efficiently by including Installed Base Assets in Activities. You can also enable the Installed Base Assets tab in the Accounts pages.

For example, salespeople can tie the maintenance of a copier to a task, or in the Automobile verticals application, tie a car's test drive to an appointment.

You can add Installed Base Asset fields to the Activity and Account page layouts in Application Composer. From here, installed base asset data can then be passed to downstream processes such as Field Service or Service Logistics. Installed Base Assets is part of Oracle Supply Chain Management (SCM).

You can show these attributes or fields on the Activity create and edit pages:

- Installed Base Asset
- Installed Base Asset Number
- Installed Base Asset Serial Number

## Opt In to Installed Base Assets

Ensure first that you have opted in to Installed Base Assets:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Change Feature Opt in link
2. Click the **Features** icon for Sales in the first row.
3. Select Enable for **Manage Assets Using Common Asset Model**.
4. Click **Done**.
5. Click Done on the Opt In page.

**Note:** This is a global setting where you choose whether to use Oracle SCM Installed Base Assets or the default CRM Asset object. You can't use both asset objects in the sales application, so carefully consider the impact if you have requirements to support asset management.

## Enable the Activities Subtab in Assets

You can expose the Activities subtab in the Edit Asset page to let salespeople associate activities with assets. You must expose asset fields in the activities pages to display the asset information for the activity.

By default, the Activities subtab doesn't appear in the Edit Asset page.

Here's how to show the Activities subtab in the Edit Asset page:

1. Ensure you're working in an active sandbox.
2. Navigate to **Application Composer**, in the Configuration category.
3. In the navigation tree, expand **Standard Objects**, expand **Asset**, and click **Pages**.
4. Ensure that the **Application Pages** tab is selected.
5. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the duplicate icon.
6. Enter a new layout name and click **Save and Edit**.  
The Details Layout page appears.
7. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.  
The Configure Subtabs dialog box appears.
8. Move **Activities** from the Available Subtabs window to the Selected Subtabs window.
9. Click **OK**.
10. From the Details Layout page, click **Done**.
11. Make sure that the layout status for your layout is set to Active.
12. Test the changes as follows:

- Navigate to **Sales > Assets** as a user with access to the assets pages, for example, as a salesperson.
  - Edit an asset and ensure you can see the Activities subtab in the Edit Asset page.
13. Publish the sandbox according to your company's business practices.

## Enable the Assets List of Values in Activities

You can expose the Assets list in the Activities pages for salespeople to associate an asset with appointments, tasks, and call reports. By default, the Assets list doesn't appear in the Activities pages.

To enable the Assets list in the Activities pages:

1. Ensure you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.
3. Expand **Standard Objects** and then expand **Activity**.
4. Click the **Pages** node.
5. Ensure that the **Application Pages** tab is selected.
6. Find the section you want to add the Assets list to. For example, to add the Assets list to the appointment details page, use the Appointment Details section in the Details Page Layouts region.
7. Within that section, duplicate the standard layout by highlighting the standard layout and clicking the duplicate icon.
8. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.
9. Click the edit icon to edit the Summary region.  
The Details Layout: Edit Summary page appears.
10. In the Configure Detail Form section, move the **Asset** field from the **Available Fields** box to the **Selected Fields** box.
11. Click **Save and Close**.
12. On the Details Layout page, click **Done**.
13. Ensure that the layout status for your new layout is **Active**.
14. Test the changes: Navigate to **Sales > Activities** as a user with access to the Activities pages, for example, as a salesperson. Edit an appointment and ensure you can see the Asset list in the Edit Appointment page.
15. Publish the sandbox according to your company's business practices.

## Enable the Assets Subtab in Accounts

You can expose the Assets subtab list in the Accounts pages to give salespeople the ability to associate an asset with an account. You must expose asset fields on the Accounts pages to display the asset information for the account.

By default, the Assets subtab doesn't appear in the Accounts pages.

**Note:** You also can expose a subtab for Installed Base Assets (part of Oracle SCM) in accounts. This is a separate configuration, not part of CRM Assets. Therefore, Installed Base Assets won't show in the Assets subtab. Instead, you need to expose the Installed Base Assets subtab using Application Composer.

Here's how to expose the Assets subtab list in the Edit Account page:

1. Activate a sandbox.

2. Navigate to **Application Composer**, in the Configuration category.
3. Select **Sales**.
4. In the navigation tree, expand **Standard Objects**, expand **Account**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**. The Details Layout page appears.
8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.  
  
The Configure Subtabs dialog box appears.
9. Move **Assets** from the Available Subtabs to the Selected Subtabs window.
10. Click **OK**.
11. Back in the Details Layout page, click **Done**.
12. Be sure that the layout status for your user-defined layout is Active.
13. Test the changes: Navigate to **Sales > Accounts** as a user with access to the assets pages, for example, as a salesperson. Edit an account and ensure you can see the Assets subtab in the Edit Account page.
14. Publish the sandbox.

For more information, see the [Configuring Applications Using Application Composer](#) guide.

#### *Related Topics*

- [Overview of Setting Up Sales Assets](#)
- [Enable the Opportunities Subtab in Assets](#)
- [Overview of Sales Assets](#)
- [Overview of Sandboxes](#)

## Enable the Leads Subtab in Assets

You can expose the Leads subtab list in the Edit Assets page to give salespeople the ability to associate an asset with a lead. You must expose asset fields on the Lead pages to display the asset information for the lead.

By default, the Leads subtab doesn't appear in the Assets pages.

Here's how to expose the Leads subtab list in the Edit Assets page.

1. Activate a sandbox.
2. Navigate to **Application Composer**, in the Configuration category.
3. Select **Sales**.
4. In the navigation tree, expand **Standard Objects**, expand **Asset**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
  
The Details Layout page appears.
8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.  
  
The Configure Subtabs dialog box appears.
9. Move **Leads** from the Available Subtabs to the Selected Subtabs window.



10. Click **OK**.
11. Back in the Details Layout page, click **Done**.
12. Be sure that the layout status for your user-defined layout is Active.
13. Test the changes: Navigate to **Sales > Assets** as a user with access to the assets pages, for example, as a salesperson. Edit an asset and ensure you can see the Leads subtab in the Edit Asset page.
14. Publish the sandbox.

For more information, see the *Configuring Applications Using Application Composer* guide.

#### Related Topics

- [Overview of Setting Up Sales Assets](#)
- [Enable the Opportunities Subtab in Assets](#)
- [Overview of Sales Assets](#)
- [Overview of Sandboxes](#)

## Enable the Opportunities Subtab in Assets

You can expose the Opportunities subtab in the Edit Asset page to give salespeople the ability to associate opportunities with assets. You must expose asset fields in the opportunity pages to display the asset information for the opportunity.

By default, the Opportunities subtab doesn't appear in the Edit Assets page.

Here's how to enable the Opportunities subtab in the Edit Asset page.

1. Activate a sandbox.
2. Navigate to **Application Composer**, in the Configuration category.
3. Select **Sales**.
4. In the navigation tree, expand **Standard Objects**, expand **Asset**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.
8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.  
The Configure Subtabs dialog box appears.
9. Move Opportunities from the Available Subtabs window to the Selected Subtabs window.
10. Click **OK**.
11. From the Details Layout page, click **Done**.
12. Make sure that the layout status for your layout is set to Active.
13. Test the changes as follows:
  - Navigate to **Sales > Assets** as a user with access to the assets pages, for example, as a salesperson.
  - Edit an asset and ensure you can see the Opportunities subtab in the Edit Asset page.
14. Publish the sandbox.

For more information, see the related topics and the *Configuring Applications Using Application Composer* guide.

*Related Topics*

- [Overview of Setting Up Sales Assets](#)
- [Enable the Leads Subtab in Assets](#)
- [Overview of Sales Assets](#)
- [Overview of Sandboxes](#)

# 28 Promotions

## Overview of Sales Promotions

Salespeople can create and manage promotions that offer discounts based on specified conditions. After they're created, promotions can be used in other applications that want to leverage promotions in their pages.

**Note:** You don't need to do anything to set up promotions. However, to leverage promotions, you must modify the applications where you're going to use them.

### Promotions Tasks

As the sales administrator, you can:

- Create promotions
- View and edit promotion details and attributes
- View a list of promotions
- Search for promotions
- Copy promotions
- Import promotions and create and update promotions using Oracle import

#### *Related Topics*

- [Work with Sales Promotions](#)

## Work with Sales Promotions

Use the procedures in this topic as you create and maintain sales promotions.

This topic covers:

- Viewing a list of sales promotions: This task includes searching and filtering.
- Creating promotions: This task includes entering promotions basic information.
- Editing promotions: This task includes modifying the details of promotions.
- Copying promotions: This task includes copying a promotion so that you can repurpose it.
- Deleting promotions.

**Note:** You don't need to do anything to set up promotions. However, to leverage promotions, you must modify the applications where you're going to use them.

## View the Promotions List

To view a list of promotions, navigate to **Sales > Promotions**.

In the landing (or list) page, you can:

- Search for promotions.
- Filter the view between promotion statuses, such as active or inactive.

## Create and Edit Promotions

Creating promotions includes entering basic information, such as name and status, and saving the promotion for the first time. In edit mode you enter more details, such as the type of discount and the discount value.

Here's how to create and edit a new sales promotion.

1. Navigate to **Sales > Promotions**.
2. Click the **Create Promotion** button.
3. In the Create Promotion page, enter a unique name in the **Name** field.
4. Optionally, enter a description and start and end dates.
5. Click **Save and Continue** to save the promotion and begin entering additional details. The page refreshes and becomes the Edit Promotion page.  
**Note:** At this point you can copy the promotion or delete it.
6. In the **Status** field, select the status of the promotion. Inactive promotions aren't available in consuming applications.
7. In the **Type** field, select the adjustment type. The type can be either:
  - Fixed amount: Select Line Discount Amount.
  - Percentage: Select Line Discount Percent.
8. In the **Apply To** field, select whether the discount should apply to:
  - List Price: List price is the advertised, published or sticker price on a product being marketed to a business or consumer buyer.
  - Net Price: Net price is the actual price paid once any discounts are taken off the list price.
9. In the **Value** field, enter an amount. The amount is either the percentage of the discount or a fixed amount, depending on which type of adjustment you selected in the **Type** field.

## Copy Promotions

To repurpose existing promotions, you can copy them any time after saving them.

Here's how:

1. Navigate to **Sales > Promotions**.
2. Select the name of a promotion in the list.
3. In the Edit Promotions page, from the Actions menu, select **Copy Promotion**.
4. In the Copy Promotion page, in the **Name** field, enter a new, unique name.
5. Click the **Save and Continue** button.  
The Edit Promotion page appears, where you can edit the details of the promotion. See the Create and Edit Promotions section in this topic for more information.

## Delete Promotions

To delete a promotion:

1. Navigate to **Sales > Promotions**.
2. Select the name of a promotion in the list.
3. In the Edit Promotion page, from the Actions menu, select **Delete Promotion**.
4. Click **Yes** in the warning message window.

### *Related Topics*

- [Overview of Sales Promotions](#)



# 29 Assessments

## Overview of Assessments

Assessments enable you to evaluate the condition of a business object, such as an opportunity or lead. Administrators define assessment templates that consist of questions with scored responses and then make the assessments available in the application.

During the assessment process, you're presented with assessment questions. Responses to the questions provide you with immediate scoring and recommendations or follow-up business processes.

Assessments can consist of the following components:

- Questions
- Question ratings
- Responses, including free-form responses
- Scoring of the assessment
- Tasks to be performed based on feedback score

## Setup Tasks

### How to Create Assessment Templates

You can use assessment templates to analyze the condition of your business objects, such as opportunities or leads. This topic explains the various tasks involved in creating an assessment template.

This table lists the business objects that support assessment templates, along with the setup task that you must use to create templates for each object.

| Business Object | Task Name                                  |
|-----------------|--------------------------------------------|
| Accounts        | Manage Customer Center Assessment Template |
| Opportunities   | Manage Opportunity Assessment Templates    |
| Leads           | Manage Sales Lead Assessment Template      |

The steps to create assessment templates is the same for all objects. Here's how to create an assessment template for the Opportunity business object.

1. In the Setup and Maintenance work area, go to the following:

- Offering: Sales
- Functional Area: Opportunities
- Task: Manage Opportunity Assessment Templates

2. Search for and select the assessment template setup task for the applicable business object.

For example, search for and select the Manage Opportunity Assessment Templates task. The Manage Opportunity Assessment Templates page appears.

## Assessment Template Basic Details

To create an assessment template for a business object, start by entering the basic details:

1. In the relevant business object's assessment template page, click the **Create** icon.
2. In the assessment template details page, enter the details shown here:

| Field                | Description                                                                                                                                                                                                                                                                                                                                                                | Example                                                                                 |
|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| <b>Name</b>          | <p>Enter a name for the template.</p> <p><b>Note:</b> After you deploy a template, you can't change its name or edit many other aspects. If you need to make changes, make changes in a copy, and then deploy the copy.</p>                                                                                                                                                | Discount Eligibility                                                                    |
| <b>Template Type</b> | <p>Select the type of template that you want to create.</p> <p>The template type options vary depending on the object that you're creating the template for. For example, if you're creating an assessment template for opportunities, only the template types meant for opportunities, such as Opportunity, Opportunity Product, and Opportunity Contact are visible.</p> | Opportunity                                                                             |
| <b>Template Set</b>  | <p>Select the template set.</p> <p>A template set is a reference data set that contains one or more business units (BUs). Selecting the template set ensures that the template is available for use only to those BUs that are part of this template set.</p>                                                                                                              | <p>Common Set</p> <p>Selecting Common Set makes the template available for all BUs.</p> |
| <b>Description</b>   | Optionally, provide a description.                                                                                                                                                                                                                                                                                                                                         | Discount eligibility assessment.                                                        |



| Field | Description | Example |
|-------|-------------|---------|
|       |             |         |

3. Add attachments if there is any information that might help the salesperson. For example, add a .pdf file that contains information that might be helpful.
4. Click **Next**.

The Configure Ratings page appears.

## Configuring Ratings

Ratings group question responses in a template into different categories. There are three predefined ratings: Poor, Average, and Excellent. You can add your own ratings or modify the predefined ratings.

To add a rating:

1. Click the **Add Row** icon and enter **Text** and **Description**.
2. Click **Next**.

The Enter Questions and Responses page appears.

To modify a rating, just replace the text in the **Text** field.

## Enter Questions and Responses

In this step, you create questions and responses, and also set a rating for each of the question responses.

The score range for ratings is derived automatically in the next step of the assessment template creation process based on the rating you set here.

To create questions and responses:

1. Click the **Create** icon and select **Create Question Group**.  
**Note:** All questions must be part of a question group.
2. In the Create Question Group dialog box, enter **Name** and **Description**. For example, enter **Deal** and **Question group for deals** respectively.
3. Click **Save and Close**.
4. Click the **Create** icon and select **Create Question**.
5. In the Create Question dialog box, enter details as shown in the following table:

| Field                 | Description                                                     | Example                                 |
|-----------------------|-----------------------------------------------------------------|-----------------------------------------|
| <b>Question</b>       | Enter a question that you want in the assessment template.      | How soon will the implementation start? |
| <b>Question Group</b> | Select the question group to which this question should belong. | Opportunity Question Group              |
| <b>Weight</b>         | Enter the weight for this question.                             | 50                                      |

| Field       | Description                                                                                                                                                                                                                                                                                                                                                                                                                      | Example                                                                                           |
|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------|
|             | <p>Weight determines the relative importance of a question within the assessment template. The higher the weight for a question, the more important this question is compared to the other questions in the template.</p> <p>The sum of weights for all questions in a template must be 100.</p> <p><b>Note:</b><br/>You can also enter the weight in a later step, or even edit what you have entered here in a later step.</p> | This indicates that this question has 50% importance compared to other questions in the template. |
| Description | Optionally, provide a description.                                                                                                                                                                                                                                                                                                                                                                                               | Description for the opportunity question group.                                                   |

6. Click **Save and Close**.

**Note:** In the **Question Details** section, select the **Include Free-Form Response Option** check box only if you have a question that supports a free form response. Selecting this option adds a default response in the **Possible Responses** section. Free-form responses are recorded as comments in consuming applications, and they're not scored.

7. In the **Possible Responses** section, click the **Add** icon.

8. Enter details as shown in the following table:

| Field            | Description                                                                                                                                                                                                                                                                                                                                                                        |
|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Response         | Enter a response that the user can select for this question.                                                                                                                                                                                                                                                                                                                       |
| Score            | <p>Add the score that you want to allocate to each of these responses.</p> <p><b>Note:</b><br/>Score is displayed as Weight multiplied (*) by the (Normalized Score percent (%)) based on the response selected. For example, the selected response's normalized score is 35 and the question's weight is 20. So the assessment's score will be <math>20 * (35 \%) = 7</math>.</p> |
| Normalized Score | <p>This appears automatically once you fill in the score.</p> <p>The response that has the highest score gets a 100%.</p>                                                                                                                                                                                                                                                          |

| Field       | Description                                                         |
|-------------|---------------------------------------------------------------------|
|             |                                                                     |
| Rating      | Define the rating that you want to assign to each of the responses. |
| Description | Optionally, provide a description.                                  |

Here's an example of the possible responses:

| Response       | Score | Normalized Score | Rating    |
|----------------|-------|------------------|-----------|
| 0 to 3 months  | 5     | 25               | Poor      |
| 4 to 6 months  | 10    | 50               | Average   |
| 7 to 12 months | 15    | 75               | Good      |
| > 1 year       | 20    | 100              | Excellent |

9. Similarly, create all the questions that you want to include in this template along with the possible responses.
10. Click **Next**.

The Edit Question Weights page appears.

## Edit Question Weights

You can use this page to verify the weights that you entered for all the questions in the previous step. Check whether the weight total aggregates to 100. If not, you must update the weights to reach a total of 100. You can also use this page to edit the weights of questions.

Click **Next**. The Configure Score Range Attributes page appears.

## Configure Score Range Attributes

Depending on the scoring to response mapping in the questions and responses that you entered earlier, score ranges for ratings are automatically derived here. You can select the **Override score ranges** check box to edit the automatically derived score ranges and set different start and end scores for the ratings. You can modify the colors shown in the various score ranges.

Based on the assessment score, feedback can be displayed for the assessment in the consuming application, such as in opportunities. To provide feedback, enter the feedback in the **Feedback** field. For example, if the score is 95 and it maps to **Excellent** as rating, you could enter feedback such as **Qualified for discount pending manager approval**.

Click **Save and Close**.

You have now completed creating your assessment template.

## Additional Implementation Steps

Once your assessment template is ready, you might have to perform some additional implementation steps before the template is available for the user.

For opportunities, you must attach the template to a sales stage within a sales method:

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Sales Methods and Sales Stages
2. In the Manage Sales Methods page, create or edit a sales method, and then add or edit sales stages.
3. In the Create or Edit Sales Stage page, navigate to the **Assessment Templates** region.
4. Click **Add**.
5. Search for the template you want to associate with the sales stage and add the template.

When an opportunity is in the relevant sales stage, the sales representative can use the associated assessment templates from the **Assessments** subtab.

### Related Topics

- [Overview of Assessments](#)
- [Considerations for Setting Up Assessment Templates](#)
- [Guidelines for Setting Up Opportunity Assessments](#)
- [Create and Edit Sales Methods and Stages](#)
- [How do I update existing setup data?](#)

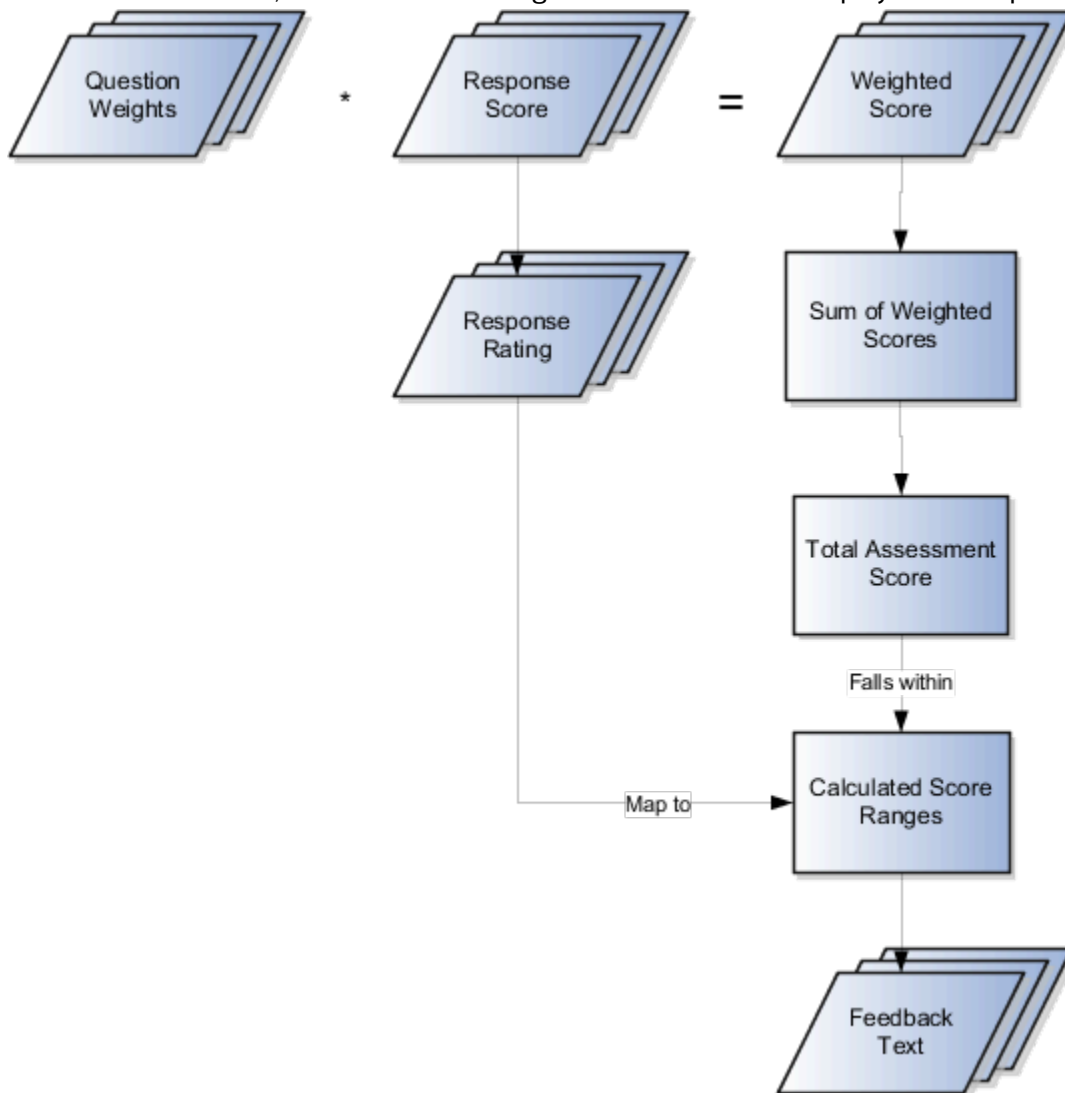
## Implementation Concepts for Assessments

### Assessment Template Components

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

The assessment multiplies a question weight by a response score to achieve a weighted score for an assessment template response. It adds the weighted scores for all responses together to determine the total assessment score. This score falls within a score range calculated in advance, that's also associated with a response rating and feedback text. Therefore, the score range within which the total

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



## Question Weight

The question weight is the relative importance of a question within an assessment template. The template expresses it as a percentage. All of the question weights within a template must total to exactly 100. When you use an assessment template, the template multiplies a question's weight by the score of the question response to produce a weighted score for that response.

## Response Score

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

When you use an assessment template, the template multiplies the normalized score of the question response by the question's weight to produce a weighted score for that response.

## Response Rating

A response rating is:

- The rating assigned to a possible response to a question in the template.
- A textual qualification, such as Excellent or Poor that provides a metric other than a numeric score for qualifying the outcome of an assessment.

A response rating relates directly to a response score, and this relationship should ensure that a higher score translates to a higher rating.

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

When you use an assessment template, the template adds the weighted scores from all responses to determine the total assessment score. That score falls somewhere within the calculated score ranges. These ranges then determine which rating the template assigns to the assessment and what feedback text to display. The maximum total assessment score is 100.

### *Related Topics*

- [How Assessment Template Score Range is Calculated](#)

## Considerations for Setting Up Assessment Templates

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

- Ratings
- Questions, question groups, and question weights
- Responses and scores
- Associated task templates

## Ratings

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

## Questions, Question Groups, and Question Weights

Questions are the main components of an assessment template. They're written to help in systematically determining the health of a business object, and are grouped into logical collections called Question Groups. Each question in the template is assigned a question weight. Question weight is expressed as a percentage, which is the relative importance

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

When setting up questions, question groups, and question weights, you must carefully analyze which factors determine the health of a particular business object (like a lead or an opportunity) in your organization. Use those factors to create your question groups; and then write three to five questions per group that are weighted according to your analysis. There's no limit to the number of questions that can be in a question group, but each question group must have at least one question.

## Responses and Scores

Responses are attached to questions in the template. Each question should have at least two responses, unless it's a free-form only question. More than one response can be tied to the same rating. However, between all of its responses, each question should accommodate at least two ratings, unless it's a free-form only question. For example, if your ratings are Excellent, Average, or Poor, for each question you can include two responses that correspond to at least one of those ratings, such as average. There must be enough responses to cover at least two of the ratings, such as Excellent and Average. You assign a score to each response for a question, and the application normalizes the score based on a standard scoring scale.

When an assessment template is used to perform an assessment, a question's weight is multiplied by the normalized score of the response given for the question to produce a weighted score for that response. When adding responses to questions, ensure that the scores and ratings you assign to each response correlate. In other words, the higher the score you assign to the response, the higher the rating should be so that you have a strong quantitative relationship between the two. Also note that you can allow free-form responses for one or more questions in the template, but free-form responses are never scored.

## Associated Task Templates

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

### *Related Topics*

- [How Assessment Template Score Range is Calculated](#)
- [Assessment Template Components](#)
- [Assessment Template Status Codes](#)
- [How to Create Assessment Templates](#)

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

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

A free-form response option has no effect on the overall assessment score. The free-form response offers the opportunity to enter a textual response to a question that doesn't conform to any of the prepopulated responses provided by the assessment template.

## What's a question group?

A question group is a logical grouping of questions within an assessment template, and is strictly used as a category header for those questions. By naming the question group carefully, you can provide the template user an idea of the type of questions to

## Assessment Template Status Codes

This topic explains the status codes for an assessment template. Throughout the life of an assessment template, you can assign different status codes.

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

- In Progress
- Active
- Retired

### In Progress

This is the initial status of an assessment template. In this status, you can edit any part of the template. This is the only status in which you can delete a template. If the template isn't deleted, it moves to the Active status.

### Active

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

### Retired

When an assessment template is in this status, it's no longer available for general usage. You can't edit any part of it, and you can't move it to any other status. However, it can still be copied. Active templates that are deleted revert to this retired status.

## How Assessment Template Score Range is Calculated

You calculate the score range for an assessment template using the question weights and the ratings and scores assigned to the possible responses for all the questions in the template.



This topic explains how the score range is calculated and the components that are used in the calculation, so that you can make the best decision regarding the feedback text to apply to each score range. In addition to the automatic score range calculation, you can manually adjust the score range by using the administration functionality.

## Settings That Affect Score Range

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

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

## How Score Range Is Calculated

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

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

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

The following table displays the score range calculation based on the components from the previous table.

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

| Rating | Score Range |
|--------|-------------|
|        |             |

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

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

## Opportunity Assessments

### Guidelines for Setting Up Opportunity Assessments

When setting up and maintaining opportunity assessment templates, consider the implementation points described in this topic.

You can find a procedure describing how to set up assessment templates in the [How to Create Assessment Templates](#) topic.

#### Setup Task for Opportunity Assessments

In the Setup and Maintenance work area, the setup task for implementing opportunity assessments is [Manage Opportunity Assessment Templates](#).

#### Assessments Added to Sales Stages

Assessments are available to sales users only after you create an assessment template and then add the assessment template to a sales stage within an opportunity sales method.

#### Mandatory and Recommended Assessments

When adding an assessment to a sales stage, you can mark the assessment as mandatory to be completed for the sales stage. In this case, the user must complete the assessment before moving the opportunity to the next sales stage. If you mark a template as recommended for a sales stage, the user isn't required to complete the assessment before moving to the next sales stage.

#### Opportunity Access Levels for Assessments

The actions that you can perform with opportunity assessments depend on your access levels on an opportunity. This table shows the access levels and actions.

| Access Level | Allowable Actions                                                                                                                      |
|--------------|----------------------------------------------------------------------------------------------------------------------------------------|
| View Only    | <ul style="list-style-type: none"><li>• View assessments in read-only mode</li><li>• Can't add assessments</li></ul>                   |
| Edit or Full | <ul style="list-style-type: none"><li>• Add assessments</li><li>• Edit assessments</li><li>• Delete assessments (if enabled)</li></ul> |

## Allowing Users to Delete Assessments

You may want to enable the **Delete Assessment** button in the Assessments page so that sales representatives can remove an assessment and start over or remove an assessment that's no longer required.

You use Page Composer to add the **Delete Assessment** button. See the Configuring Applications Using Application Composer guide for procedures.

## Enable Multiple Assessments Per Template

To enable sales representatives to perform multiple assessments per assessment template, you must set the profile option, Enable Multiple Assessments Per Assessment Template, to Yes.

### Related Topics

- [How to Create Assessment Templates](#)
- [Enable Multiple Opportunity Assessments Per Template](#)

## Enable Multiple Opportunity Assessments Per Template

Often sales representatives want to re-assess opportunity information and perform several assessments for opportunities using the same assessment template. To enable sales representatives to perform multiple assessments per assessment template, you must set the profile option, Enable Multiple Assessments Per Assessment Template.

## Set the Profile Option

Multiple assessments per assessment template isn't enabled by default. To enable the functionality, set the profile option Enable Multiple Assessments Per Assessment Template (MOW\_MULTIPLE\_ASSESSMENTS\_ENABLED) to Yes at the site level. Follow these steps.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option display name **Enable Multiple Assessments Per Assessment Template** in the **Profile Display Name** field.
3. In the search results list, click the profile option name.

4. In the Profile Values section, select **Yes** from the **Profile Value** list.
5. Click **Save and Close**.

*Related Topics*

- [Perform Multiple Opportunity Assessments Using the Same Template](#)
- [How do I update existing setup data?](#)

## Add Submit and Delete Assessment Buttons Using Page Composer

Salespeople can submit and delete assessments associated with their opportunities through the Edit Opportunity: Assessment subtab. They must have Full or Edit access on the opportunity to submit or delete an assessment.

You must enable the Submit and Delete Assessment buttons in the Assessments page so that sales representatives can submit an assessment or remove an assessment that's no longer required. You use Page Composer to add the Submit and Delete Assessment buttons.

Here's how to add the **Submit** and **Delete Assessment** buttons to the Assessment page for opportunities using Page Composer.

1. Sign in to the application as a user with the Sales Administrator job role. Or, sign in as a setup user.
2. To open Page composer, create and enter a sandbox with Page Composer as one of the tools and select Page Composer from the Tools menu.
3. Activate a sandbox. The active sandbox name appears at the top of the page.
4. Click the user image or name in the global header, and on the Settings and Actions menu, select Edit Pages.
5. With Page Composer in Direct Selection mode, in the Edit Assessment region of the edit opportunity page, hover over the **Save** button.  
  
A colored box appears around the field and its label.
6. Click inside the box around the **Save** button.
7. A dialog box opens with two options:
  - Edit Component
  - Edit Parent Component.
8. Select the **Edit Parent Component** option.
9. In the Component Properties dialog box, click the **Children** tab.
10. Select the check box next to both the **Submit** and **Delete Assessment** items.
11. Click **Apply**.
12. Click **OK** and close Page Composer.

For more information about using Page Composer, see the Configuring and Extending Applications guide.

# Lead Assessments

## Lead Assessments

This topic outlines how lead assessment templates enable a uniform assessment implementation across leads for your organization. Assessment templates provide guidance to sales resources to move the leads further along the sales cycle. Using the lead assessment feature, you can:

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

### Define Lead Assessments Templates

You can define assessment templates to include assessment questions that represent industry best practices, sales methodologies, or a combination of both. As you enter the different responses to the questions, an assessment progress bar provides immediate rating and feedback based on the assessment definition. You can also use assessment templates to standardize lead follow-up procedures. Lead assessment templates enable consistent and predictable assessment for all leads for your business unit.

### Associate Task Templates to Assessment Templates

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

### Assess Leads

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

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

#### *Related Topics*

- [How to Create Assessment Templates](#)
- [What's the difference between lead qualification and lead assessment?](#)

## Enable Multiple Assessments Per Lead Qualification Template

Often sales representatives want to requalify sales lead information and perform several qualifications for leads using the same qualification template. To enable sales representatives to perform multiple assessments per qualification template, you set the profile option Enable Multiple Assessments Per Qualification Template to Yes.

### Set the Profile Option

Multiple assessments per qualification template isn't enabled by default. To enable the functionality, set the profile `Enable Multiple Assessments Per Qualification Template (MOW_MULTIPLE_QUALIFICATIONS_ENABLED)` to Yes at site level. Follow these steps.

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option display name **Enable Multiple Assessments Per Qualification Template** in the **Profile Display Name** field.
3. In the search results list, click the profile option name.
4. In the Profile Values section, select **Yes** from the **Profile Value** list.
5. Click **Save and Close**.

#### Related Topics

- [Perform Multiple Lead Qualifications Using the Same Template](#)
- [How do I update existing setup data?](#)

## Lead Score and Lead Rank Rule Setup

Sales representatives need to score and rank leads so that the lead score determines the rank assigned to the lead. You set up ranking rules based on the score.

Assessments and qualification templates let salespeople evaluate the health of a sales lead. Lead qualifications appear under a separate tab labeled Qualification in the Edit Lead page. For more information, see the related topic, [Example of Defining a Sales Lead Qualification Template](#). Lead assessment is typically done as part of a lead follow-up activity where the lead continues to be progressed after the lead is qualified. You must set the Lead Assessment Enabled profile option to display the Assessments tab in the Edit Lead user interface.

### Define Scoring and Ranking Rules

Define the scoring and ranking rules that you want sales representatives to use in the lead management application. For example, you can navigate to the Manage Assessment Templates page from the Manage Sales Lead Qualification Template implementation task to define the score ranges and corresponding rank and color values as shown in the table:

| Score  | Rank Name | Color  |
|--------|-----------|--------|
| 1-30   | Cold      | Blue   |
| 31-60  | Warm      | Yellow |
| 61-100 | Hot       | Red    |

This example shows that when the sales representative enters a score value of 50 when creating or editing a lead, the rank automatically populates with the value of Warm, and the corresponding yellow color is displayed in the UI. The same color for the score is used when the lead is viewed in a list.

## Setting Up the Scoring and Ranking Rules

This table lists the default values for score and rank that's provided for you.

| Minimum Score | Maximum Score | Rank Name | Color  |
|---------------|---------------|-----------|--------|
| 1             | 30            | Cold      | Green  |
| 31            | 60            | Warm      | Yellow |
| 61            | 100           | Hot       | Red    |

The minimum score and maximum score are numeric text fields and they're required fields. The rank name is determined from the list of values that can be modified from the Rank lookup type MKL\_LEAD\_RANK\_SETID. You can choose a color from your standard UI color widget.

### Related Topics

- [Example of Defining a Sales Lead Qualification Template](#)
- [Lead Assessments](#)
- [How to Create Assessment Templates](#)
- [How Assessment Template Score Range is Calculated](#)





# 30 Task Templates

## Overview of Task Templates

By creating task templates, you can present groups of tasks for salespeople working sales deals. For example, you can create an opportunity task template that displays a set of tasks that need to be performed while working an opportunity.

The tasks generated from the templates are accessible to salespeople in the Activities tab within the applicable sales business object work area.

You can create task templates for these sales business objects:

- Opportunity
- Lead
- Campaign
- Customer

Task templates have such attributes as name, status, type and subtype. Task templates can be striped by business unit in a multiple-business-unit implementation, allowing you to have templates available only to a single set of users.

### *Related Topics*

- [Create a Task Template](#)
- [Create Tasks from a Task Template](#)

## Setup Tasks

### Create a Task Template

When you create task templates, you first create a task template and then you create the individual tasks.

To get started, you must search for the appropriate task template setup task in the Setup and Maintenance work area. Here's a list of the task template tasks for the supported business objects.

| Business Object | Setup Task                              |
|-----------------|-----------------------------------------|
| Opportunity     | Manage Sales Task Templates             |
| Lead            | Manage Sales Lead Task Template         |
| Campaign        | Manage Marketing Campaign Task Template |

| Business Object | Setup Task                           |
|-----------------|--------------------------------------|
| Customer        | Manage Customer Center Task Template |

Here's how to create a task template.

**Note:** In this procedure, the opportunity business object is used as an example. However, the procedure to create task templates is the same for all objects.

1. Sign in as the sales administrator or as a setup user.
2. In the Setup and Maintenance area, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
  - o Task: Manage Sales Task Templates
3. In the Task Template section on the Manage Sales Task Templates page, click the **Add** icon.

The Create Template dialog box appears.

4. Enter the following in the Create Template dialog box:

| Field                    | Description                                                                                                                                    | Example                   |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------|
| Template Name            | Enter the name of the template.                                                                                                                | Sales Coach               |
| Description Template Set | Enter a brief description about the template name, if required.                                                                                | Sales coach template set. |
| Active                   | Indicates that the template is active. The check box is selected by default.                                                                   | Active                    |
| Template Type            | The business object to which the task template is associated is set as default.                                                                | Opportunity               |
| Subtype                  | The default value is blank. If you want to create a task template for assessment you must select Assessment. Otherwise, leave the field blank. | Assessment                |
| Template Set             | Select the template set (Set ID) that you want to associate with your business unit.                                                           | Common Set                |

5. Click **OK**.

The task template is created.

- To create tasks for the task template, click the **Create** icon in the Details section.

The Create Task dialog appears.

- Enter the following in the Create Task dialog box:

| Field             | Description                                                                                                                                                                                                                            | Example                                                                                                                                                                                              |
|-------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subject           | Enter the subject of the task.                                                                                                                                                                                                         | Check Service Requests                                                                                                                                                                               |
| Description       | (Optional) Describe the task.                                                                                                                                                                                                          | Service request task                                                                                                                                                                                 |
| Lead Time         | (Optional) Enter the lead time for the task.                                                                                                                                                                                           | If you enter a lead time the task will begin after those many days. If a task is created from the task template on January 10, and the lead time value is 2, then the task start date is January 12. |
| Type              | (Optional) Select a type for the task.                                                                                                                                                                                                 | Call, Chat, Demo, E-Mail, Meeting                                                                                                                                                                    |
| Template Duration | (Optional) Define the due date for the task.<br>The due date is calculated based on the template duration value and the task start date.<br><br>If the duration is blank in the template task, the task is created without a due date. | If a task start date is January 12 and the template duration is set to 3, then the task due date is January 15.                                                                                      |
| Priority          | (Optional) Select a priority for the task.                                                                                                                                                                                             | High, Medium, Low.                                                                                                                                                                                   |

- Click **OK**.

The task is created for that task template.

**Note:** After you create task templates, there may be additional steps needed for the tasks to display for end users. For example, with opportunities, you associate the task template with sales stages (see the topics for opportunity sales stages and sales methods setup for more information).

## Example of Turning a Business Process into a Task Template

This example illustrates how to create a task template that represents a business process.

## Scenario

A sales manager wants to create a task template for her department's client product demonstration process.

## Client Product Demonstration Activities

The client product demonstration process occurs regularly. The sales manager doesn't want to manually create tasks for this process every time it occurs, so she creates a task template that includes the business process activities. Each time she repeats the business process, she can use the task template to automatically generate the appropriate tasks that need to be performed.

The business process consists of these activities:

- Book a conference room.
- Create an agenda.
- Confirm the date and time with the client.
- Make arrangements with presenters.
- Deliver product demonstration.
- Follow up with client.

## Client Product Demonstration Task Template

Based on the analysis of the business process, here's the task template she creates:

Task Template Name: Client Product Demonstration

| Task                              | Category      | Lead Days | Duration Days |
|-----------------------------------|---------------|-----------|---------------|
| Book conference room              | Preparation   | 1         | 1             |
| Create agenda                     | Preparation   | 1         | 1             |
| Confirm date and time with client | Call          | 5         | 1             |
| Schedule presenters               | Preparation   | 5         | 2             |
| Deliver demonstration             | Demonstration | 7         | 1             |
| Follow up with client             | Call          | 10        | 1             |

### Related Topics

- [How Assessment Templates Work with Task Templates](#)

# Implementation Concepts for Task Templates

## Define Tasks

A task is a unit of work to be completed by one or more people by a specific completion date. Creating tasks can be simplified by using task templates, which are groups of tasks.

### Define Tasks

You define a task with a description, due date, and category. Each task has an owner, who oversees or is responsible for the task, and one or more assignees who perform the work.

You can associate tasks with a business object, such as an opportunity, a customer, or one or more external contacts. Tasks can also have notes for general information and attachments for tracking email or project documents.

### Define Task Templates

Often, a process includes a set of tasks that users need to do repeatedly. To make repetitive tasks quicker and easier, you can define task templates that salespeople then use when working on a particular business object. The salesperson simply selects the appropriate task template for the process at hand, and the application creates the tasks and associates them with the business object being worked.

**Note:** You can modify the task object using Application Composer. For more information, see the Extending CX Sales and Fusion Service guide.

#### Related Topics

- [Create Tasks from a Task Template](#)

## What are the statuses a task can be in?

Tasks can have the following statuses by default. You can change or delete these statuses, or add more to fit your needs.

Here's a list of task statuses and their meanings.

| Status      | Meaning                                                                      |
|-------------|------------------------------------------------------------------------------|
| Canceled    | The task was canceled.                                                       |
| Complete    | The task was completed. You can change this status to another one as needed. |
| In progress | The task is currently active and being worked on.                            |

| Status      | Meaning                                                                 |
|-------------|-------------------------------------------------------------------------|
| Not started | The task hasn't yet been started.                                       |
| On hold     | The task isn't actively being worked on, but hasn't yet been completed. |

If a task is set to Complete, the Percentage Complete field for the task is set to 100 percent, and the end date is set to the current date.

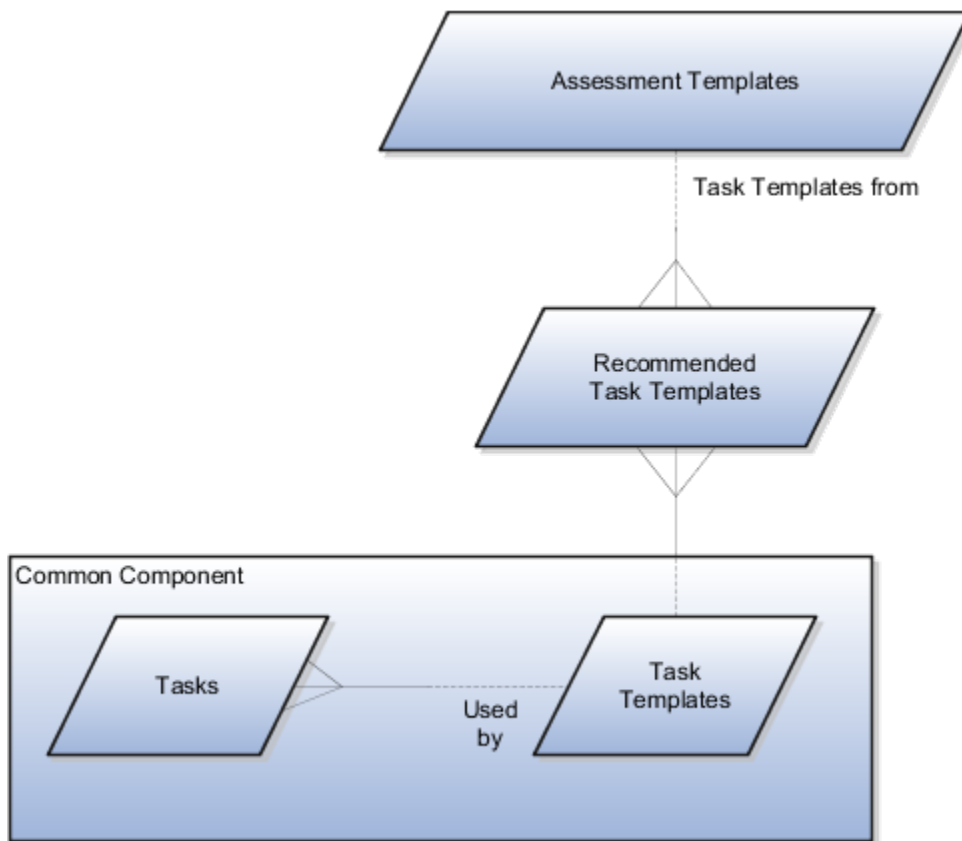
**Note:** If you change the status of a Complete task to something else, the Percentage Complete field value doesn't change automatically.

## Assessments Integration

### How Assessment Templates Work with Task Templates

One of the steps for creating an assessment template is associating task templates. You would take this step if you want to recommend sets of tasks to be done after an assessment is performed using your template.

You associate task templates to ranges of scores in the assessment template, and where the overall assessment score falls within those ranges determines the tasks that are suggested to be performed after the assessment.



## Assessment Template

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

## Task Template

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

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

### Related Topics

- [Example of Turning a Business Process into a Task Template](#)
- [How can I create a task template that's available to associate with assessment templates?](#)

## Associate Task Templates with Assessment Templates

You can associate task templates with assessment templates to recommend tasks to salespersons based on the assessment outcome. As a result of the association, a set of related tasks appear as follow-up activities after a salesperson completes the assessment for an object.

Task templates are predefined, individual tasks that you can group together and associate with an object. Template tasks are a set or group of individual tasks from the task template. You can only create a task template for these objects:

- Opportunity
- Lead
- Campaign
- Customer

**Note:** To be available for selection, the task template must have a subtype of **Assessment** and belong to the same object as the assessment template. For example, when creating an assessment for an opportunity, you must select an opportunity task template.

Here's how to associate task templates:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Opportunities
  - Task: Manage Opportunity Assessment Templates
2. In the Manage Opportunity Assessment Templates page, click **Create** and follow the setup steps.

**Note:** The last task in the setup flow is to associate task templates.

3. Navigate to the Associate Task Templates page.
4. Click the **Create** icon.
5. Select the task template that you want to associate with the assessment template.
6. Click **OK**.

The selected task template appears in the Associate Task Templates page.

**Note:** If you enter a score range, you can view the task template only when the assessment is within that score range.

7. Click **Save**.

The task template is now associated with the assessment template.



#### Related Topics

- [How Assessment Templates Work with Task Templates](#)
- [Considerations for Setting Up Assessment Templates](#)
- [Assessment Template Components](#)
- [How to Create Assessment Templates](#)
- [Perform an Opportunity Assessment](#)

## How can I create a task template that's available to associate with assessment templates?

Create the task template with a subtype of Assessment.

## Partner Integration

### Create Partner Task Templates

A task template is a group of tasks associated with a business object, such as Partners.

Users with the Customer Relationship Management Application Administrator or Application Implementation Consultant job roles can use the Manage Partner Task Template setup task to create task templates for partners. Channel managers and partner administrators can then use these templates to quickly create multiple tasks with a single click. The tasks generated from the template are accessible to users in the Activities subtab on Partner pages.

By default, this feature is hidden, however sales administrators can use Application Composer to expose a 'smart' Create Task button on the Embedded task list of the Activity object. When a valid task template has been created, a Create Tasks from a Template option is available from the Create Task button. If no valid task templates have been created, then the Create Task button functions as it always has.

The process of creating task templates and making them available to channel managers and partner administrators involves the following:

1. Create the task template and create the individual tasks for the template.
2. Expose the 'smart' Create Task button on the Embedded task list of the Activity object.

### Create a Partner Task Template

Users with the Customer Relationship Management Application Administrator or Application Implementation Consultant job roles can use these steps to create task templates for partners.

1. Sign in with your Customer Relationship Management Application Administrator or Application Implementation Consultant credentials.
2. Navigate to the Sales offering in Setup and Maintenance.
3. Search for and select the **Manage Partner Task Template** setup task.
4. On the Manage Partner Task Template page, click the **Create** icon.
5. On the Create Template pop-up, provide information in the following fields:

The following table lists the fields available on the Create Template pop-up and provides a description for each field.

| Field                    | Description                                                                                                                                       |
|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| Template Name            | Enter the name of the template.                                                                                                                   |
| Description Template Set | Enter a brief description about the template name, if required.                                                                                   |
| Active                   | Selecting this check box indicates that the template is active. The check box is selected by default.                                             |
| Template Type            | The business object to which the task template is associated is set as default. For partner task templates, the template type is Partner Profile. |
| Subtype                  | The default value is blank. If you want to create a task template for assessment you must select Assessment. Otherwise, leave the field blank.    |
| Template Set             | Select the template set (Set ID) that you want to associate with your business unit.                                                              |

6. On the Create Template pop-up, click **OK**.
7. To create tasks for the task template, click the **Create** icon in the Details section.
8. On the Create Task pop-up, provide information in the following fields:

The following table lists the fields available on the Create Task pop-up and provides a description for each field.

| Field             | Description                                                                                                                                                                                                                         |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Subject           | Provide a subject for the task.                                                                                                                                                                                                     |
| Description       | (Optional) Describe the task.                                                                                                                                                                                                       |
| Lead Time         | (Optional) Enter the lead time for the task.                                                                                                                                                                                        |
| Type              | (Optional) Select a type for the task.                                                                                                                                                                                              |
| Template Duration | (Optional) Define the due date for the task. The due date is calculated based on the template duration value and the task start date.<br><br>If the duration is blank in the template task, the task is created without a due date. |

| Field    | Description                                |
|----------|--------------------------------------------|
| Priority | (Optional) Select a priority for the task. |

9. On the Create Task pop-up, click **OK**.
10. Click **Save and Close** to save your work

## Add the Smart Create Task Button to Activity Pages

Use these steps to replace the Create Task button with the 'smart' Create Task button on Activity pages.

1. Sign in with your Sales Administrator credentials.
2. Ensure you are in a sandbox.
3. From the Navigator, click **Application Composer**.
4. From the list of Standard objects, expand **Activity**.
5. Click the **Pages** link.
6. In the Activity Pages list, scroll down to the Embedded Task List Overview page.
7. Duplicate the standard layout and click **Create and Edit**.
8. On the Edit Layout page for your duplicate layout, click the **Edit** icon for the Embedded Task List Overview Table.
9. In the Configure Detail Form: Buttons and Actions area, move the **Create Task + Create Task From Template** button from the Available Buttons column to the Selected Buttons column.
10. In the Configure Detail Form: Buttons and Actions area, move the **Create Task** button from the Selected Buttons column to the Available Buttons column.
11. Click **Save and Close** and click **Done** to save your work.
12. Publish your sandbox.



# 31 Forecasting

## Enable Forecasts with Quick Setup

You can set up quarterly forecasts with one step.

Skip the Quick Setup if you already enabled forecasting by opportunity owner in Setup Assistant. If you already set up dimensional territories or plan to do so, then use the Select Forecasting Options task instead of the quick setup.

These prerequisites are likely already done.

1. Set up your accounting calendar. The periods must be either monthly or quarterly.
2. Set up your hierarchy of sales resources.

To enable forecasts:

1. Enable one territory dimension and activate.
  - a. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Territories
    - Task: Enable dimensions and Metrics
  - b. Click **Select and Add** to enable one dimension, such as Account Type.
  - c. Save and close.
  - d. Click **Load and Activate**.
2. Create at least one opportunity with a future close date.
3. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Sales Forecasting
4. Click Quick Setup, the gear icon in the Functional Area.
5. In the Configure Simplified Sales Forecasting page, the two options are selected for you. Click **Submit**.

Your submission sets up all these areas for you.

- You have a territory hierarchy to match your sales resource hierarchy, with the resources as territory owners. The Refresh Territories from Resources process synchronizes your territories to match your latest resource hierarchy. The territories have Resource-Centric coverage and are called Resource-Centric territories. (The process requires at least one enabled territory dimension.)
- Opportunities are automatically assigned to territories by owner.
- Forecasts roll up the territory hierarchy.
- You have quarterly forecasts.
- Salespeople can adjust their forecasts each month if your accounting period is monthly.
- You can forecast product totals.
- You can use quotas.
- The Forecasting Autopilot process runs every hour.

## Remove Your Resource-Centric Territory Hierarchy

If you used the quick setup and then decided you won't use the resource-centric territory hierarchy, you can remove it.

1. Navigate to **Scheduled Processes**.
2. Click **Schedule New Process**.
3. Find **Refresh Territories from Resources**.
4. Click **OK**.
5. In the **Diagnostic Parameters** field, enter `from_resource=-1`
6. Click **Submit**.

## Overview of Forecasts

Your forecasts of future sales provides predictions of future revenue for specific time periods. Management uses sales forecast data to set production schedules and volumes, to determine resource requirements, and to report financial guidance to investors.

| What You Can Do                        | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Submit forecasts                       | <p>You can view, manage, and submit your forecasts in the office and using the mobile application. You can:</p> <ul style="list-style-type: none"><li>• Review your forecasted product items and submit the forecast.</li><li>• View your pipeline that isn't forecasted.</li><li>• Use embedded analytics to improve forecast accuracy.</li></ul>                                                                                                                                                                                                                                                                                                                                                                                                    |
| View automatically generated forecasts | <p>Your forecast for a period is automatically generated from eligible opportunity product items scheduled to close within the period. Forecasts are refreshed from the pipeline revenue in real time. Opportunities and forecast items continue to synchronize until you submit forecast items for final approval.</p> <p>The sales administrator sets the criteria that determine whether a product item is eligible to be automatically included in a forecast. The administrator also provides the option for you to override the established criteria and manually include or exclude a product item from the forecast.</p> <p>Forecasting reflects any edits you make to an opportunity, or any adjustments at the deal level in real time.</p> |
| Forecast by territory                  | <p>You forecast sales by territory. The forecasts roll up following the territory hierarchy. If enabled, subscription renewal forecasts roll up in a separate column from new forecasts that aren't renewals. The Forecast column shows the total for both new and renewal forecasts.</p> <p>Changes to the active territory hierarchy are periodically synchronized with the forecast hierarchy up until a freeze date. After the territory freeze date, you can make changes to your forecasts.</p>                                                                                                                                                                                                                                                 |
| Compare forecasts                      | <p>You can view current, future, and past forecasts. The current forecast is open for editing at certain times and then frozen. Your manager can view the latest forecasting data and compare it to key metrics such as pipeline and won revenue.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

| What You Can Do                | Details                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
|--------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Adjust forecasts               | Sales managers can review and adjust forecasts anywhere. Subscription renewals can be adjusted separately by choosing the Renewals category to display. The New category shows all except renewals. Select All to see the total forecast.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Manage subordinates' forecasts | <p>You can quickly see which salespeople have submitted their forecasts, what has changed since the previous forecast, and the opportunities that comprise the forecast. You can also drill into your subordinates' forecasts to view a forecast the same way that the salesperson sees it. This provides sales managers with the opportunity for more effective coaching and greater forecast accuracy.</p> <p>You can add, remove, or adjust individual lines in a salesperson's forecast, segment the totals by time period, and override forecast totals for each salesperson. Any adjustments are clearly identified throughout the forecast hierarchy, allowing management to quickly view the changes made by sales managers who are on their team.</p> |
| Record overlay forecasts       | You can record overlay forecasts on opportunity revenue transactions in addition to the revenue sales credit split. Overlay forecasts allow nonprimary salespeople to forecast sales expectations for all overlay sales credits.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Forecast by product            | If enabled, you can forecast by product, forecasting amount, and quantity. If your products include subscriptions, you can forecast subscription renewals separately from new forecast items by choosing the category.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

## Setup Tasks

### Overview of Implementing Forecasting

Salespeople forecast sales by territory as well as by individual salesperson or other resources. The application generates forecasts from opportunities according to configured options.

Revenue for opportunities with close dates that fall within a forecast time period is added into the forecast for that time period for the related territory and salespeople for that opportunity. Here's a high level look at what you need to do to implement forecasting:

1. Configure territories.
2. Configure opportunities.
3. Enable forecasting from the Select Forecasting Options task.

The application generates your forecast submission windows and sets default forecasting options. It also schedules the required forecasting background processes.

4. Change forecasting options and submission window dates, if needed.

#### Related Topics

- [Enable Forecasting](#)

## Enable Forecasting

You must enable forecasting if you want salespeople to predict future sales. When you first implement forecasting, you have a schedule of quarterly forecasts with monthly submissions.

The forecast periods extend one year into the future. You can modify these initial settings at any time.

Here are initial settings in the Forecast Period Parameters region of the Select Forecasting Options page used to generate your forecast submission windows.

| Field                          | Explanation                                                                                                                                                                                                              | Provided Values                                                                                                                                                                                                                    |
|--------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Forecast Period                | Each forecast includes only those opportunities set to close in the forecast period.                                                                                                                                     | <b>Quarter</b>                                                                                                                                                                                                                     |
| Adjustment Period              | This read-only field displays the type of period you selected when you set up your accounting calendar. Typically and for Vision Corp. this is a month.                                                                  | This field isn't editable.                                                                                                                                                                                                         |
| Forecast Frequency             | The number of submission windows you want for each forecast period.                                                                                                                                                      | <b>3</b>                                                                                                                                                                                                                           |
| First Forecast Due Date        | The date you want the first submission window to end relative to the forecast period. The application takes the forecast snapshot at the end of the day.                                                                 | For the first forecast submission window to end on the last day of the first month in each quarter, you see <b>31days After the forecast period start date</b> .                                                                   |
| First Territory Freeze Date    | The number of days before the end date when you want the submission window to start.<br><br>Any sales territory changes after this freeze date are ignored and applied only to subsequent forecasting windows.           | For the forecast submission windows to start at the beginning of each month, the number provided is <b>31</b> .                                                                                                                    |
| Number of Concurrent Forecasts | A concurrent forecast is where two or more forecast periods can both be updated at the same time.                                                                                                                        | This field is set to <b>1</b> and the scheduled forecasts are generated with no gaps in between forecasts freeze dates and due dates. The freeze date of the first forecast is set to the due date of the next scheduled forecast. |
| Number of Scheduled Periods    | The number of forecast periods you want to view.<br><br>Managers can only adjust the forecast for the current period during the submission windows you generated, but you can view the forecasts for subsequent periods. | The number of forecast periods is set to <b>4</b> for the whole year.                                                                                                                                                              |



These additional options were also set for you.

- Opportunity items that match the forecasting criteria are added to the forecast according to their scheduled close dates. the provided forecast criteria is win probability greater than or equal to 70 percent.
- Selecting the **Enable Forecast Criteria Override** option makes it possible for salespeople or their managers to include or exclude an opportunity from a forecast regardless of its win probability. It wasn't selected for you when you enabled forecasting. Select the option if you're following the Getting Started use case. Then salespeople can make a selection from the Include in Forecast list while editing an opportunity.
- The **Enable overlay forecasting** option is deselected.
- The **Enable Product Totals** option was selected for you. Users can adjust forecasts by product rather than by territories. Selecting this option displays the Products tab in the Edit Forecasts window where users can make the adjustments.
- The number of sales catalog levels you can edit in the Products tab is set to 2 in the Product Hierarchy Depth field.
- Pipeline and Closed Revenue metrics were enabled. The Forecasts landing page displays a Forecast Overview chart that compares your forecast with won revenue and open pipeline. It also displays a second bar chart that shows your forecast by time periods.

## Enable Forecasting

To enable forecasting:

1. In the Setup and Maintenance work area, go to the following:
  - Offering: Sales
  - Functional Area: Forecasting
  - Task: Select Forecasting Options
2. Select **Enable Forecasting**.
3. Click **Submit**.
4. Background processes run to generate your forecasts and are scheduled to run periodically to keep your forecast up to date.

You can work in your generated forecasts. You can also navigate to Select Forecasting Options and make changes to options and to forecast period dates.

## Generate Forecast Submission Windows and Set Forecasting Options

After you enable forecasting, you can make changes to match your business practices using the Select Forecasting Options page. Set how far in advance and how frequently you forecast and generate the forecasting submission windows.

You can also change the criteria that determine which opportunities to include in a forecast and you can permit adjustments by product or by territory.

## Select Forecasting Options Page Overview

This table highlights the regions shown in the image and provides an overview of the entries described in detail in the sections that follow the image.

| Callout Number | Region Name                | Overview                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----------------|----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1              | Forecast Period Parameters | <p>Enter the parameters that the application uses to generate the dates for each forecast and the forecast submission windows.</p> <p>During each window, your sales organization can update the forecast for the current period. Usually this window starts right after the last forecasting call with sales management and ends just before the next one.</p> <p>At the end of each window, the application takes a snapshot of your organization's forecasts so the forecasts are ready for your call.</p> <p>The generated submission windows appear in the Scheduled Forecasts region where you can adjust them to conform with your actual forecasting schedule.</p> <p>The automatically generated submission windows are approximations only, so you must adjust the dates manually.</p> |
| 2              | Forecast Criteria          | <p>Enter the criteria the application uses to determine which opportunities to include in the forecast.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| 3              | Product Tab                | <p>Enable Product Totals was selected for you to enable the Products tab. Sales managers use the tab to adjust forecasts by product group rather than by territories. Deselect Enable Product Totals to enable adjustments by territories.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
| 4              | Metrics                    | <p>The selected metrics are pipeline and closed revenue for the pipeline/won graph. The Quota selection enables the Forecast/Quota graph.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| 5              | Additional Settings        | <p>Use this region to enable the forecast trend graph and adjustment notes. You can also disable resource forecasting.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 6              | Scheduled Forecasts        | <p>The application displays the generated forecast submission windows in this region. You can manually adjust the dates of each submission window as needed. For example, the forecast due date can't be later than the end date for the forecast period.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

These UIs are described in the table.

Select Forecasting Options ?

Currency = US Dollar

1

Forecast Period Parameters

☒ Enable Forecasting

\* Email Address

\* Forecast Period

Quarter

▼

Adjustment Period

Fiscal period

\* Forecast Frequency

3

\* First Forecast Due Date

5

Days

☒ After the forecast period start date

☐ Before the forecast period start date

\* Territory Freeze Date

5

Days Before the Forecast Due Date

Number of Concurrent Forecasts

1

\* Number of Scheduled Periods

5

## Unadjusted Forecast Criteria

2

- ☐ Enable nonrevenue forecasting
- ☒ Enable Forecast Criteria Override

Probability ▼ Greater than or equal ▼ 70 + -

## Product Tab ?

3

- ☒ Enable Product Totals
- \* Product Hierarchy Depth 4 ▼

## Metrics ?

4

- ☒ Pipeline ☒ Closed Revenue ☒ Best Case Forecast ☒ Estimated Adjustment
- ☒ Quota ☒ Expected Forecast ☒ Worst Case Forecast

## Additional Settings

5

- ☐ Enable Forecast Trend Graph
- ☒ Enable Adjustment Notes
- ☒ Enable Resource Forecasting

## Scheduled Forecasts

6

Actions ▼ View ▼ Format ▼ ✕ 📄

| * Forecast Name      | Start Date | End Date   | Territory Freeze Dat     | Due Date                  | Request ID |
|----------------------|------------|------------|--------------------------|---------------------------|------------|
| Q4-2021 - 2021/11/30 | 10/1/2021  | 12/31/2021 | 11/1/2021 <span>📅</span> | 11/30/2021 <span>📅</span> |            |
| Q4-2021 - 2021/12/31 | 10/1/2021  | 12/31/2021 | 12/1/2021                | 12/31/2021                |            |
| Q1-2022 - 2022/01/31 | 1/1/2022   | 3/31/2022  | 1/1/2022                 | 1/31/2022                 |            |
| Q1-2022 - 2022/02/28 | 1/1/2022   | 3/31/2022  | 2/1/2022                 | 2/28/2022                 |            |
| Q1-2022 - 2022/03/31 | 1/1/2022   | 3/31/2022  | 3/1/2022                 | 3/31/2022                 |            |
| Q2-2022 - 2022/04/30 | 4/1/2022   | 6/30/2022  | 4/1/2022                 | 4/30/2022                 |            |
| Q2-2022 - 2022/05/31 | 4/1/2022   | 6/30/2022  | 5/1/2022                 | 5/31/2022                 |            |
| Q2-2022 - 2022/06/30 | 4/1/2022   | 6/30/2022  | 6/1/2022                 | 6/30/2022                 |            |
| Q3-2022 - 2022/07/06 | 7/1/2022   | 9/30/2022  | 7/1/2022                 | 7/6/2022                  |            |
| Q3-2022 - 2022/08/05 | 7/1/2022   | 9/30/2022  | 7/7/2022                 | 8/5/2022                  |            |

## Create the Forecast Submission Windows

You generate the forecast submission windows on your calendar by entering parameters in the Forecast Period Parameters region. Each submission window is defined by these dates:

- It starts on a **Territory Freeze Date** (indicated by callout 1 in the figure)
- It ends on the forecast **Due Date** (callout 2)

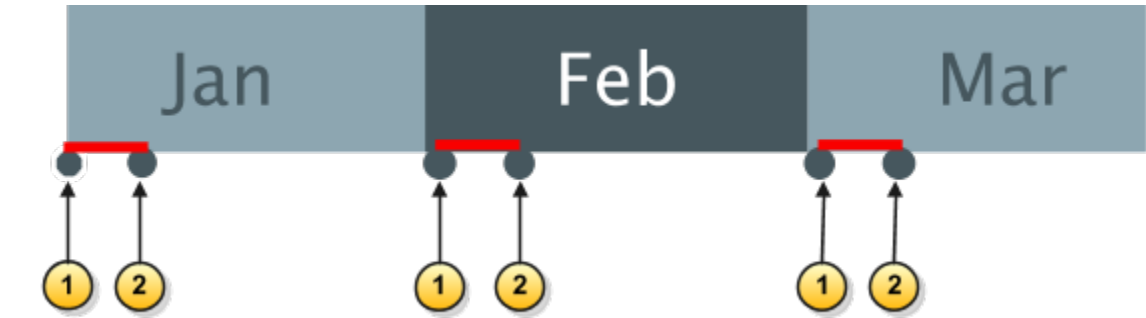
Here's what happens before each freeze date:

- The forecast is read only.
- Changes to the territory and product hierarchy are synchronized to the forecast.
- Changes to opportunity items are synchronized to forecast items.

Here's what happens after each freeze date:

- Sales users can edit, adjust, and submit forecasts.
- Changes to opportunity items are synchronized to forecast items.
- Salespeople must adjust and submit their forecast between the territory freeze date and the due date.

Submission windows occur between arrows one and two for January, February, and March.



After salespeople submit their forecasts, they can't edit them, but the forecasts can be adjusted by managers. After the due date is reached, each forecast becomes read-only.

1. In the Setup and Maintenance work area, go to the **Select Forecasting Options** task:
  - Offering: Sales
  - Functional Area: Sales Forecasting
2. In the Forecast Period Parameters region, enter the options to generate forecasts and the approximate forecast submission windows.

This table describes the options and provided values for submitting monthly forecasts for the current quarter.

| Field           | Explanation                                                                                               | Provided and Suggested Values |
|-----------------|-----------------------------------------------------------------------------------------------------------|-------------------------------|
| Forecast Period | Typically a quarter. Each forecast includes only those opportunities set to close in the forecast period. | <b>Quarter</b>                |

| Field                          | Explanation                                                                                                                                                                                                           | Provided and Suggested Values                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|--------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Adjustment Period              | This read-only field displays the type of period you selected when you set up your accounting calendar. Typically and for Vision Corp. this is a month.                                                               | This field isn't editable.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Forecast Frequency             | Enter the number of submission windows you want to generate for each forecast period.                                                                                                                                 | Because you hold a forecasting call each month and there are three months in each quarter, the value is 3.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| First Forecast Due Date        | The date you want the first submission window to end relative to the forecast period. The application takes the forecast snapshot at the end of the day.                                                              | <p>For the first forecast submission window to end on the last day of the first month in each quarter, you see <b>31</b> in the <b>First Forecast Due Date</b> field and the <b>After the forecast period start date</b> option selected.</p> <p>The application generates the subsequent submission windows based on the number of days you enter here and in the <b>Territory Freeze Date</b> field, but because each calendar month has a different length, entering 31 generates submission windows with some overlap.</p> <p>During overlapping submission windows salespeople and their managers see two forecast submission windows, but you can choose to ignore these overlaps or adjust the dates after you generate the scheduled forecasts.</p> <p>Forecasting periods can overlap and can have gaps, but any gaps result in periods where users can't submit or edit their forecasts.</p> |
| First Territory Freeze Date    | <p>The number of days before the end date when you want the submission window to start.</p> <p>Any sales territory changes after this freeze date are ignored and applied only to subsequent forecasting windows.</p> | For the forecast submission windows to start at the beginning of each month, the number provided is 31.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| Number of Concurrent Forecasts | A concurrent forecast is where two or more forecast periods can both be updated at                                                                                                                                    | After you enable Forecasting the value is <b>1</b> and the scheduled forecasts are generated                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

| Field                       | Explanation                                                                                                                                                                                                                     | Provided and Suggested Values                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|-----------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                             | the same time. You can limit the number of concurrent forecasts and the generated periods                                                                                                                                       | <p>with no gaps in between forecasts due dates and following freeze dates. The due date of the first forecast will be set to the freeze date of the next scheduled forecast.</p> <p>If you enter <b>2</b>, then the scheduled forecasts are generated so that both the current period and the next period are frozen at the same time, and there will be no gaps in between forecasts due dates and freeze dates. The due date of the first forecast will be set to the freeze date of the next scheduled forecast.</p> <p>If the value is left blank, then the generated forecast dates can have gaps or overlaps.</p> |
| Number of Scheduled Periods | <p>The number of forecast periods you want to view.</p> <p>Managers can only adjust the forecast for the current period during the submission windows you generated, but you can view the forecasts for subsequent periods.</p> | The number of forecast periods is set to <b>4</b> (four quarters) for the whole year. You can change the number of forecast periods.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

3. If you modified forecast period options, then click **Submit**.
4. The Forecast Autopilot process runs at the next scheduled time. It reschedules the other processes. The processes regenerate your forecasts. The Select Forecasting Options page is unavailable until the processes

completes. When the process completes, the generated submission windows appear in the Scheduled Forecasts region. The windows will look similar to what's included in the next table.

- The Forecast Name

The system-generated name for each submission window.

- Start Date

The start date of the forecasting period, the beginning of the quarter.

- End Date

The end date for the forecasting period, the end of the quarter.

- Territory Freeze Date

The start date for the forecast submission window.

- Due Date

The end date for the forecast submission window, the period when the sales organization can adjust forecasts. At the end of this date the application takes a snapshot of the forecast and opens a new window.

The forecast is frozen on the due date regardless if users click the submit button. After the due date passes, the active forecast is marked as past, and the next forecast is marked as active.

5. Click the **Select Forecasting Options** task link again.

The Select Forecasting Options page shows the status of the period generation process. The status doesn't refresh automatically, so you may have to click **Cancel** to return to the Setup and Maintenance work area and try again later.

| Forecast Name        | Start Date | End Date   | Territory Freeze Date | Due Date   |
|----------------------|------------|------------|-----------------------|------------|
| Q3-2023 -2023/08/01  | 7/1/2023   | 9/30/2023  | 7/1/2023              | 8/1/2023   |
| Q3-2023 -2023/08/31  | 7/1/2023   | 9/30/2023  | 8/1/2023              | 9/1/2023   |
| Q3-2023 -2023/08/31  | 7/1/2023   | 9/30/2023  | 9/1/2023              | 9/30/2023  |
| Q4-2023 - 2023/11/01 | 10/1/2023  | 12/31/2023 | 10/1/2023             | 10/31/2023 |
| Q4-2023 - 2023/12/01 | 11/1/2023  | 12/31/2023 | 11/1/2023             | 12/1/2023  |
| Q4-2023 - 2023/12/31 | 12/1/2023  | 12/31/2023 | 12/1/2023             | 12/31/2023 |

**Note:** If you're in the middle of a quarter, for example Q3, the application may only generate one or two scheduled forecasts for that quarter.



6. Because the periods are generated based on a fixed number of days you entered as parameters and the number of days in a month varies, you must modify the start and end dates of each submission window by entering new dates in the **Territory Freeze Date** and **Due Date** fields. You can enter today as the freeze date, but not a date in the past. Make sure your due dates aren't later than the forecast period end date, or dates in the past.

**Note:** The application automatically generates new submission windows at the end of each quarter. You must continue to manually adjust these windows as they're generated.

7. Click **Submit** when you're done.

## Set Forecasting Criteria

Opportunity items that match the forecasting criteria are added to the forecast according to their scheduled close dates.

1. The provided criteria is win probability greater than or equal to 70 percent. You may want to specify the probability that matches the default probability of the appropriate sales stage in your sales method. You can add or use other criteria.

**Note:** By default, the win probability and close date are set at the opportunity level. To forecast at the level of individual opportunity lines, expose the win probabilities for the lines in the Edit Opportunity page using Application Composer.

2. Selecting the **Enable Forecast Criteria Override** option makes it possible for salespeople or their managers to include or exclude an opportunity from a forecast regardless of its win probability. It wasn't selected for you when you enabled forecasting. If you select the option, then salespeople can make a selection from the Include in Forecast list while editing an opportunity.

If you don't want users to use this list, then you must hide this field on the opportunity UI by using Application Composer. Leaving the **Enable Forecast Criteria Override** option deselected doesn't by itself prevent users from making a selection from the list.

**Note:** Even when you disable the **Include in Forecast** list, users can always edit an opportunity to exclude it from the forecast, for example, by entering a different win probability.

3. Select the **Enable nonrevenue forecasting** option if you want to generate separate forecasts for overlay territories.

## Enable Forecast Adjustments by Product

You can choose to adjust forecasts by product:

1. The **Enable Product Totals** option was selected for you. Users can adjust forecasts by product rather than by territories. Selecting this option displays the Products tab in the Edit Forecasts window where users can make the adjustments. See callout 1 in the figure at the beginning of this topic.
2. The number of sales catalog levels you can edit in the Products tab is set to 2 in the Product Hierarchy Depth field. To improve usability, Oracle recommends setting the depth to 1 unless there's a compelling business need to break the forecast out beyond the first level of the product group hierarchy.

## Adjustment Notes, Forecast Trend Graph, and Resource Forecasting Settings

The Forecasts landing page displays a Forecast Overview chart that compares your forecast with won revenue and open pipeline. It also displays a second bar chart that shows your forecast by time periods. If you enable the Quota metric, then the landing page displays a quota to forecast chart instead of the forecast by period. Your third option is

the forecast trend graph to be the second chart. If enabled, sales managers can add notes about their adjustments when they adjust forecasts. These aren't enabled for you. To enable adjustment notes and the forecast trend graph:

- Select **Enable Forecast Trend Graph** to replace the period bar graph, or the quota chart if you use quotas, with the forecast trend graph.

For the displayed territory, forecast period, and type of forecast, you can see these graphs:

- Current and past forecast snapshots
- Won revenue trend
- Quota
- Select **Enable Adjustment Notes** to enable notes for adjustments. Sales managers can then add adjustment notes for each forecast item. They can also create and edit a single adjustment note for summary territory adjustments or a note for summary product adjustments.
- The Enable Resource Forecasting option is selected if you used the Quick Setup. It's deselected if you used the Enable Forecasting task. Here's what happens if you make changes to the Enable Resource Forecasting setting:
  - If you deselect **Enable Resource Forecasting**, then it will automatically delete all the resource territories and switch off owner-based assignment of opportunities. The Refresh Forecast process deletes resource territories from any future forecasts. Current active forecasts retain the resource territory hierarchy. You can set up dimensional territories and assignment will again work for the dimensional territories.
  - If you select Enable Resource Forecasting under Additional Settings after defining some dimensional territories, then the resource territory hierarchy is created under your existing Global territory. Your assignment settings change to assign opportunities by owner. The Refresh Forecast process deletes dimension territories from any future forecasts. Current active forecasts retain the existing territory hierarchy.

## Implement Unit Forecasting

You can forecast by territory and amount, by product and amount, and by product and quantity of units. This topic explains the steps to implement unit forecasting.

Opportunity items often include quantity, price, and either a calculated amount from quantity and price or an entered amount. The opportunity items are aggregated into forecasts by close date using these methods:

- Total the amounts for the time period and territory.
- Total the amounts for the time period and by product.
- Total the quantities for the time period and by product.

When you first enable forecasting, forecasting by product is the default setting. Only the amount (quantity times price) is forecasted. You can make changes to forecast quantity.

1. In the Setup and Maintenance work area, go to the **Manage Forecast Metrics** task:
  - Offering: Sales
  - Functional Area: Sales Forecasting
2. In the Lookup Codes region, find the lookup code **ORA\_QUANTITY** and check the Enabled box.
3. Save and close.

Quantity is enabled for the Products tab and can be edited in the Forecast Items tab.

4. In Select Forecasting Options, the Summary Tab region, select **Enable Product Totals**.

The Edit Forecast page will include the Products tab.

5. Select the number of sales catalog levels you want to edit in the Product tab in the **Product Hierarchy Depth** field. Oracle recommends setting the depth to **1**.

## Implement Renewal Forecasting

When a customer subscription renews, the opportunity revenue line is set to Renew, and it's included in the Renewal forecast, if enabled.

Set the profile option to enable renewal forecasting:

1. In the Setup and Maintenance work area, go to the Manage Administrator Profile Values task:
  - o Offering: Sales
  - o Functional Area: Sales Foundation
2. Search for and select the profile option, ORA\_ZSF\_ENABLE\_RENEWAL\_FCST, **Enable Renewal and Net New Forecasting**.
3. In the Profile Values section, set the value to **Y** at the site level.
4. Save and close.

Managers can adjust forecasts for renewals separately from the traditional new forecasts. They can select New, Renewal, or All from a Category list.

## Implementation Concepts for Forecasting

### Sales Forecast Components

Several things come together to make up your forecast, and you have several ways to control forecasts. This chart works from the bottom up, much like your forecast.

| Original Forecast  |                 |               |               | Adjusted Forecast |
|--------------------|-----------------|---------------|---------------|-------------------|
| Forecast Territory | Forecast Period | Product Items | Credit Totals | Adjustment        |



| Opportunity | Product Item |                | Product Item Credit |
|-------------|--------------|----------------|---------------------|
| Territory   | Close Date   | Match Criteria | Revenue Credit      |
| Territory   | Close Date   | Override       | Overlay Credit      |

The components in the chart are explained here.

- You have one or more territories, and the territories form a hierarchy. It's likely your manager owns a parent territory to yours.
- You have sales opportunities. An opportunity contains one or more product items, and each product item is assigned to a territory. In this case, your territory.
- The close date of each product item determines which forecast includes it. A product item with a February close date appears in the First Quarter forecast.
- If your product item matches the criteria set for the forecast, then it's included in your forecast. An example of criteria is the win probability must be greater than 70 percent.
- If your product item doesn't match the criteria, you can use the criteria override to manually include the item in your forecast. Or you can manually exclude one that does match.
- As the primary salesperson for the product item, you count the revenue credit in your forecast and it rolls up to the parent territory revenue forecast.
- You can forecast an overlay credit for a product item owned by someone else. You have separate overlay forecasts to track overlay credits.
- Open product items and won items added together form your original forecast for a specific territory and forecast period, such as the first quarter. You can then make adjustments to product items and to your overall forecast. You now have your adjusted forecast and you can submit it to your manager.

## Forecast Criteria

You set the forecasting criteria that determines what product items are automatically included in the sales forecast. The product items become the total forecast amount before adjustments.

Your forecast includes open forecasted items and items closed as won. The items also meet these criteria:

- The item close date falls within the forecast period.
- The item is assigned to your forecasted territory.
- The item matches the forecast criteria. For example, include in the forecast all product items with a win probability greater than 70 percent. Or, You set the override for the forecast item to always include it in the forecast.

You can keep items out of your forecast by setting the override to never include an item in the forecast. Items closed as lost don't appear in your forecast.

## Forecast Criteria Logic

The logic joins each set criterion with AND. If two criteria are for the same attribute and use equals, then they're joined by OR.

Here are example criteria:

- Status = Open
- Status = WIP
- Product <> CRM
- Product <> ERP
- Win Probability > 20
- Win Probability < 80

Here's how the criteria are translated logically:

- (Status = Open OR Status = WIP) AND
- Product <> CRM AND
- Product <> ERP AND
- Win Probability > 20 AND
- Win Probability < 80

### *Related Topics*

- [Overlay Forecasts](#)
- [Set Opportunity Revenue Forecast Criteria](#)

## Overlay Forecasts

Overlay resources who aren't the owners of the primary territory can submit a forecast on the same revenue as the primary sales resource. The primary sales resource submits a prime forecast, and the amount should be counted only once for the prime forecast.

The overlay resource submits an overlay forecast, counting the same revenue a second time. If multiple overlay resources forecast the same deal, then the same revenue amount can be added to the overlay forecast many times. A primary resource for one territory can submit an overlay forecast for another territory, so the context of the territory determines if a user is submitting a prime or an overlay forecast.

Users can submit both prime and overlay forecasts. In this case, management often expects a certain ratio of prime to overlay amounts. Management can further analyze any major discrepancy from the ratio. The overlay forecast is taken from the nonrevenue credit split within opportunities, and is closely associated with the nonrevenue quota goals set on the territory.

The administrator must enable overlay forecasting using the Enable nonrevenue forecasting check box in the Select Forecasting Options page before salespeople can add to overlay forecasts.

## Territories

In the Enable Forecasting field, you can designate territories as disabled for forecasts, or as forecastable for prime, for overlay, or for both.

An owner of an overlay territory can't access a prime forecast, and an owner of a prime territory can't access an overlay forecast. However, when managing revenue, it's possible to assign a revenue split to an overlay territory or a nonrevenue split to a prime territory.

## Territory Freeze Date

You can begin forecasting activities on the territory freeze date. The territory hierarchy used for forecasts freezes on this date. Forecast rollups from territories to parent territories follow the frozen hierarchy until the forecast due date.

Salespeople can submit their forecasts only after the territory freeze date and before the forecast due date. The territory hierarchy freezes at 12:00 AM server time on the day of the territory freeze date. Therefore, if you set the territory freeze date to today it's immediately effective.

The primary territory for an opportunity can change due to territory realignment. The forecast item reflects this and other changes made to the opportunity both before and after the territory freeze date, up until the forecast item is locked. When you adjust Forecast items they become individually locked. When you perform a summary level forecast adjustment or submit your forecast your entire forecast is locked.

If the forecast is frozen and the administrator extends the freeze date, then all submitted forecasts are unsubmitted and all the forecasts are no longer frozen.

## Territory Changes

Territory hierarchy changes aren't reflected in the frozen forecast hierarchy. Opportunity changes aren't reflected in locked forecast items.

For forecast items that aren't locked, these changes occur after the freeze date:

- Forecast items are removed from deleted territories, provided both the source and destination territory forecasts aren't submitted.
- When revenues move between territories, the forecast items don't move if either the source or destination territories are submitted.
- If revenues move between existing active territories due to territory definition changes, then forecast items also move.
- If revenues move between existing active territories due to revenue attribute changes, then forecast items also move.
- When revenues move to newly added territories after the forecast hierarchy is frozen, the forecast items don't move to the new territories because the new territories aren't added to the frozen forecast hierarchy.

## How You Manage Forecasts for Others

A sales administrator can take care of everyone's forecast. Also, a territory owner can delegate someone else on the territory team to take care of forecasting actions for her.

If, for example, a senior sales manager wants one person to update forecasts for everyone in her territory hierarchy, then for her territory she adds that person as a member of the territory team and selects the Forecast Delegate check box.

### Finding and Viewing Forecasts

The administrator or delegate can search to find the territory forecast to be updated. You can search for past, current, and future forecasts. You can also save your favorite searches.

You can switch from card view to list view in the Forecasts page to work with multiple forecasts.

### Copying the Prior Forecast

Use the Copy Prior Forecast action to ignore the rolled up opportunity data and copy the numbers from the previously submitted forecast to the current forecast. The prior forecast included forecast items and adjustments, unless it in turn was copied. Your copy takes the total forecast numbers, including adjustments, and pastes them to your current forecast. These numbers overwrite any calculated totals from rolled up opportunity or adjustment data.

## Available Forecast Metrics

Metrics provide calculated measures based on historical or current transactional data. You can refer to metrics when making forecasting decisions.

This table shows the available metrics and how they're calculated:

| Metric                    | Description                                                                                                                                                                                                         |
|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Best Case Forecast        | The sum of all best case revenue values for all forecast items in the forecast period.                                                                                                                              |
| Closed Revenue            | Actual revenue that was closed during the forecast period.                                                                                                                                                          |
| Estimated Adjustment      | The sum of the difference between estimated revenue and revenue for all transactions in the forecast period. Statistical analysis provides the estimated revenue amounts based on historical sales for the product. |
| Expected Forecast         | The sum of all weighted revenue values for all forecast items in the forecast period. Weighted revenue is the revenue amount multiplied by the probability of the deal closing.                                     |
| Likelihood to Buy Product | The percentage of confidence that a deal will close with the specified revenue on the specified close date. Statistical analysis provides the likelihood to buy product based on historical sales for the product.  |

| Metric              | Description                                                                                                                                                                     |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Pipeline            | The total revenue amount of all product lines where the Status category is Open, the primary territory is the target territory, and the close date lies in the forecast period. |
| Quota               | The quota metric is the revenue target associated with the expected performance of a salesperson's territory for a given forecast period.                                       |
| Worst Case Forecast | The sum of all worst case revenue values for all forecast items in the forecast period.                                                                                         |

## Examples of Forecast Period Parameters

You create forecasts by setting and submitting period parameters and forecast criteria. These examples show how the period parameter settings affect the forecasting dates.

### Quarterly Forecast

Your company holds monthly board meetings on the 11th of every month to review sales forecasts for the next quarter. To prepare, you generate monthly forecasts for the next quarter.

On January 1, you configure a recurring monthly forecast with a due date of the 10th of every month by setting the due date to 80 days (21 days of January +28 Days of February +31 days of March) before the first forecast period start date, which is April 1. The end date of the forecast period will be June 30.

- Forecast Period: Quarter
- Frequency: Three
- Adjustment Period: The Fiscal Period as set in the calendar. In this example it's monthly.
- Due Date: 80 days before the first forecast period start date
- Territory Freeze Date: 5 days before the forecast due date
- Number of Concurrent Forecasts: Not set

Edit the individual due date and freeze date for the one quarter when the calculated date doesn't fall on the correct date.

The forecast period parameters produce these dates:

| Parameter             | Q2 January 10 | Q2 February 10 | Q2 March 10 | Q3 April 10 |
|-----------------------|---------------|----------------|-------------|-------------|
| Due Date              | January 10    | February 10    | March 10    | April 10    |
| Territory Freeze Date | January 5     | February 5     | March 5     | April 5     |
| Start Date - End Date | 4/1 to 6/30   | 4/1 to 6/30    | 4/1 to 6/30 | 7/1 to 9/30 |



**Note:** The number of scheduled periods determines how far in advance the forecast schedule extends. If a period is quarterly, and the number of scheduled periods is four, the application generates forecasts up to one year in advance.

## One Concurrent Forecast

You want one active forecast period at a time, with no overlapping dates or gaps.

- Forecast Period: Quarter
- Frequency: Three
- Adjustment Period: The Fiscal Period as set in the calendar. In this example it's monthly.
- Due Date: 31 days after the first forecast period start date
- Territory Freeze Date: 31 days before the forecast due date
- Number of Concurrent Forecasts: One

The forecast period parameters produce these dates:

| Forecast Name      | Start Date | End Date   | Territory Freeze Date | Due Date   |
|--------------------|------------|------------|-----------------------|------------|
| Q3-2018-2018/08/01 | 7/1/2018   | 9/30/2018  | 7/1/2018              | 7/31/2018  |
| Q3-2018-2018/08/31 | 7/1/2018   | 9/30/2018  | 8/1/2018              | 8/31/2018  |
| Q3-2018-2018/08/31 | 7/1/2018   | 9/30/2018  | 9/1/2018              | 9/31/2018  |
| Q4-2018-2018/11/01 | 10/1/2018  | 12/31/2018 | 10/1/2018             | 10/31/2018 |
| Q4-2018-2018/12/01 | 11/1/2018  | 12/31/2018 | 11/1/2018             | 11/31/2018 |
| Q4-2018-2018/12/31 | 12/1/2018  | 12/31/2018 | 12/1/2018             | 12/31/2018 |

## Two Concurrent Forecasts

You want two active forecast periods at a time, with no overlapping dates or gaps.

- Forecast Period: Quarter
- Frequency: Three
- Adjustment Period: The Fiscal Period as set in the calendar. In this example it's monthly.
- Due Date: 60 days before the first forecast period start date
- Territory Freeze Date: 31 days before the forecast due date
- Number of Concurrent Forecasts: Two

The forecast period parameters produce these dates:

| Forecast Name      | Start Date | End Date   | Territory Freeze Date | Due Date   |
|--------------------|------------|------------|-----------------------|------------|
| Q3-2018-2018/08/01 | 7/1/2018   | 9/30/2018  | 7/1/2018              | 7/31/2018  |
| Q4-2018-2018/08/01 | 10/1/2018  | 12/31/2018 | 7/1/2018              | 7/31/2018  |
| Q3-2018-2018/08/31 | 7/1/2018   | 9/30/2018  | 8/1/2018              | 8/31/2018  |
| Q4-2018-2018/08/01 | 10/1/2018  | 12/31/2018 | 8/1/2018              | 8/31/2018  |
| Q3-2018-2018/08/31 | 7/1/2018   | 9/30/2018  | 9/1/2018              | 9/31/2018  |
| Q4-2018-2018/08/01 | 10/1/2018  | 12/31/2018 | 9/1/2018              | 9/31/2018  |
| Q4-2018-2018/11/01 | 10/1/2018  | 12/31/2018 | 10/1/2018             | 10/31/2018 |
| Q1-2019-2018/11/01 | 1/1/2019   | 3/31/2019  | 10/1/2018             | 10/31/2018 |
| Q4-2018-2018/12/01 | 11/1/2018  | 12/31/2018 | 11/1/2018             | 11/31/2018 |
| Q1-2019-2018/11/01 | 1/1/2019   | 3/31/2019  | 11/1/2018             | 11/31/2018 |
| Q4-2018-2018/12/31 | 12/1/2018  | 12/31/2018 | 12/1/2018             | 12/31/2018 |
| Q1-2019-2018/11/01 | 1/1/2019   | 3/31/2019  | 12/1/2018             | 12/31/2018 |

## Forecasting Processes

### Forecast Processes

When you enable forecasting, the Forecast Autopilot process is scheduled to run every hour. Forecast Autopilot schedules the required processes for forecasting and records when each process is run, along with the status. Forecast Autopilot generates these processes and scheduled times:

- Check Due Date

This short process archives forecasts that are now past their due dates and activates the next scheduled forecast. It runs once a day.

- Refresh Forecast

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. This process runs one day before the territory freeze date for each forecast period.

- Refresh Revenue Metrics

This process calculates the pipeline metric and closed revenue metric. It refreshes the pipeline metrics visible to the manager and runs every hour.

- Compress Forecast Metrics

This process reduces space usage and improves performance by compressing calculated metrics. It runs every hour.

If you change the schedules for the processes, then the Forecast Autopilot runs as frequently as the process with the most frequent schedule. Don't run the Generate Forecast process. To run Forecast Autopilot right away:

1. Navigate to Scheduled Processes.
2. Click **Schedule New Process**.
3. Find **Forecast Autopilot**.
4. Click **OK**.
5. In the **Diagnostic Parameters** field, enter `setup_auto_pilot=ON`.

If you want to disable the Forecast Autopilot process, then enter `setup_auto_pilot=OFF`. With Forecast Autopilot disabled, you must schedule each process.

6. Click **Submit**.

## Forecast Synchronization

When a salesperson updates a product item in an opportunity, the forecast is automatically updated to reflect the change.

- New forecast items are created for opportunities that meet forecast criteria.
- Existing forecast items are updated.
- Forecast items that no longer meet forecast criteria are removed.

### Periodic Synchronization

The periodic process Refresh Forecast updates the forecast hierarchy from the territory hierarchy for unfrozen forecasts nightly or as scheduled. When a salesperson's forecast is past due, the periodic synchronization fully updates the next forecast that's now due.

### Update from Opportunity

A salesperson submits a forecast and afterward changes an opportunity. By default, the forecast items aren't synchronized with the opportunity that was changed after forecast submission. The salesperson's manager rejects the forecast to make it available for changes. If the salesperson enables Refresh from Opportunity at the forecast level, then any changes from the opportunity appear immediately in the forecast.

## FAQs for Forecasting

### Frequently Asked Questions (FAQs) for Forecasting

This section contains the most frequently asked questions (FAQs) when setting up and maintaining Forecasting options. Scroll or search to find answers to common questions.

#### What happens when I submit forecast options changes?

When you change forecast period parameters, a process starts that regenerates all future scheduled forecasts. It deletes them and then recreates them.

Forecast period parameters include forecast period, forecast frequency, first forecast due date, territory freeze date, number of concurrent forecasts, and number of scheduled periods.

When you change forecast criteria, a process starts that updates future scheduled forecasts. A change to metrics, the product totals selection, or scheduled forecasts doesn't regenerate the future scheduled forecasts.

If the Forecasting Autopilot process is enabled, then it reevaluates the settings and reschedules the other processes. Forecasting Autopilot runs at the next scheduled time after you submit your changes. If you want to run it before that, you can run a standalone Forecasting Autopilot process using the parameter `setup_auto_pilot=ON`.

#### What's an adjustment period?

The time period for which a salesperson can enter a summary adjustment to the forecast or enter an adjusted forecast is the adjustment period.

The field Period Frequency in Manage Accounting Calendars sets the time periods for viewing forecast amounts and making adjustments. The period frequency is named Fiscal period for the Adjustment Period field in the Select Forecasting Options page.

#### When do I realign territories?

As a best practice, perform major territory realignments when no forecasting activities are open.

Forecasting takes place after the territory freeze date set for the forecast and up to the forecast due date. If all leaf territory forecasts are submitted but the due date hasn't been reached, it's safe to make changes to territories.

## How can I display my own graphs in Forecasting?

Business Intelligence reports provide graphs that you can embed in Forecasting. Add your graph names as lookup meanings in the lookup type Forecast Graph Selector.

For the third lookup value use the lookup code ZSF\_GRAPH3 and so on. Add a new profile option for each graph that provides the path to the graph as the value, and give the profile option the same name as the lookup code for the respective lookup value. See the profile option ZSF\_GRAPH1 Sales Forecasting Graph 1 for an example.

## How can a salesperson adjust forecast items?

The administrator sets the profile option Enable Sales Representative Adjustments to yes.

This option can't be changed back to no in the future. A salesperson who owns a leaf-level revenue territory can then adjust forecast items. Also, a manager who drills down to a salesperson's forecast can act as the salesperson and adjust the salesperson's forecast items.

## What's a forecast criteria override?

If the override is enabled, then salespeople can manually include or exclude a revenue item or forecast item from the sales forecast.

Items that fall within criteria set by the administrator (such as win probability greater than 70 percent) are automatically included in the forecast, unless the salesperson employs the override.



# 32 Quotas

## Overview of Sales Quotas

You set annual quotas for your sales organization from the top down.

Effective top-down planning with bottom-up assessments ensures that quotas relate to corporate goals. After the sales plan is deployed for the year, sales executives can then monitor and track sales performance by comparing forecasts with sales and with quotas.

## Features

Here are some key features:

- Assign territory quotas to territories and resource quotas to people.
- Create sales goals such as number of sales calls.
- Review quotas assigned to you by your senior manager and allocate quotas to your salespeople.
- Compare quota to revenue, pipeline, forecast, and other metrics using business intelligence.
- Use formulas to calculate territory quotas using measurements of historical data and future potential.
- Add adjustments to your quota to cushion against attainment risk.
- Track current quota achievement compared with quota targets.
- Manage seasonal variations in sales by distributing the revenue quota among several calendar periods using seasonality guidance.
- Send notification to Incentive Compensation with new and changed individual quota assignments for all sales goals.
- Use a round trip export, update, import of quotas to add bulk quotas from spreadsheets.

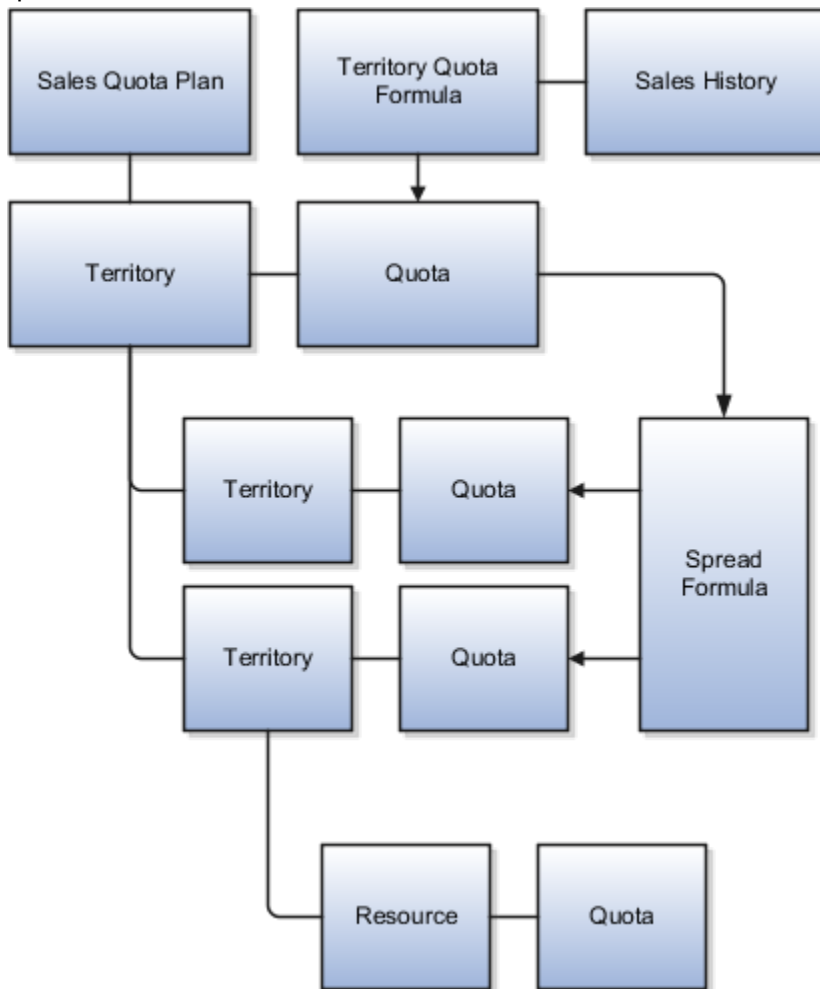
## Quota Components

### Sales Quota Plan Components

Quotas are a reflection of sales targets you set for individuals in your sales organization. You distribute quotas to child territories through the sales territory hierarchy until all territories and their owners have quotas.

This chart shows a sales quota plan with several territories, each assigned a quota. Territory quota formulas compute projected quotas based on historical sales information and metrics such as forecasts and market potential. The projected quotas appear as default territory quota amounts. A spread formula allocates

quota based on the contribution of each of the territories. Individual resources also receive quotas.



## Territories

You can create more than one sales quota plan, each for one year. Active territories become part of the new quota plan, and you can add territory proposals to allow the setting of quotas for proposed territories. The plans are inactive until you activate one for the year. You can designate only one plan to be used for tracking quotas for the year.

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

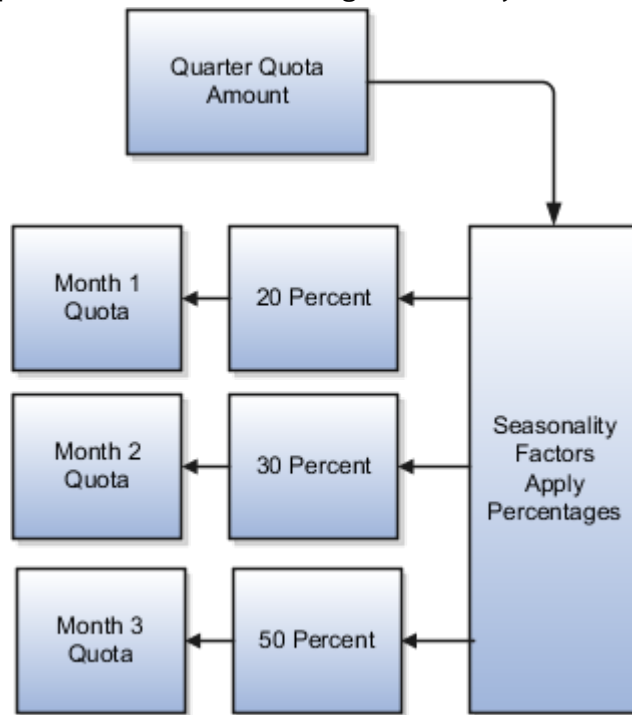
Territories and the resources assigned to them change frequently. You should schedule the Synchronize Quotas process to run daily so that current and future quota plans that are active will use the latest territory hierarchy.

## Plan Options

Setting the available options for the quota plan isn't required. You can select an adjustment threshold, a territory quota formula, and a seasonality factor group to apply to all or to individual territories. Territory options override sales quota plan options. For example, the territory quota formulas and seasonality factor groups selected for individual territories override those set at the quota plan level. You can also set a threshold percentage for adjustment amounts that managers often add to quotas.



This chart illustrates splitting the quarterly quota over each month through seasonality factors that raise or lower quota



amounts according to seasonal fluctuations.

#### Related Topics

- [Territory Quota Formulas](#)
- [What's seasonality?](#)
- [What's a spread formula?](#)
- [Create a Sales Quota Plan](#)

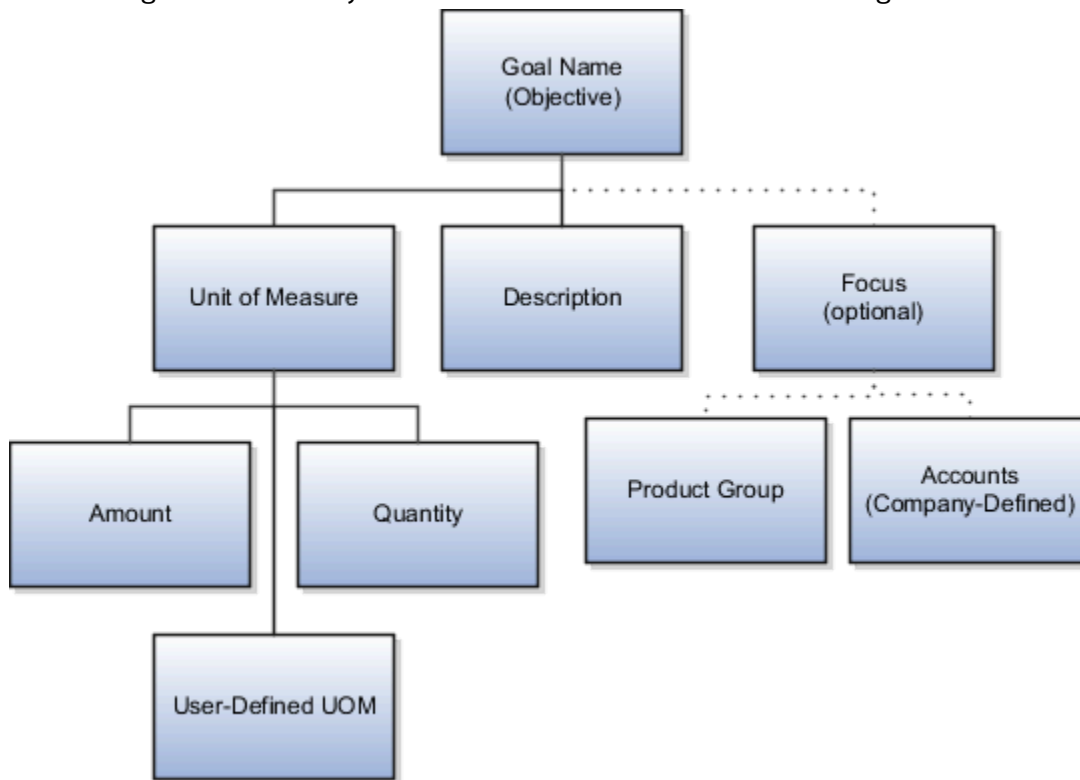
## Sales Goals

A sales goal determines how quota is measured and defines what you want to measure. You set sales goal quotas for a resource, not for a territory. You use Sales Revenue Goals to set salesperson targets for revenue achievement in their respective territories.

Allocating a quota for a sales revenue goal is required, and optionally quotas can be allocated for additional sales goals. Create your own sales goals, such as number of units sold.

This chart shows the components of a sales goal. A sales goal supports a particular objective. You can use any unit of measure for your sales goal and specify what to measure, for example, number of units sold. The provided units of measure choices are amount and quantity, but you can also define your own unit of measure.

Each sales goal contains only one measure. You can also focus the sales goal on one or more product groups.



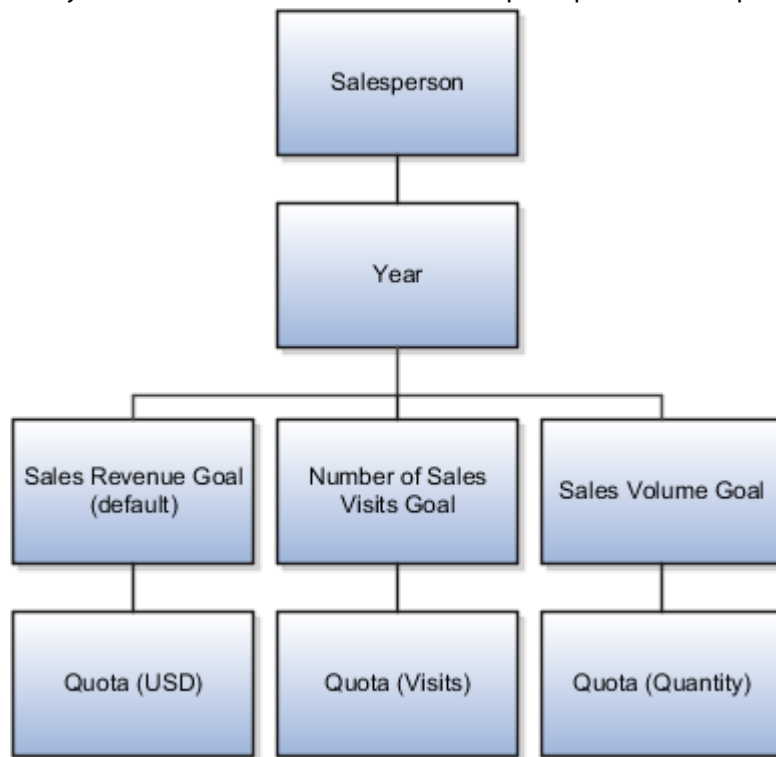
The unit of measure can't be changed after you create the sales goal. The provided Sales Revenue Goal has a unique value for Goal Number: GOAL\_1000. While quotas can be allocated to sales goals which have associated product groups, there are no rollup reports available to compare these quotas against actual sales.

**Note:** Do not make changes to the sales goal object using Application Composer.

## Multiple Quotas for One Resource

You can assign multiple quotas to one or more sales goals for a resource.

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



manager.

A resource can have only one quota per sales goal for the year. You can assign new quotas only for active sales goals. Inactivating a sales goal doesn't affect existing quotas for that sales goal. When you submit notifications to compensation, quotas for all sales goals for the resource are included in the notification.

#### Related Topics

- [How Resource Quotas Work with Incentive Compensation](#)

## Territory Quota Formulas

You can use territory quota formulas as default territory quota amounts in the sales quota plan. They calculate territory quota based on historical sales information and metrics such as forecasts and market potential.

You can change parameters for formulas and set each formula to active or inactive. The formulas execute a Multidimensional Expressions query on the territories Oracle Essbase cube.

## Predefined Formulas

Here are a few of the predefined territory quota formulas with examples:

- *Scale a measure from a past period by a percentage*

Total the amounts for a selected measure for the past selected year. Calculate the stated percentage of the total and add it to the total.

For example, 110 percent of closed bookings for the prior fiscal year.

- *Percentage change in a measure value over 2 consecutive periods*

Subtract the total amounts for a selected measure for one year from the total amounts for the subsequent year. Divide the difference by the total of the first year to determine the percentage of change. Calculate the percentage of the total value of the second year and add the result to the year's total.

For example, closed bookings for 2019 minus closed bookings for 2018 divided by 2018 total gives the rate of change as 8 percent. Calculated quotas are 108 percent of the 2019 closed bookings.

- *Percentage change in a measure value over 2 named time periods (current and past)*

Subtract the total amounts for a selected measure for a selected year from the total amounts for the current year. Divide the difference by the total of the earlier year to determine the percentage of change. Calculate the percentage of the total value of the current year and add the result to the year's total.

For example, closed bookings for 2018 minus closed bookings for 2011 divided by 2011 total gives the rate of change as 7 percent. Calculated quotas are 107 percent of the 2018 closed bookings.

## How To Create Formulas

Use the Essbase MDX Script Editor to create your own territory quota formulas. When you define a formula that includes a metric, use a parameter for the metric name, rather than defining the metric name as part of the formula expression.

For more information about MDX functions and queries, see Oracle Cloud Technical Reference for Oracle Analytics Cloud - Essbase.

## Quota Administration

### Create a Sales Quota Plan

In this example you're the sales administrator and it's a month before the start of the fiscal year. You start the sales quota planning process by creating a new sales quota plan for the coming year.

## Create a Spread Formula

This spread formula calculates the ratio of closed bookings among the child territories, and applies the ratios to the quota amount a sales manager wants to spread among the child territories.

1. In the Setup and Maintenance work area, go to the **Manage Sales Quota Spread Formulas** task:
  - o Offering: Sales
  - o Functional Area: Quotas
2. Click **Add Row** to add a new spread formula.
3. Enter these values:

| Field       | Value                                                                          |
|-------------|--------------------------------------------------------------------------------|
| Name        | Closed Revenue                                                                 |
| Description | Spreads the source based on the ratio of closed revenue for the selected year. |
| Metric      | Closed Revenue                                                                 |

4. Click **Save and Close**.

## Create a Seasonality Group

Create a new group for summer products for the new year.

1. In the Setup and Maintenance work area, go to the **Manage Sales Quota Seasonality Groups** task.
2. Click **Create**.
3. Enter these values:

| Field | Value  |
|-------|--------|
| Name  | Summer |
| Year  | 2021   |

4. Click **OK**.
5. In the **Seasonality Factors** region, enter these factor percentages for time periods:

| Time Period | Factor Percentage |
|-------------|-------------------|
| Quarter 1   | 15                |
| Quarter 2   | 40                |

| Time Period | Factor Percentage |
|-------------|-------------------|
| April       | 5                 |
| May         | 15                |
| June        | 20                |
| Quarter 3   | 35                |
| Quarter 4   | 10                |

6. Click **Save and Close**.

## Create a Quota Plan

1. In the Setup and Maintenance work area, go to the **Manage Sales Quota Plans** task.
2. Click **Create**.
3. Enter the sales quota plan information:

| Field                                    | Value                                                                                                                                                            |
|------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Name</b>                              | Fiscal Year 2021 Sales Plan                                                                                                                                      |
| <b>Description</b>                       | Corporate Sales Quota Plan for Fiscal Year 2021                                                                                                                  |
| <b>Year</b>                              | 2015                                                                                                                                                             |
| <b>Calculate Default Territory Quota</b> | Select. If selected, the application calculates the quotas for each of the territories using the default territory quota formula.                                |
| <b>Track</b>                             | Deselect. Only one plan can track quotas for the year.                                                                                                           |
| <b>Copy Quotas From</b>                  | If quotas have largely remained unchanged from the previous year, then use the Copy Quota Plan option to move quotas from the previous year to the current year. |

Creating a quota plan automatically takes a snapshot of active territories.

4. Click **Save and Close**.

5. In the **Details** region, on the **Options** tab, enter these options:

| Field                    | Value                                                                                                                                                                                |
|--------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Adjustment Threshold     | 10                                                                                                                                                                                   |
| Territory Quota Formulas | Scale a measure from a past period by x percent. Use 5% and select the prior year, 2020.<br><br>Territory quota formulas require territory metrics that are enabled and have values. |
| Seasonality Factor Group | Summer                                                                                                                                                                               |

6. In the **Sales Quota Territory Options** table on the **Options** tab, expand the Global territory and enter the options as shown in the table for the Global Consumer Sales territory.

| Column                   | Value                                                                                                                                                                              |
|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Allow Quota Edit         | Select                                                                                                                                                                             |
| Adjustment Threshold (%) | 8                                                                                                                                                                                  |
| Territory Quota Formulas | x percent growth of a measure over a 3 year simple moving average<br><br><b>a.</b> 3 percent<br><b>b.</b> Prior year 2020<br><b>c.</b> Closed Detail Revenue by Close Date measure |

7. Select **Track** for the quota plan.  
8. Click the **Activate** button and set the activation to right now to test. Upon activation, sales managers can go into the system to begin allocating quotas to their teams.  
9. Click **Save and Close**.

#### Related Topics

- [Territory Quota Formulas](#)
- [What's a spread formula?](#)
- [What happens if I select Calculate Default Territory Quota?](#)
- [Territory Coverage](#)

## Copy Territory Quota to Resource Quota Options

When you copy territory quota to resource quota, period quotas for the territory also get copied to resource period quotas, if enabled. You can also enable copying both territory and period quotas to resource quotas automatically during publishing.

You can set these profile options using the Manage Administrator Profile Options task in the Setup and Maintenance work area. This task is part of the Sales offering in the Sales Foundation functional area.

## Enable Territory Quota Period Copy

When set to yes, you can copy territory quota period amounts to owner resource quota periods. The copy overwrites any existing resource period quotas. The annual resource quota amount must be zero, or the period quotas won't be copied to resource quota periods. Period copy applies to these actions:

- Copy Territory Quota in the Edit Sales Quotas page
- Copy Territory Quota in the Manage Sales Quotas page
- Copy Child Territory Quota in the Manage Sales Quotas page
- Publish territory quota, if the Enable Automatic Territory Quota Copy to Owner Quota on Publish profile option is also enabled

## Enable Automatic Territory Quota Copy to Owner Quota on Publish

When set to yes, territory quota annual values are copied to owner quotas for the sales revenue goal when you publish territory quotas. You can also set the Enable Territory Quota Period Copy to yes. Then the territory quota period amounts are also automatically copied to owner resource quota periods during the publish process.

### Related Topics

- [How You Allocate, Publish, and Revise Quotas](#)

## Schedule Quota Processes

Sales managers or administrators frequently make changes to active territories directly, using territory proposals, or through web services. Schedule synchronization to run frequently to provide the latest structure for allocating quotas.

1. Click **Navigator > Tools > Scheduled Processes**.
2. Click **Schedule New Process**.
3. For the Type field, select **Job**.
4. In the name field list, click **Search**.
5. Search for **Synchronize Quotas**.
6. Select Synchronize Quotas and click **OK**.
7. In the Parameters region of the Process Details page, select the sales quota plan.
8. Click **Advanced**.
9. In the Schedule tab, select **Using a schedule**.
10. Select the **Daily** frequency.
11. Change the start date to when you want to start running the process, and select the time of day when you want it to run.
12. Change the end date to a future date.
13. Use the Notification tab to add notifications to specific people when the process completes.
14. Click **Submit**.



## Quota Validation

You can turn off the quota validation that occurs when sales managers publish quotas. The validation prevents assigning quotas prior to resource start dates (the same as employee hire dates) or territory quota start dates.

If an employee joins the company or a new territory is created midyear, then managers can't assign quotas for all of the year periods with validation turned on. To turn off validation, set the following profile option to no: Allow quota start date validation during publish.

## Add Reports to Sales Quota Pages

You can change Quota UIs so your salespeople have the most useful reports and graphs. Create reports using Answers or Business Intelligence. Add them to the Quota Analytics tab. Salespeople select the report from the list of reports on the tab.

To add a report to your page:

1. Create your Answers or Business Intelligence Publisher reports for quotas.
2. In the Setup and Maintenance work area, use the following:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Standard Lookups
3. Go to the lookup type `ORA_MOT_QM)MSQ_REPORT` for the Manage Sales Quotas page, or `ORA_MOT_QM)ESQ_REPORT` for the Edit Sales Quotas page.
4. Add a new lookup code for each new report to be added on the page. For example, to add a second report to the Manage Sales Quota page, add the lookup code `MOT_QM_MSQ_REPORT2`. To add a report to the Edit Sales Quota page the lookup code would be `MOT_QM_ESQ_REPORT3`. For each additional report to embed in the page, increment the number used in the lookup code.
5. In the **Meaning** field, enter the report name, for example Quotas by Salesperson Report. The name doesn't need to match with the report name in the Business Intelligence catalog.
6. In the **Description** field, enter the report absolute path, for example `/shared/Sales/Analytic Library/Embedded Content/Sales Quota Management/MyBIPReport.xdo`.
  - For Answers reports, find the absolute path in the properties of the report.
  - For BI Publisher reports, click the **Copy Resource** button to find the absolute path to the report.
7. Set the display sequence. This determines the order of the reports shown in the Analytics tab. The report lookup code with the lowest display sequence number determines the report that's displayed by default.

## FAQs for Quota Administration

# Quota Assignment

## How You Allocate, Publish, and Revise Quotas

When you complete assigning quotas to your directs, you publish the quotas to the owners and resources of your child territories. Child territory owners can then view their quotas for the territories they own.

Publishing your quotas also sends notifications containing resource quota information to an incentive compensation analyst. The territory owner and your manager receive notifications that the quotas are published.

### Allocate Quotas

You can allocate quotas in the Manage Sales Quotas page. Sales administrators can enter and edit territory, owner, and team member quotas for any territory quotas that aren't published. Sales managers can enter and edit child quotas that aren't published. For territory quotas that aren't published, you can also:

- Enter or edit a quota for each period
- Apply seasonality factors

Select a parent territory and click Details to use the Edit Sales Quotas page to enter or edit quotas. You can enter annual quotas, period quotas, and apply seasonality to any quotas not published. Assign resource quotas on the Resource Quota tab in the Details region. Besides the owner's resource quota, you can add and assign quotas to other team members.

### Publish Quotas

When you finish allocating your quota, you publish the quotas to make them available to your directs. After publishing, you can't make changes to the quotas.

You can select one or more territories to publish. If you click Publish Child Territories, then the selected territories and their children are published. A sales administrator can publish a hierarchy of territories from the Actions menu. When you publish a territory, you publish the following, and the data becomes available for Business Intelligence:

- Territory quota
- Resource quotas for all sales goals for the selected territory
- Resource quotas assigned to team members
- Quotas assigned to finer time periods

If you didn't apply seasonality to quotas, then the publishing process applies the seasonality factor that was defined in the sales quota plan for the territory. If there are no seasonality factor groups defined, then seasonality factors aren't applied and there is no granular time period quota. Excluded territories can't be published. Publishing fails if the selected territory or any territory resource has no quota.

**Tip:** Save time entering period quotas. Seasonality gets applied automatically when you publish if you haven't manually entered period quotas.

## Copy Territory Quotas to Resource Quotas

By setting two profile options, the administrator enables the automatic copying of quotas during publishing. Publishing does the following:

- Copies the territory owner's annual quota for the sales revenue goal to the owner's resource quota.
- If the owner's annual resource quota is zero, then publishing copies the territory period quotas to resource period quotas. It overwrites any existing resource period quotas.

## Revise Quotas

Before you can revise published quotas, you must change the quota status to Pending Revision. The Revise action changes the status for your selected territory and its children. You can then revise territory quotas, and add, revise, or end date resource quotas. When you complete your revisions you can again publish the quotas and send notifications. The territory quotas change to the Published status and resource quotas change to the Submitted status.

When you revise quotas, the revised values aren't available in Business Intelligence until you republish the revised quotas.

### *Related Topics*

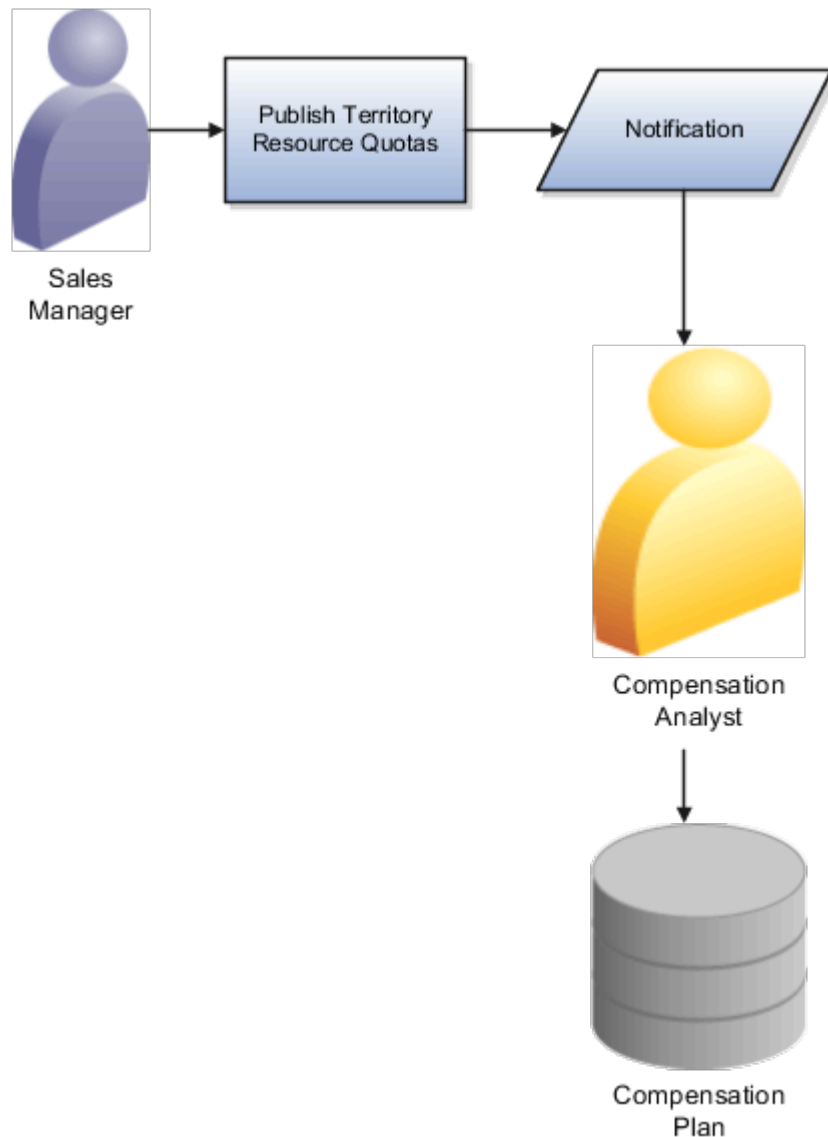
- [Copy Territory Quota to Resource Quota Options](#)

## How Resource Quotas Work with Incentive Compensation

Compensation plans control how an employee is paid. Salespeople often get paid according to their performance.

One tool used to measure performance is the establishment of a sales quota for the salesperson and then the comparison of actual sales for a time period with the salesperson's quota for that time period. The quota manager notifies the compensation analyst any time quota is published or changed.

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



incentive compensation analyst.

## Quota Changes

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

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

## Sales Goals

A sales goal determines how quota is measured and defines what you want to measure. The sales goal used for a territory owner's revenue quotas is the Revenue Sales Goal. In order to assign multiple quotas to an individual

salesperson or to assign quotas to salespeople other than territory owners, you must use a sales goal other than the Revenue Sales Goal. These are examples of sales goal definitions:

- Number of customer visits
- Number of service contracts sold

Notifications to compensation include quotas for each quota-carrying resource for all sales goals. For each salesperson, the notification contains all the annual resource quotas for all applicable goals as well as the period quotas.

## Compensation Plan Updates

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

## Export Quotas to Incentive Compensation

You can export resource quotas and resource period quotas to send to incentive compensation for importing performance goals.

Use Export Management to export the object Sales Resource Period Quota.

### *Related Topics*

- [How do I export data?](#)

## FAQs for Quotas

### Frequently Asked Questions (FAQs) for Quotas

This section contains the most frequently asked questions (FAQs) when setting up and maintaining Quotas. Scroll or search to find answers to common questions.

### What's a spread formula?

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

The formula calculates the ratios to use for the child territories through the use of the metric defined for the selected spread formula. The formula examines each territory contribution of the metric value for a period, and compares it with

the total value of the same metric for all the territories combined, to determine the percentage to apply to each territory. When a spread formula has no metric selected, it distributes the amount evenly across the child territories.

## What happens when a sales quota plan is activated?

When you activate a sales quota plan the status of the plan is changed to completed when the plan year ends. You can't make changes to a completed quota plan.

When you activate a quota plan a process carries out the activation. Another process runs when the quota plan year end date is reached, or if it has passed at the time of activation. The second process changes the status of the sales quota plan to Completed. You can't edit a completed sales quota plan.

## What happens if I select Calculate Default Territory Quota?

Your selection of Calculate Default Territory Quota causes the application to compute the quotas for each of the territories when the sales quota plan is activated. The computations use the formula and parameters you selected to be the default in Manage Territory Quota Formulas.

## What's seasonality?

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

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

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

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

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

Territory quota start date and end date define a period when the sales quota target must be achieved.

The territory quota dates must fall within the start and end dates of the quota plan, and usually match the sales quota plan start and end dates. The resource quota start and end dates define a period when the quota must be achieved by the salesperson, and usually match the sales quota plan start and end dates.

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

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

## Who is a territory administrator?

Sales managers often choose a salesperson or sales operations resource to assist with the quota setting and territory maintenance for the manager's branch of the territory hierarchy.

Select the Administrator check box for a territory team member in your territory. Now that person can view your territory and modify all territories lower in your territory hierarchy. She can also assign sales quotas for you.

You must add the Territory Management Administration Duty to a security job role assigned to the resource in order for the Administrator selection to take effect. A user with the Sales Administrator security role can modify all territories and set all quotas.

## How can I add period quotas prior to the resource start date or territory quota start date?

Your administrator can turn off the date validation that occurs when you publish quotas using the profile option named Allow quota start date validation during publish. The employee hire date is the same as the resource start date.

## How can I publish quotas for a territory hierarchy?

As a sales administrator, you can bulk publish quotas by using the Publish action in the Publish or Revise Hierarchy Quotas process.

Select the sales quota plan and the territory number that's at the top of the hierarchy you want to publish. The process publishes every territory within the hierarchy.

## How can I set quotas to the Pending Revision status for a territory hierarchy?

After sales managers publish quotas, they can't revise them unless the status is changed to Pending Revision. As a sales administrator, you can schedule the Publish or Revise Hierarchy Quotas process, and choose the Revise action.

Select the sales quota plan and the territory number for the top of the hierarchy you want to revise. The process changes the status for every territory within the hierarchy to Pending Revision.

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

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

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

## What's a variance?

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

## What's an adjustment?

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



# 33 Intelligent Advisor

## Overview of Oracle Intelligent Advisor

Oracle Intelligent Advisor helps service agents deliver enriched, personalized, and precise customer service.

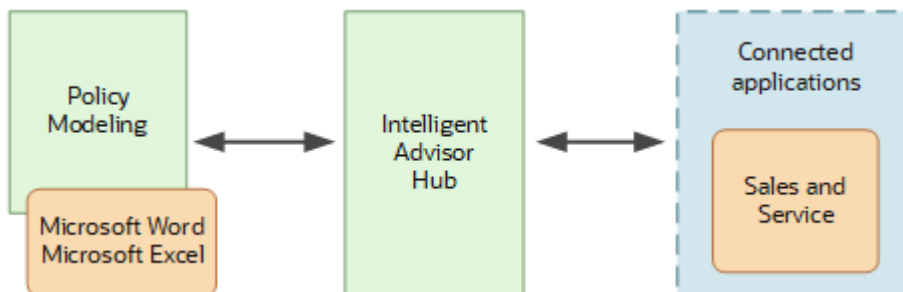
Intelligent Advisor can be connected to Oracle Sales and Oracle Fusion Service for use by agents. Intelligent Advisor interviews can be used for:

- Service requests across a range of industries
- Knowledge streaming by helping agents and contacts identify the most appropriate knowledge article or advice for their needs
- Any multi-page information gathering in Oracle Visual Builder
- Personalized self-service advice with Sales and Service

Using Intelligent Advisor within the Fusion Sales and interface:

- Agents must be logged in to use Intelligent Advisor interviews
- Specific Sales and Service objects can be created and updated

There's desktop modeling software for building interviews called Oracle Policy Modeling. The Intelligent Advisor Hub connects Policy Modeling to Sales and Service.



The steps to integrate Sales and Service with Intelligent Advisor are:

1. Create an Intelligent Advisor Hub.
2. Create a Sales and Service connection in Intelligent Advisor Hub.
3. Download and install Policy Modeling.
4. Create a project in Policy Modeling.
5. Connect the Policy Modeling project to Intelligent Advisor Hub.
6. Map data to and from Sales or Service in Policy Modeling.
7. Deploy and activate the Intelligent Advisor interview.
8. Embed the interview in a Sales and Service agent interface.

## Setup Tasks

### Create an Intelligent Advisor Hub

The first step to integrate Sales and Service with Intelligent Advisor is for an install administrator to create an Intelligent Advisor Hub.

The install administrator will provide the Intelligent Advisor Hub URL. The URL for Intelligent Advisor Hub is in this general format: `https://[server and port]/[deploy-name]/opa-hub/`.

#### *Related Topics*

- [Create and manage sites](#)

### Create a Connection in Intelligent Advisor

The next step is to create the Sales and Service web service connection in the Intelligent Advisor Hub that your team can use for new or existing interviews. This connection enables the two applications to work together and share information.

The installation administrator should have set up access for the Sales Administrator or for a similar role that administers Intelligent Advisor for your organization. Once you sign in, you create a connection to your Sales and Service web services, to get access to data for creating or editing interviews.

#### *Related Topics*

- [Create a connection to Sales and Service](#)

### Download and Install Policy Modeling

Once the connection to the web service is established, the next step is to download and install Policy Modeling.

Policy Modeling is the desktop tool modelers use to create and edit interviews, and to map data from Sales and Service to Intelligent Advisor.

Policy Modeling can be downloaded from Intelligent Advisor Hub.

#### *Related Topics*

- [Install Policy Modeling](#)

## Create a Project in Policy Modeling

After installing Policy Modeling, you need to create a project.

A Policy Modeling project is where modelers write rules and design interviews. Alternatively, to test out an integration, you could use one of the sample projects that comes installed with Policy Modeling.

### *Related Topics*

- [Walkthrough of Policy Modeling](#)
- [Policy Modeling projects](#)
- [Example policy models](#)
- [Design interviews](#)

## Connect the Policy Modeling Project to Intelligent Advisor Hub

The next step is to connect the Policy Modeling project to Intelligent Advisor Hub, which provides access to the Sales and Service data model.

In other words, Intelligent Advisor receives data model information from the Intelligent Advisor Hub which in turn receives the data model information from Sales and Service. This enables Intelligent Advisor to load and save data to Sales and Service.

To connect your Policy Modeling project to Sales and Service via Intelligent Advisor Hub:

1. In Intelligent Advisor, connect the project to Intelligent Advisor Hub.
2. Choose the Sales and Service connection you created previously.

### *Related Topics*

- [Specify the Intelligent Advisor Hub for a project](#)
- [Choose a connector framework web service connection for a project](#)

## Map Data to and from Sales and Service to Policy Modeling

Modelers can then map the data in the policy model Intelligent Advisor project to the appropriate tables/objects and fields in Sales and Service.

Data mapping lets you load data into an Intelligent Advisor interview from Sales and Service, and to save outcomes, including creating new records, from the interview back to Sales and Service.

The input mappings are used to load values, and the output mappings are used for updating and saving values.

### *Related Topics*

- [Oracle Sales and Fusion Service data mapping](#)

## Deploy and Activate the Intelligence Advisor Interview

After you have created your Intelligent Advisor interview, you need to deploy and activate the project for use by Sales and Service.

Take note of the URL of your deployed interview, as you need this to link to the interview from Sales and Service.

### *Related Topics*

- [Deploy a Policy Modeling project](#)
- [Activate a project](#)

## Embed the Interview in a Sales and Service Agent Interface

The final step to get your interview up and running is to add the interview to the agent interface.

Once the project has been deployed and the interview activated, you need to link to the Intelligent Advisor interview from within Sales and Service (from a subtab, button, action menu item, or knowledge article).

### *Related Topics*

- [Add an interview to Fusion Service](#)

## Enable the Saving of Checkpoints and Transcripts

A new Interview object has been added to Sales and Service that automatically saves checkpoint and transcript data.

Transcripts help you maintain historical record of completed sales interviews. Interview transcripts capture a complete, auditable record of all questions, answers and screen text displayed in an interview. They are a useful way to provide a summary of the interview as it occurred, keep a documented record for legal audit requirements, or provide a file that can be scraped for analytics at a later point.

Transcript data is automatically saved in the new Interview object in the InterviewData field.

Checkpoints are points in an interview where it can be saved, resumed and reviewed from. A checkpoint works by saving the progress of the interview, enabling interview users to easily resume an interview that they or someone else left partially completed. Checkpoints also allow completed interviews to be reviewed at any time.

The Intelligent Advisor Interview Object for Checkpoint Enabled (ORA\_ZUP\_IA\_CONNECTOR\_ENABLE\_CHECKPOINT\_INTERVIEW\_OBJECT) profile option controls how the checkpoint data gets stored.

- If this profile option is enabled, the checkpoint data is stored in the predefined interview object.
- If this profile option is disabled, the checkpoint data is stored in the OPACheckpoints\_c custom object. For more information, see [Configure checkpoints for Oracle Sales and Fusion Service](#).

By default, this profile option is disabled.

To view or update the profile value of this profile option:

1. Sign in to Sales or Service as an administrator and navigate to Setup and Maintenance.
2. Click **Navigator > My Enterprise > Setup and Maintenance** work area.
3. Click the Tasks menu and click **Search**. Search for Manage Administrator Profile Values task and open it.
4. Search for the Profile Option, using either:
  - Profile Display Name as Intelligent Advisor Interview Object for Checkpoint Enabled
  - Profile Option Code as ORA\_ZUP\_IA\_CONNECTOR\_ENABLE\_CHECKPOINT\_INTERVIEW\_OBJECT.
5. In the **Profile Values** section in search result, set the profile value to Yes.
6. Click **Save and Close**.



# 34 Slack

## Benefits of Integrating CX Sales with Slack

Slack is a team communication tool that facilitates synchronous communication across different devices.

You can set up the integration of your sales application with Slack, and this helps your company in the following ways:

- A salesperson can view his top five opportunities on Slack by using any device, without having to sign in to your sales application. Only the opportunities that have a close date in the current quarter are considered. He can also take the following actions for each listed opportunity from Slack: log a call, create a task, or schedule a meeting.
- A salesperson can also view the first five leads owned by him in the last three months on Slack. He can also view his first five accounts.
- Notifications can be triggered to Slack users and channels when certain events occur on an object. For example, when an opportunity is closed.

For more information about setting up the integration of Slack with your sales application, see the Oracle CX Service Implementing Fusion Service guide.

### *Related Topics*

- [Use the Slack Channel for Collaboration](#)
- [How You Set Up a Slack Channel for Your Fusion Application: Method 2](#)
- [Define a Groovy Trigger to Send Notifications to Slack](#)





# 35 Analytics and Reports

## Analytics on the Go

Oracle Sales Analytics helps organizations compete more effectively in the marketplace by providing real-time, actionable insight into every sales opportunity at the point of customer contact.

Your sales team can view up to the moment, or historical data in the office, or on the road, on laptop, tablet, or mobile. What are my best opportunities? Where is this deal at in the pipeline? When was the last time I called this company? You get the insights you need right now, right at your fingertips.

Sales teams access analytics right from the home page of a mobile device. Analytics also are embedded contextually for work areas like accounts, contacts, opportunities, activities, leads and so on. The analytics on work areas give users detail on the records they are viewing or updating right on the spot.



## Additional Analytics Resources

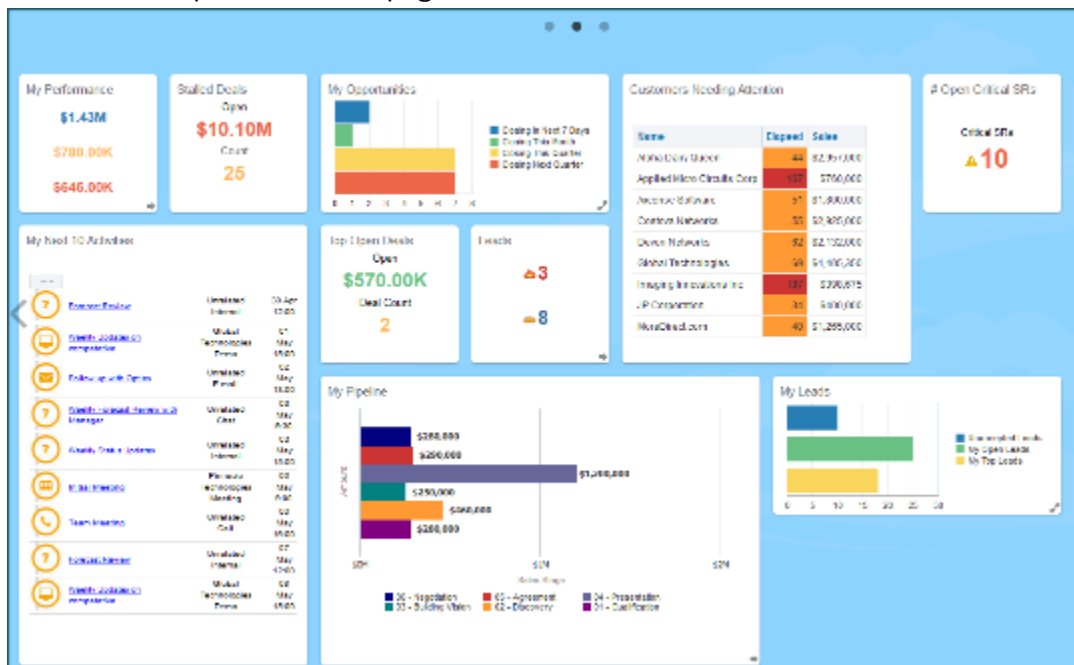
For more information on how to use analytics, see the [Creating and Administering Analytics](#) guide.

## Analytics for Your Sales Teams

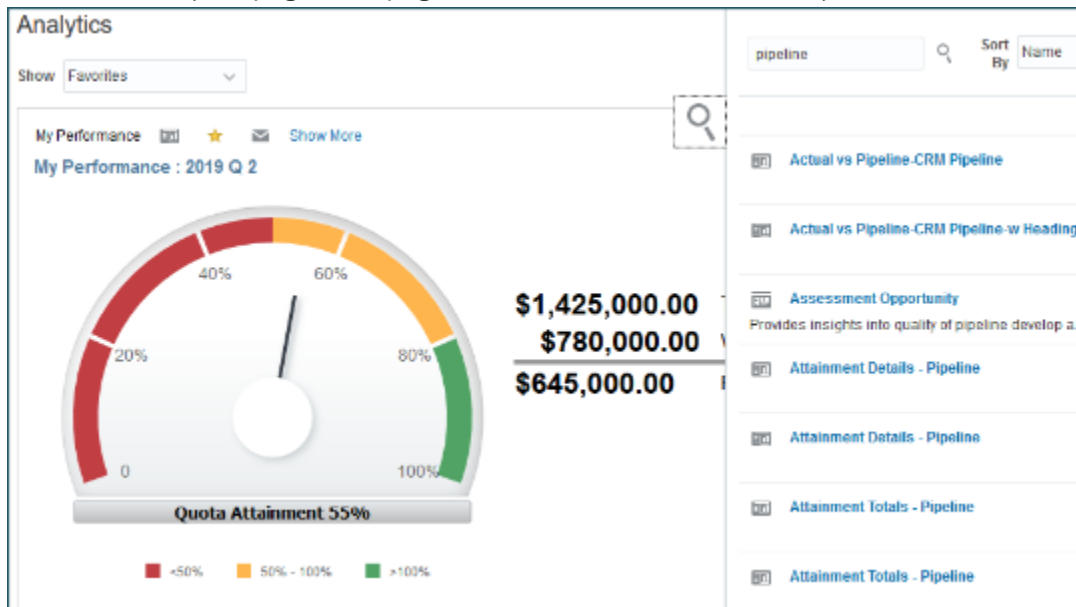
There are many ways to provide analytics for your team. Here are the work areas you can use for analytics.

| Work Area Name                    | Description                                                                                                                                                                                                                      |
|-----------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Oracle Business Intelligence (BI) | You view, edit, and create analytics in BI. You also can view, edit, and create subject areas here.                                                                                                                              |
| Sales Infolet Page                | This page comes prebuilt with infolets specific your user roles. You can do just about anything to change the way this page looks and which analytics show. To get to this page click the white navigation dot on the home page. |
| Sales Pages                       | You enable these pages for your users. These five blank pages are available for you to add analytics related to any area.                                                                                                        |
| Object Pages                      | On these pages sales users work with opportunities, accounts, contacts, activities and so on. Administrators enable the tabs on these pages and add analyses to the tabs on the side or bottom of the page.                      |
| Analytics Page                    | This page is where sales users search for analytics they have permissions to view and can \make them favorites. Sales users also see analytics that administrators create specific to their role.                                |

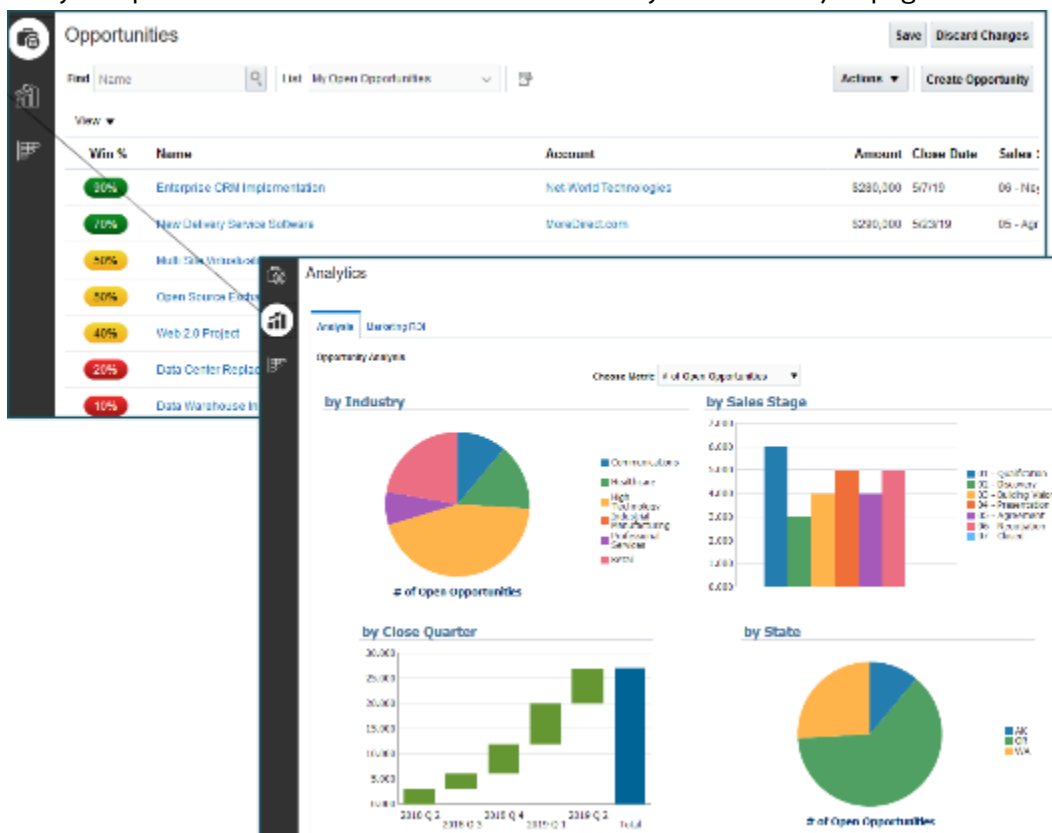
This is an example of an Infolet page.



This is the Analytics page. It's a page where users add and view analytics.



This is the Opportunities work area. Users can click the analytic icon and view analytics specific to a record. Administrators add analytics to this object page.



## Overview of Infolets

An infolet is a small interactive widget that gives you key information and shows you what's going on in the areas you work on. You might also find something in an infolet that you need to follow up on.

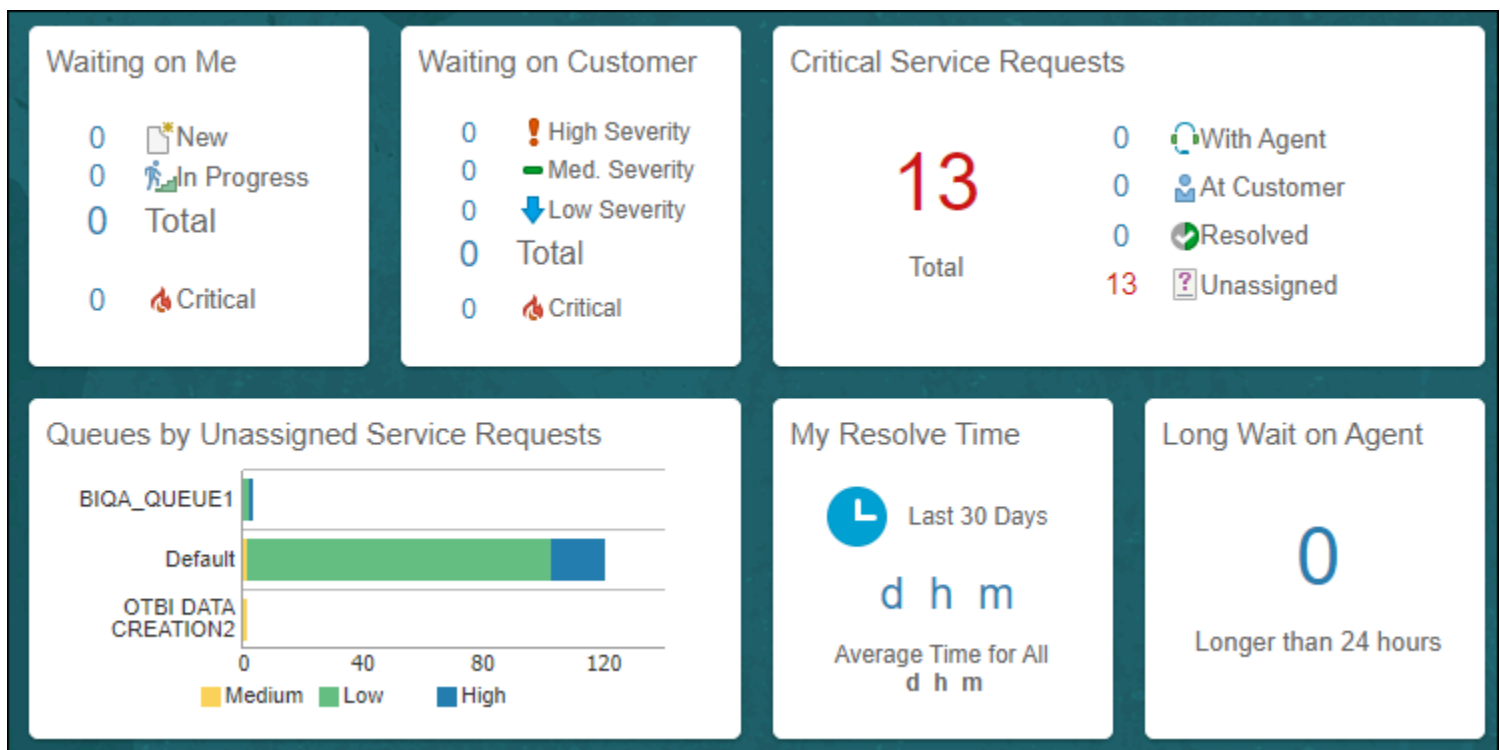
You can use infolets arranged in tabs in the Analytics section of your home page. If you're using a panel or banner layout, use the page control icons to use the infolets.

Here are a few things to know about infolets.

- Infolets have a front view, and might have a back and expanded view. Use the **Back View**, **Front View**, and **Expanded View** icons at the bottom corners of an infolet to open these views.
- Your current infolet view persists as the default view the next time you sign in. For example, if you viewed a back view of the infolet in your last session, you will see the same infolet view by default in your next session.
- Some infolets might also contain links to detailed reports. You can click anywhere in the infolet area to drill down to the detailed report.
- You can also personalize the infolets. For example, you can move or hide them on the infolets page.
- If you don't see infolet pages on your home page, then your administrators must have disabled them to show on the home page.

**Note:** Some SCM or Procurement Cloud infolets might function differently from other infolets.

Here's how an infolet page looks.



# Configure Visualizations for CX Sales Mobile

The Visualization Configuration tool allows an administrator to build configurations using the analytics stored in the BI catalog. These configurations can then be viewed in your sales team mobile applications.

## Access the Visualization Configuration Tool

An administrator should have either of the following roles assigned to access the visualization configuration tool.

- `ORA_ZCA_CUSTOMER_RELATIONSHIP_MANAGEMENT_APPLICATION_ADMINISTRATOR_JOB` (Customer Relationship Management Administrator)
- `ORA_ZBS_SALES_ADMINISTRATOR_JOB` (Sales Administrator)

## How to Navigate to the Visualization Configuration Tool

1. From Navigator choose Configuration.
2. Choose Application Composer.
3. Choose Visualization Configuration. If you don't see a visualization configuration option, verify your role has permissions to configure visualizations.

## View a Visualization Configuration

On the visualization configuration page, you see a list of all the configurations, including predefined configurations. If you click on the visualization reference number you can see details.

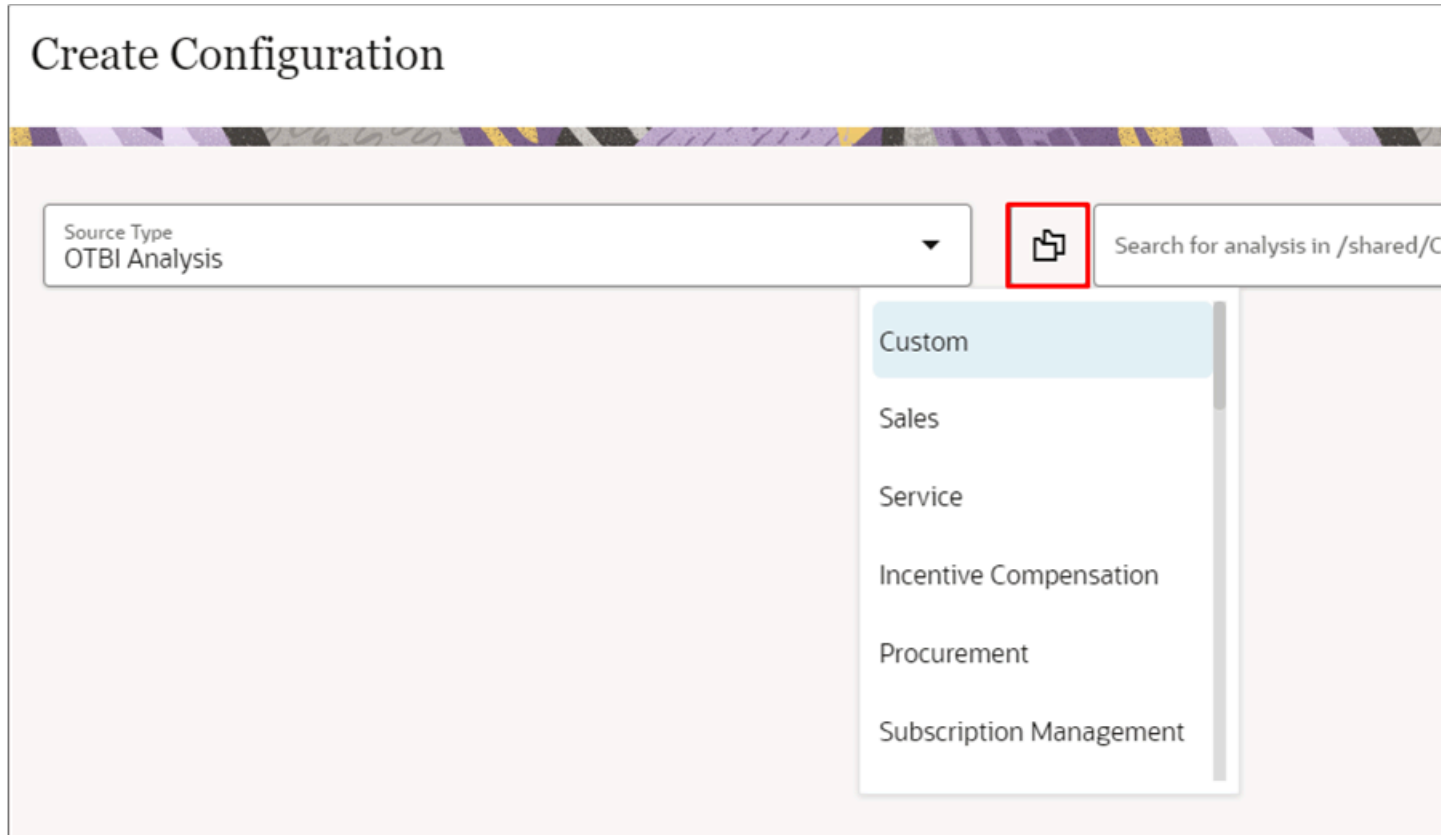
**Note:** Visualizations for predefined configurations might show a warning message that the source doesn't return data, if an administrator doesn't have transactional data that they own logged in their account. This could also be validated in the source analysis results.

## Create a Visualization Configuration

**Note:** If you want to create a configuration using a predefined or seeded BI Analysis, you should select the Catalog folder as Sales and then search for the source analysis.

1. Click **Add** to create a new configuration. The Create Configuration page displays the source type and source.
2. To create a configuration based upon BI Analysis, select OTBI Analysis as Source Type.

3. Select a folder by clicking on the Select Catalog folder icon where you have saved the OTBI Analysis. By default, the Custom folder is selected.



The screenshot shows the 'Create Configuration' interface. At the top, there's a header 'Create Configuration'. Below it, there's a 'Source Type' dropdown menu currently set to 'OTBI Analysis'. To the right of this dropdown is a 'Select Catalog' icon (a folder icon) which is highlighted with a red rectangular box. Below the 'Select Catalog' icon, a dropdown menu is open, displaying a list of catalog folders: 'Custom' (which is highlighted in light blue), 'Sales', 'Service', 'Incentive Compensation', 'Procurement', and 'Subscription Management'. To the right of the 'Select Catalog' icon and its dropdown, there is a search bar with the placeholder text 'Search for analysis in /shared/C'.

4. In the Source field, enter your search criteria. You're searching the BI catalog for an existing analysis under the selected catalog folder in BI.
5. Select a source analysis from the search results to create your visualization. All the fields get auto-selected and visualization shows on the right side upon selection. If the selected source analysis has more columns than required to create the visualization, there could be a warning message on the Create Configuration page as the visualization may not show correct data. To resolve the issue, remove the columns from the analysis that are not used for creating the visualization and reload the configuration.

Administrators can further change the configuration settings as needed. Change the status from Draft to Active to use the configuration in the mobile dashboard.

6. Click Create to save the configuration.

**Create Configuration**

Source Type: OTBI Analysis

Source Activity: Activity

Name: Activity

Status: Draft

Visualization Type: Bar Chart

**Details**

X Axis: Activity Function Name

Y Axis: # of Activities

Categorized By:

Orientation: ☒ Vertical ☐ Horizontal

Stacked Layout: ☐

7. Once your visualization is created, you can add it to a page layout in your CX Sales mobile applications.

For details on configuring page layouts see, [Configure the Reports Page Layouts](#).

## Import and Export Visualization Configurations

Follow the below links to Import and Export Visualization Configuration .

Object: Visualization Configuration

Sample Script:

- To export specific configuration: ReportConfigNumber = 'CDRM\_1002'
- To export all the configurations: ReportConfigNumber IS NOT NULL

Export Data: <https://docs.oracle.com/en/cloud/saas/sales/22a/faiem/export-data.html#s20067824>

Import Data: <https://docs.oracle.com/en/cloud/saas/sales/22a/faiem/import-data.html#s20058837>

Round-Trip Export-Import: <https://docs.oracle.com/en/cloud/saas/sales/22a/faiem/round-trip-feature.html#s20070990>

*Related Topics*

- [Configure the Reports Page Layouts](#)



# 36 Application Change Auditing

## Overview of Auditing in Oracle Applications

### Audit Policies

Auditing is used to monitor user activity and all configuration, security, and data changes that have been made to an application. Auditing involves recording and retrieving information pertaining to the creation, modification, and removal of business objects.

All actions performed on the business objects and the modified values are also recorded. The audit information is stored without any intervention of the user or any explicit user action.

Use audit policies to select specific business objects and attributes to be audited. The decision to create policies usually depends on the type of information to be audited and to the level of detail required for reporting.

### Enabling Audit Functionality

For Oracle Applications Cloud, you must configure the business objects and select the attributes before enabling audit. If you enable audit without configuring the business objects, auditing remains inactive. By default, auditing is disabled for all applications. To enable and manage audit, ensure that you have a role with the assigned privilege Manage Audit Policies (FND\_MANAGE\_AUDIT\_POLICIES\_PRIV). For appropriate assignment of roles and privileges, check with your security administrator.

To enable auditing for Oracle Fusion Middleware products, select one of the levels at which auditing is required for that product. The audit levels are predefined and contain the metadata and events to be audited. For more information, see [Audit Events for Oracle Applications Cloud Middleware \(Doc ID 2114143.1\)](#) on My Oracle Support.

If you don't want an application to be audited, you can stop the audit process by setting the Audit Level option to **None**. Also, note that there's no specified retention period for the audited data or the logs. Follow your company policy for retaining or removing such data.

**Note:** You won't be able to enable audit if you're working in a sandbox. If you try to set up audit while you're in a sandbox, you will see the message "Audit setup is disabled in a sandbox". You'll also notice that the buttons associated with the audit functionality are disabled.

#### Related Topics

- [Audit Configuration for Business Object Attributes](#)
- [Overview of Audit Configuration](#)

## Overview of Audit Configuration

To set up auditing for Oracle Applications Cloud, select the Manage Audit Policies task from the Setup and Maintenance work area within your offering.

To set up auditing for Oracle Fusion Middleware products, select the level of auditing mapped to a predefined set of metadata and the events that have to be audited. Information about configuring audit for Oracle Fusion Middleware products is provided in Oracle Fusion Middleware guides.

You can also create a configuration file and deploy it to audit a specific Oracle Fusion Middleware product. The configuration details for Oracle Fusion Middleware products are available as audit-specific assets that you can use to create the **config.xml** configuration file. To get a list of audit-specific assets, see [Audit Events for Oracle Applications Cloud Middleware \(Doc ID 2114143.1\)](#) on My Oracle Support.

## Oracle Fusion Middleware Products

- Configure business objects to enable auditing in Oracle Fusion Middleware products. Refer to Oracle Applications Cloud Common Features Reference.

See: [Auditing Web Services](#)

## Oracle Fusion Security Products

- Configure business objects to enable auditing in Oracle Fusion security products. Refer to Oracle Applications Cloud Common Features Reference.

See: [Introduction to Oracle Fusion Middleware Audit Framework](#)

See: [Managing Audit](#)

## Audit Reports

You can use the Audit Reports work area to view changes to the application data, such as the business objects that were created, updated, and deleted.

To view the history or to create a report, you must have a role with the View Audit History (FND\_VIEW\_AUDIT\_HISTORY\_PRIV) privilege assigned to it. For appropriate assignment of roles and privileges, check with your security administrator.

## Audit Events

Transactional events in the application trigger the audit process based on the create, update, and delete operations. For events to trigger the audit process for the business objects, you must first enable the objects for auditing.

These are the events that trigger the audit process.

| Transactional Event | When the Audit Activity is Triggered                                | Audit Report Content                                                                                                                                      |
|---------------------|---------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------|
| Create              | Whenever business object data is created and stored in the database | <ul style="list-style-type: none"><li>• Name of the created object</li><li>• Name of the user who created the object</li><li>• Time of creation</li></ul> |
| Update              | Whenever the existing business object data is updated               | <ul style="list-style-type: none"><li>• Both old and updated values of the object</li><li>• Name of the user who updated the object</li></ul>             |

| Transactional Event | When the Audit Activity is Triggered                                    | Audit Report Content                                                                                                                                |
|---------------------|-------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------|
|                     |                                                                         | <ul style="list-style-type: none"><li>Time of updating</li></ul>                                                                                    |
| Delete              | Whenever the existing business object data is removed from the database | <ul style="list-style-type: none"><li>The last value that the object attributes contained</li><li>Name of the user who deleted the object</li></ul> |

The event details are stored in the audit table. The attributes of the audited object data can be used in lookups and foreign keys to display values in the audit history. The application supports displaying the audited information according to the language settings configured.

For Oracle Fusion Middleware products, events such as failed sign-in attempts are used as triggers. In absence of an audit table, the information is stored in the sandbox and presented only in English.

**Note:** This topic focuses on the create, update, and delete event types available in Fusion Applications. For details on events used in the Oracle Fusion Middleware products, refer to the Oracle Fusion Middleware documentation. See: [Introduction to Oracle Fusion Middleware Audit Framework](#)

#### Related Topics

- [View Audit Reports](#)

## Audit Configuration for Business Object Attributes

Audit enables tracking the change history of particular attributes of a business object. However, those objects and their attributes must be selected for audit and auditing must be enabled for that application.

The configuration settings determine which attributes to audit for a given object, and when the audit starts and ends. Auditing takes into account all the operations performed on an object and its attributes, such as create, update, and delete. To configure audit business object attributes, use the **Manage Audit Policies** task in the Setup and Maintenance work area.

### Selecting an Application

To set up auditing, you must select a web application that contains the required business objects that can be audited. From the list of business objects, select those business objects that you want to audit. Selecting a business object also displays its attributes that are enabled for auditing.

### Selecting Attributes

For each selected business object to be audited, select the corresponding attributes to include in the audit. All attributes that belong to that object are by default selected for audit and appear on the user interface. However, you can add or remove attributes from the list. When you remove an attribute from the list, you stop auditing it even when the parent object is selected for audit. So, if you want an attribute to be audited, you must add it to the list. If the object selected in an audit hierarchy is also a part of several other audit hierarchies, the attribute configuration for that object is applicable to all the hierarchies in that application.

For business objects based on flexfields, select the Flexfields (Additional Attributes) check box to view, add, or remove flexfield attributes. The selected objects are audited.

**Note:** You can't audit LOB (BLOB, CLOB, and NCLOB), rich text, and long text attributes.

## Starting and Stopping Audit

The business object is ready for audit after you select its attributes and save the configuration changes. However, to start auditing, the audit level for Oracle Applications Cloud must be set to **Auditing** on the Manage Audit Policies page.

To stop auditing an object, you can deselect the entire object and save the configuration. As a result, all its selected attributes are automatically deselected and aren't audited. To continue to audit the business object with select attributes, deselect those attributes that aren't to be audited. When users view the audit history for an application, they can specify the period for which they want the results. Therefore, make a note of when you start and stop auditing an application.

For example, users intend to view the audit history of an object for the previous week, but auditing for that object was stopped last month. They wouldn't get any audit results for that week, because during the entire month that object wasn't audited. Even if you enable audit for that object today, users can't get the wanted results because audit data until today isn't available.

**Note:** When users export the report summary to a Microsoft Excel file, there's a limit on the number of rows that are displayed in the file.

- For Oracle Fusion Middleware products, the maximum limit is 25000. By default, the limit is set as 10000. You can change this limit using the FND\_AUDIT\_FMW\_EVENT\_LIMIT profile option.
- For Oracle Fusion Application Business Objects, the maximum limit is 10000 per table. This is set as the default value. Sometimes, the actual rows returned might be more than the limit set, because a single transaction can update multiple tables. To decrease this limit, you can create the FND\_AUDIT\_EXPORT\_ENTITY\_LIMIT profile option and set a lesser value for it.

See *Why is it taking so long to get search results when exporting audit summary of Fusion Application Business Objects?*

# Sales Applications Auditing

## Use Auditing to Monitor Sales Application Changes

You use auditing to monitor user activity and all configuration, security, and data changes that have been made to your applications. You enable specific business objects so that you can audit, record, and retrieve information about when the objects were created, modified, and removed.

As an administrator, you access the audit history pages from the **Navigator > Tools** menu.

**Note:** Administrators must have the Manage Sales Audit Policies (FND\_VIEW\_SALES\_AUDIT\_HISTORY\_PRIV) privilege to view audit reports.

Here are the sales business objects you can audit:

| Area                           | Parent Objects            | Child Objects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|--------------------------------|---------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Account and Contact Management | Account (Account Profile) | <ul style="list-style-type: none"> <li>• Sales Account Profile</li> <li>○ Sales Account Resource</li> <li>○ Sales Account Territory</li> <li>• Address</li> <li>○ Address Purpose</li> <li>• Phone</li> <li>• Email</li> <li>• Instant Messaging</li> <li>• Web</li> <li>• Classification Assignment</li> <li>• Additional Account Name</li> <li>• Contact Preference</li> <li>• Usage Assignment</li> <li>• Additional Identifier</li> <li>• Source System References</li> <li>• Relationship</li> <li>○ Customer Contact Profile</li> </ul> |
| Account and Contact Management | Contact (Person Profile)  | <ul style="list-style-type: none"> <li>• Sales Account Profile</li> <li>○ Sales Account Resource</li> <li>○ Sales Account Territory</li> <li>• Contact Address</li> <li>○ Address Purpose</li> <li>• Phone</li> <li>• Email</li> <li>• Instant Messaging</li> <li>• Web</li> <li>• Classification Assignment</li> <li>• Additional Contact Name</li> <li>• Contact Preference</li> <li>• Usage Assignment</li> <li>• Additional Identifier</li> <li>• Source System References</li> </ul>                                                     |

| Area                           | Parent Objects                | Child Objects                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|--------------------------------|-------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                |                               | <ul style="list-style-type: none"> <li>Relationship</li> <li>Customer Contact Profile</li> </ul>                                                                                                                                                                                                                                                                                                                                                                            |
| Account and Contact Management | Household (Household Profile) | <ul style="list-style-type: none"> <li>Sales Account Profile</li> <li>Sales Account Resource</li> <li>Sales Account Territory</li> <li>Address</li> <li>Address Purpose</li> <li>Phone</li> <li>Email</li> <li>Instant Messaging</li> <li>Web</li> <li>Classification Assignment</li> <li>Additional Household Name</li> <li>Contact Preference</li> <li>Usage Assignment</li> <li>Additional Identifier</li> <li>Source System References</li> <li>Relationship</li> </ul> |
| Account and Contact Management | Resource (Resource Profile)   | <ul style="list-style-type: none"> <li>Address</li> <li>Address Purpose</li> <li>Location SDO</li> <li>Phone</li> <li>Email</li> <li>Instant Messaging</li> <li>Web Page</li> <li>Resource Organization Membership</li> <li>Resource Role Assignment</li> <li>Sales Representative Setup</li> </ul>                                                                                                                                                                         |
| Common Components              | Activity                      | <ul style="list-style-type: none"> <li>Contacts</li> <li>Resources</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                               |
| Contracts                      | Contract header               | <ul style="list-style-type: none"> <li>Buy Contract Line</li> <li>Project Contract Line</li> <li>Sales Contract Line</li> <li>Service Contract Line</li> </ul>                                                                                                                                                                                                                                                                                                              |

| Area                | Parent Objects | Child Objects                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|---------------------|----------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Opportunities       | Opportunity    | <ul style="list-style-type: none"> <li>• Opportunity Revenue</li> <li>• Opportunity Split Revenue</li> <li>• Opportunity Recurring Revenue</li> <li>• Opportunity Revenue Line Set</li> <li>• Opportunity Team Member</li> <li>• Opportunity Partner</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Opportunity Revenue | Opportunity    | <ul style="list-style-type: none"> <li>• Forecast</li> <li>• Worst Case</li> <li>• Estimated Price</li> <li>• Product</li> <li>• Quantity</li> <li>• Discount</li> <li>• Amount</li> <li>• Line Currency</li> <li>• Revenue Type</li> <li>• TypeCodeSetId</li> <li>• Best Case</li> <li>• Win Probability</li> <li>• UOM</li> <li>• Product Group</li> <li>• Frequency</li> <li>• End By</li> <li>• End After</li> <li>• Recurring Quantity</li> <li>• Recurring Estimated</li> <li>• Recurring Revenue</li> <li>• Start Date</li> <li>• Status</li> <li>• StatusCodeSetId</li> <li>• Close Date</li> <li>• Win/Loss Reason</li> <li>• CloseReasonClodeSetId</li> <li>• Competitor</li> <li>• Include in Forecast</li> <li>• Recurring Worst Case</li> <li>• Recurring Best Case</li> <li>• Sales Channel</li> <li>• Partner</li> </ul> |

| Area                            | Parent Objects       | Child Objects                                                                                                                                                                                                                                                                                                                                                                          |
|---------------------------------|----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                 |                      | <ul style="list-style-type: none"> <li>Recurring Expected Revenue</li> <li>Additional Text 1</li> <li>Additional Text 2</li> <li>Additional Number 1</li> <li>Additional Amount 1</li> <li>Recurring Additional Number 1</li> <li>Recurring Additional Amount 1</li> </ul>                                                                                                             |
| Marketing                       | Leads                | <ul style="list-style-type: none"> <li>Leads Product</li> <li>Leads Resources</li> <li>Leads Contacts</li> <li>Leads Territories</li> </ul>                                                                                                                                                                                                                                            |
| Marketing                       | Budget               | <ul style="list-style-type: none"> <li>Budget Entries</li> <li>Fund Requests</li> </ul>                                                                                                                                                                                                                                                                                                |
| Partner Relationship Management | Partner              | <ul style="list-style-type: none"> <li>Classification Assignment</li> <li>Partner Type</li> <li>Customer Contact Profile</li> <li>Partner Certification</li> <li>Expertise</li> <li>Geographies Served</li> <li>Industries Served</li> <li>Product Specialties</li> <li>Account Team</li> <li>Address</li> <li>Phone</li> <li>Web</li> <li>Email</li> <li>Instant Messaging</li> </ul> |
| Partner Relationship Management | Partner Program      | <ul style="list-style-type: none"> <li>Program Benefit Details</li> <li>Program Objective Details</li> <li>Program Contract Templates</li> </ul>                                                                                                                                                                                                                                       |
| Partner Relationship Management | Partner Enrollment   | <ul style="list-style-type: none"> <li>Enrollment Participants</li> <li>Contract Enrollments</li> </ul>                                                                                                                                                                                                                                                                                |
| Sales Catalog                   | Product Group header | <ul style="list-style-type: none"> <li>Product Group</li> <li>Product Group Product</li> <li>Eligibility Rules</li> </ul>                                                                                                                                                                                                                                                              |



| Area                 | Parent Objects           | Child Objects                                                                                                                                                                                                                                  |
|----------------------|--------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                      |                          | <ul style="list-style-type: none"><li>Product Group Relation</li><li>Product Group Attachments</li></ul>                                                                                                                                       |
| Sales Catalog        | Product header           | <ul style="list-style-type: none"><li>Product</li><li>Product Attachment</li></ul>                                                                                                                                                             |
| Territory Management | Sales Territory          | <ul style="list-style-type: none"><li>Sales Territory Resource</li><li>Sales Territory Line of Business</li><li>Sales Territory Coverage</li><li>Sales Territory Coverage Dimension</li><li>Sales Territory Coverage Dimension Value</li></ul> |
| Territory Management | Sales Territory Proposal | Sales Territory Proposal                                                                                                                                                                                                                       |

**Note:** You can also audit custom objects that you create in Application Composer. On the Configure Business Object Attributes page, select **CRM Application Composer** from the Product list of values. You can then select either a top-level custom object or its child objects, or an intersection object that was created from a many-to-many relationship.

#### Related Topics

- [Audit Policies](#)
- [Audit Reports](#)

## Enable Auditing of Sales Business Objects

Enable audit history so that your users can see the change history of sales business objects.

**Note:** Administrators must have the Manage Sales Audit Policies (FND\_MANAGE\_SALES\_AUDIT\_POLICIES\_PRIV) privilege to do these steps.

1. Sign in as a setup user.
2. In the Setup and Maintenance area, use the search pane to search for the Manage Audit Policies task.
3. In the Manage Audit Policies page, click **Configure Business Object Attributes** in the **Oracle Fusion Applications** region.
4. Select appropriate business object or business object area from the list.
  - For sales Accounts, Business Plans, Objects, or Quotes, select **CRM Common**.
  - For sales Activities, select **Applications Common Components**.
  - For Products and Product Groups, select **Sales Catalog**.
  - For Opportunities, select **Sales**.
5. If necessary, select a child item from the list of objects in the Audit Name table.
6. Click the add icon in the Audited Attributes area.
7. Select the fields you want to audit.

## 8. Click **Save and Close**.

# Display the Change History Subtab

Salespeople can see a record's change history without having to leave the record, provided that you make the Change History subtab visible. You can display the Change History subtab for both standard and company-defined objects.

Before you display this subtab, be sure to configure your audit policies using the Manage Audit Policies task in Setup and Maintenance. See the related topics for more information.

You can expose the Change History subtab for these objects:

- Accounts
- Contacts
- Opportunities
- Leads
- Activities
- Deal Registration
- Company-defined objects

The steps to display the Change History subtab are the same for all objects: you create a new page layout and add the subtab. Here's a procedure with the Account object as an example.

To make the Change History subtab visible:

1. In an active sandbox, click **Navigator > Configuration > Application Composer**.
2. In the navigation tree, select, expand **Standard Objects > Account**, and click **Pages**.
3. Ensure that the **Application Pages** tab is selected.
4. Create a new custom layout for the details page, or edit an existing custom layout.
5. On the Details Layout page for the custom layout, click the **Add** icon in the Subtabs Region. The add icon is the last subtab in the list of subtabs.
6. Click the **Common component** radio button.

**Note:** If both the Notes and Change History subtabs are already enabled, then you can't select the Common component check box.

7. Click **Next**.
8. Select the **Change History** option.

If you can't select a check box, then that common component is already allowed for use in this custom layout.

9. Click **Save and Close**.
10. Test the changes: Navigate to **Sales > Accounts** as a salesperson. Edit an account and ensure you can see the Change History subtab in the Edit Account page.
11. Publish the sandbox.

**Tip:** The filters on the Change History page aren't extensible. You can't hide them or configure what they display. For more information on their behavior, see the Audit History topic in this chapter.

## Grant Salespeople Privileges to View the Change History Subtab

If you have a company-defined object and you want your salespeople to be able to view the Change History subtab for that object, you need to configure that security.

Here's how to grant salespeople the privilege to view the audit history in the Change History subtab, for company-defined objects.

**Note:** You can also do these steps from the Role Security link in the Common Setup region.

1. In Application Composer, go to the company-defined object and open its **Security** node.
2. On the Define Policies page, in the Roles section, click the **Change History** check box for the Custom Objects Administration role.

## FAQs for Change Auditing

### Frequently Asked Questions (FAQs) for Change Auditing

This section contains some frequently asked questions (FAQs) when setting up application change auditing. Scroll or search to find answers to common questions.

#### Can I display the Change History subtab for custom objects?

Yes, you can display the Change History tab on the pages of custom objects. Simply add the Change History subtab to the details page of the object.

#### Can I audit and view changes in custom fields on standards objects?

Yes. You can add custom fields to the list of attributes available for audit.

#### Can I modify the search-related fields on the Change History subtab?

No, you can't modify the search fields. You can't hide them or configure what they display.

#### Can I audit the history of attachments?

No. The application doesn't support auditing attachments.

#### Does the audit begin only after the Change History subtab is visible?

Yes. The Change History subtab presents the audit information in the context of the record only if audit has been allowed for the object.

## How is the performance on the Change History subtab?

The Change History subtab is faster than the central or fundamental audit reports because only a single record's history is audited at one time. However, it takes more time than the normal clicks to complete a business action on the UI.

If you find poor performance when auditing, try enabling the functionality for a single or only a few objects.

# 37 Cross-Origin Resource Sharing

## Overview of Cross-Origin Resource Sharing

Cross-Origin Resource Sharing (CORS) is a mechanism that allows cross-domain communication and lets a browser securely access resources from a different domain.

By default, browser-based programming languages, such as JavaScript, can access resources only from the same domain. But with CORS, you can overcome this limitation and manage resources across domains.

Here are the CORS headers you can configure to make that possible.

| CORS Header                      | Purpose                                                                                                           |
|----------------------------------|-------------------------------------------------------------------------------------------------------------------|
| Access-Control-Allow-Origin      | Contains a comma-separated list of trusted origins, or domains, that a client application can get resources from. |
| Access-Control-Max-Age           | Specifies how long to store the results of a request in the preflight result cache.                               |
| Access-Control-Allow-Methods     | Contains a comma-separated list of HTTP methods allowed in a request.                                             |
| Access-Control-Allow-Headers     | Contains a comma-separated list of HTTP headers allowed in a request.                                             |
| Access-Control-Allow-Credentials | Specifies whether a client application can send user credentials with a request.                                  |

### Example

A client application retrieves resource X from server A, which is what the application runs on. The client application then makes an HTTP request to get resource Y from server B. For this cross-server request to work, you must configure the `Access-Control-Allow-Origin` header in server B. Otherwise, the request fails and we end up with an error message.

#### Related Topics

- [Configure CORS Headers](#)
- [Set Profile Option Values](#)

## Configure CORS Headers

To enable CORS in Oracle Applications Cloud, configure CORS headers so that client applications in one domain can use HTTP requests to get resources from another domain. Set values for profile options that correspond to the CORS headers.

To view the profile option, go to the Setup and Maintenance work area and use the Manage Applications Core Administrator Profile Values task in the Application Extensions functional area.

## CORS Profile Options

This table lists the profile options you can set for CORS headers.

| CORS Header                  | Profile Option Name (Profile Option Code)                              | Profile Option Values                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------|------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Access-Control-Allow-Origin  | Allowed Origins for Cross-Origin Resource Sharing (ORA_CORS_ORIGINS)   | <p>These are the values you can enter to indicate which origins are allowed:</p> <ul style="list-style-type: none"><li>URL of the specific origin. For example, <b>http://www.exampledomain.com</b>.</li><li>Space-separated list of origins. For example, <b>http://www.exampledomain.com http://us.example.com http://software.example.com</b></li></ul> <p><b>CAUTION:</b> Asterisk (*) is no longer supported as a valid value to allow access to resources from all origins. If you have already set asterisk (*) as the value for the allowed origins, make sure to replace it with the allowed origins.</p> <p><b>Note:</b> These are some key points to remember while using the profile values:</p> <ul style="list-style-type: none"><li>You must set a value for this header to enable CORS.</li><li>Never enclose URL and asterisk in quotation marks.</li><li>Domain names must contain only valid URL characters.</li><li>The profile value is applicable at the Site level.</li></ul> |
| Access-Control-Max-Age       | CORS: Access-Control-Max-Age (CORS_ACCESS_CONTROL_MAX_AGE)             | Default value for caching preflight request is 3600 seconds.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Access-Control-Allow-Methods | CORS: Access-Control-Allow-Methods (CORS_ACCESS_CONTROL_ALLOW_METHODS) | Default values for allowed methods are <b>OPTIONS, HEAD, GET, POST, PUT, PATCH,</b> and <b>DELETE</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Access-Control-Allow-Headers | CORS: Access-Control-Allow-Headers (CORS_ACCESS_CONTROL_ALLOW_HEADERS) | Default values for allowed headers are <b>Accept, Accept-Encoding, Authorization, Cache-</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

| CORS Header                      | Profile Option Name (Profile Option Code)                                      | Profile Option Values                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----------------------------------|--------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                  |                                                                                | Control, Content-Encoding, Content-MD5, Content-Type, Effective-Of, If-Match, If-None-Match, Metadata-Context, Origin, Prefer, REST-Framework-Version, REST-Pretty-Print, Upsert-Mode, User-Agent, X-HTTP-Method-Override, and X-Requested-By.                                                                                                                                                                                                                                    |
| Access-Control-Allow-Credentials | CORS: Access-Control-Allow-Credentials (CORS_ACCESS_CONTROL_ALLOW_CREDENTIALS) | <p>Select <b>True</b> or <b>False</b> to allow or prevent sending user credentials with the request. The default is False.</p> <p><b>CAUTION:</b> Don't set the value to True without assessing the risk. The value shouldn't be set to True if the value for ORA_CORS_ORIGINS is set to asterisk (*). The Access-Control-Allow-Credentials header won't be set if ORA_CORS_ORIGINS value is *. Setting the value to True affects all the Fusion Applications REST endpoints.</p> |

- Related Topics
- CORS
  - Set Profile Option Values





# 38 Microsoft 365

## About Integrating the Outlook Add-in with Oracle Sales

Oracle currently supports two versions of the Microsoft Outlook add-in. It's highly recommended that you use the latest version – the Microsoft 365 add-in for Oracle Sales Redwood User Experience (hereafter called Microsoft 365 for Redwood UX) which consists of the next-generation Microsoft Outlook add-in and sync capabilities.

**Note:** If you're migrating the CX Sales for Microsoft 365 integration to the Oracle Sales Redwood UX for Microsoft 365 integration, there are specific steps for the migration. See [Migration Overview](#) for more information. For more information about setup steps, start with the [How do I implement Microsoft 365 for Oracle Sales Redwood UX?](#) playbook on [Oracle Help Center > Sales > Playbooks page](#).

## Overview of Microsoft 365 for Sales

Your sales organization can use the integration between CX Sales and Microsoft 365 to access sales application data from within Microsoft 365 and apps that use Microsoft Exchange.

**Note:** This chapter describes the previous version of the Microsoft Outlook add-in. Oracle recommends that you use the Redwood User Experience version of the Microsoft Outlook add in. Start with the [How do I implement Microsoft 365 for Oracle Sales Redwood UX?](#) playbook on [Oracle Help Center > Sales > Playbooks page](#).



Watch video

The integration includes an add-in that opens as a side-panel in Microsoft Outlook. This means that when composing emails and creating meetings, the sales organization can access sales data directly in Outlook.

Here's how the sales organization benefits from the integration:

- Salespeople can capture interactions with customers, including emails and meetings, in CX Sales. This allows the sales organization to remain informed on the latest status of customer engagement, including various communications, ongoing meetings, and meeting outcomes.
- Salespeople can perform their sales-related work without having to leave Outlook -- often their most frequently used application.
- Because the integration synchronizes sales data with Microsoft Exchange, salespeople can see their sales appointments on their native phone apps and other applications integrated with Microsoft Exchange.

### Related Topics

- [Home Page](#)

## Setup Steps

### Overview of Microsoft 365 Integration Setup

This chapter provides you with the basics on how to set up the integration with Microsoft 365. You learn how to register and enable the Oracle add-in to Outlook and how to run the processes that sync data in Oracle Sales with Microsoft Exchange.

**Note:** Oracle recommends that you use the Redwood User Experience version of the Microsoft Outlook add in. See the *How do I implement Microsoft 365 for Oracle Sales Redwood UX?* playbook for more information.

| Step | Description                                                                                                                                                                                                                                                                                                                | Where to Get More Details                                                 |
|------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|
| 1    | Make sure your software meets the prerequisite requirements.<br><br>If you're using the Microsoft Edge browser, ensure that the browser includes the following trusted sites: <ul style="list-style-type: none"><li>https://*.office.com</li><li>The Oracle Sales domain: for example: https://*.oraclecloud.com</li></ul> | <i>What are the system requirements for Microsoft integration?</i>        |
| 2    | Complete the integration steps in Microsoft Azure, Sales, and in Microsoft 365, and enable data synchronization.                                                                                                                                                                                                           | See the topic: <i>Enable Microsoft 365 Integration</i>                    |
| 3    | Set synchronization and other options.                                                                                                                                                                                                                                                                                     | See the topic: <i>Manage Microsoft 365</i>                                |
| 4    | Schedule the three synchronization processes in CX Sales.                                                                                                                                                                                                                                                                  | See the topic: <i>Synchronize Data Between CX Sales and Microsoft 365</i> |
| 5    | Sign in to Microsoft 365 and open Outlook to test the integration and add-in.                                                                                                                                                                                                                                              | See the topic: <i>Open the Add-In from Outlook for the First Time</i>     |

**Note:** For information on extending the Microsoft-Sales integration for Outlook, start with *Overview of Extending Microsoft 365 for Sales*. For user information, see *Sign In to Outlook for the First Time*.

### Enable Microsoft 365 Integration

Enabling the integration between Oracle Sales and Microsoft 365 accomplishes two things:

**Note:** Oracle recommends that you use the Redwood User Experience version of the Microsoft Outlook add in. See the *How do I implement Microsoft 365 for Oracle Sales Redwood UX?* playbook for more information.

- Allows users to access the Outlook add-in in the side panel
- Sets up background processes that keeps information between Sales and Outlook consistent

You need two users to complete the setup:

- A setup user in Sales
- An administrator user for the Microsoft Azure and Microsoft 365 portals.

Enabling the integration involves these steps:

1. Register the add-in in Microsoft Azure.

During the setup, you copy the generated application ID and application key.

2. In Sales, you enter the application ID and application key and generate a manifest file. You also enable data synchronization.
3. In the Microsoft 365 portal, you upload the manifest file and deploy the add-in.

### User Agreement

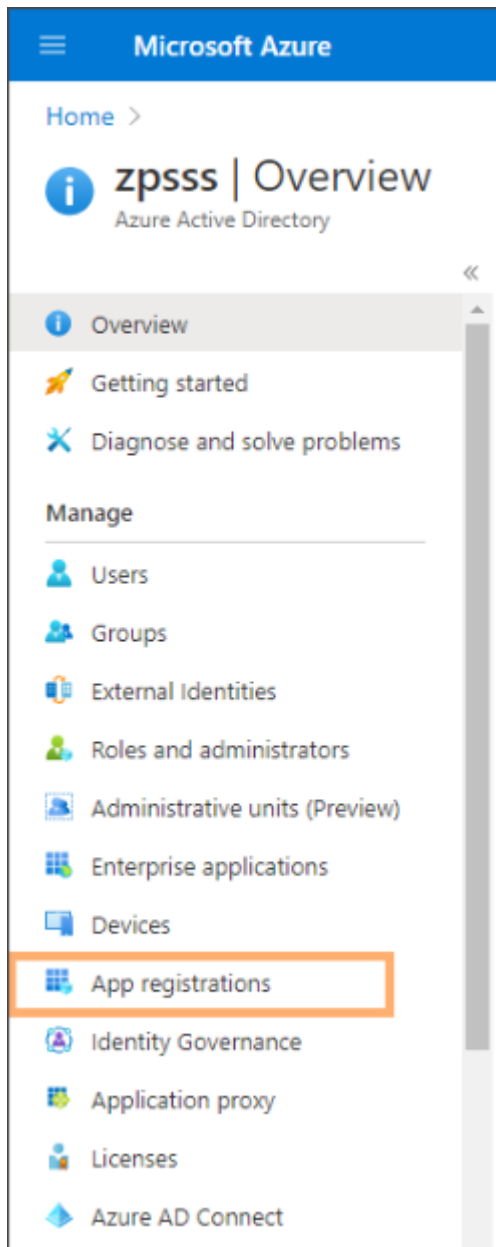
This Oracle-Microsoft integration or plug-in may enable you to link to or transmit your content or third-party content to, or otherwise access, or retrieve content from, Microsoft and its platforms, users, or services. Oracle doesn't control and isn't responsible for Microsoft sites or platforms or services, the performance or availability of the services, or any content received or sent. You bear any and all risks associated with access to and use of Microsoft sites, platforms, and services and are solely responsible for entering into and compliance with separate terms between you and Microsoft. Oracle isn't responsible for the security, protection or confidentiality of such content (including obligations in the Hosting and Delivery Policies and Data Processing Agreement and Oracle's Privacy Policy) that's transmitted to such Microsoft sites or platforms or services. You're solely responsible for obtaining or having any required consents or other legal basis for your use of this integration or plug-in. Oracle reserves the rights to terminate your connection or integration if your use of this integration or plug-in violates the terms of your Agreement(s) with Oracle.

## Register the Oracle Add-In in Microsoft Azure

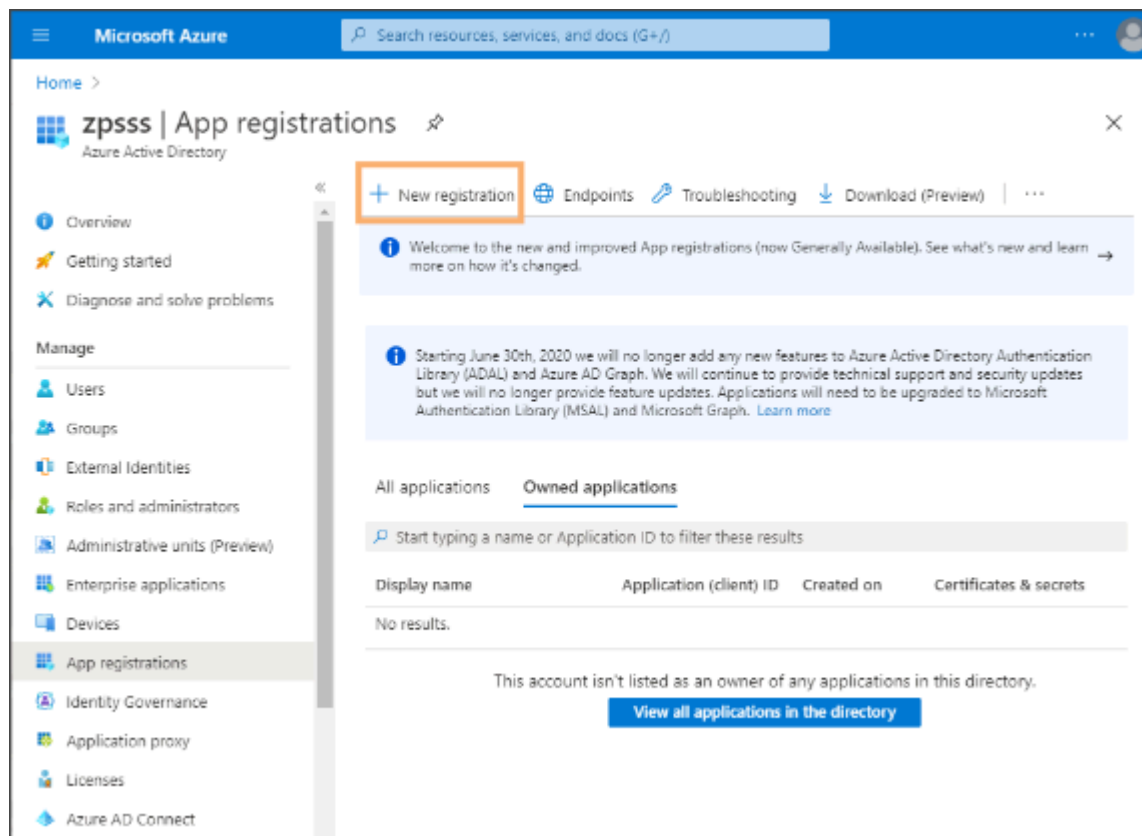
1. As an Azure/Exchange administrator, sign in to the Microsoft Azure portal at <https://portal.microsoft.com/Adminportal/Home#/Settings/IntegratedApps>.
2. Under Azure Services, click **Azure Active Directory**.

**Note:** If you're a first-time user, then you must sign up for your Microsoft Azure Active Directory account.

3. In the left pane of the Azure Active Directory Overview page, click **App registrations**.



#### 4. Click **New Registration**.



5. On the **Register an application** page, make these entries:

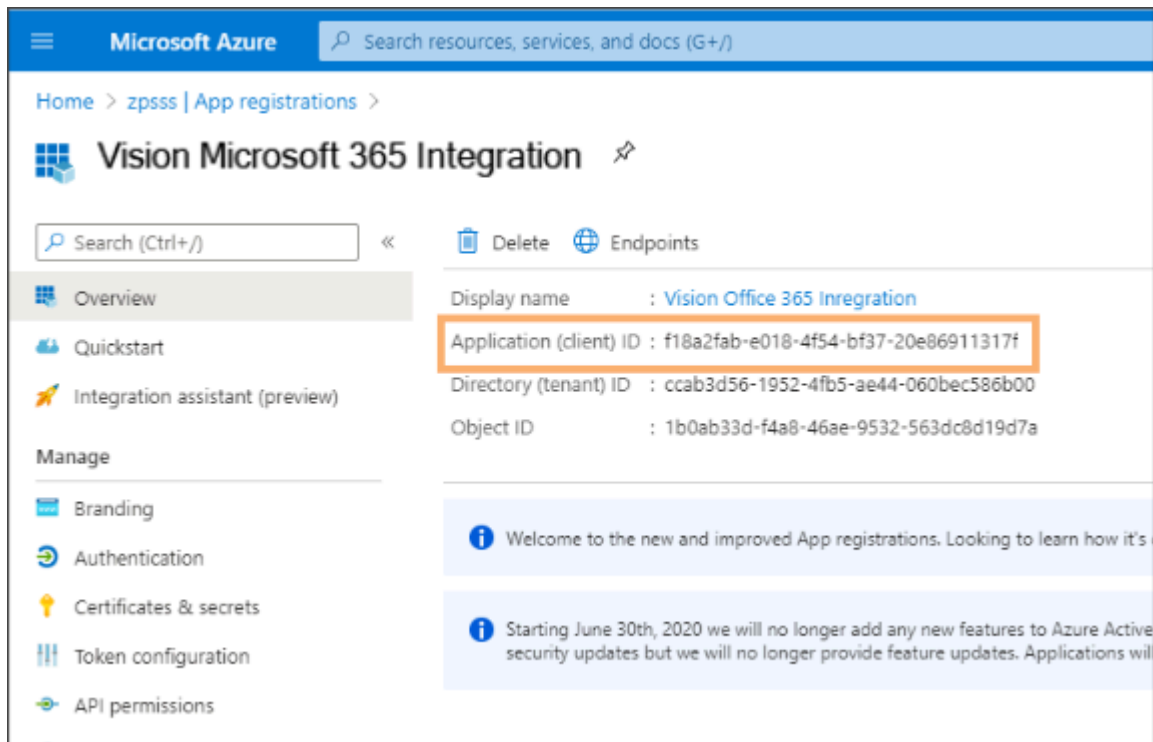
- a. Enter a name for the application (in this example, **Vision Microsoft 365 Integration**). The name you enter appears during Azure setup only. It doesn't appear in the add-in.
- b. For **Supported account types**, make sure **Accounts in this organizational directory only (single tenant)** is selected.

**Note:** If you want to use a multitenant setup, select the multi-tenant option.

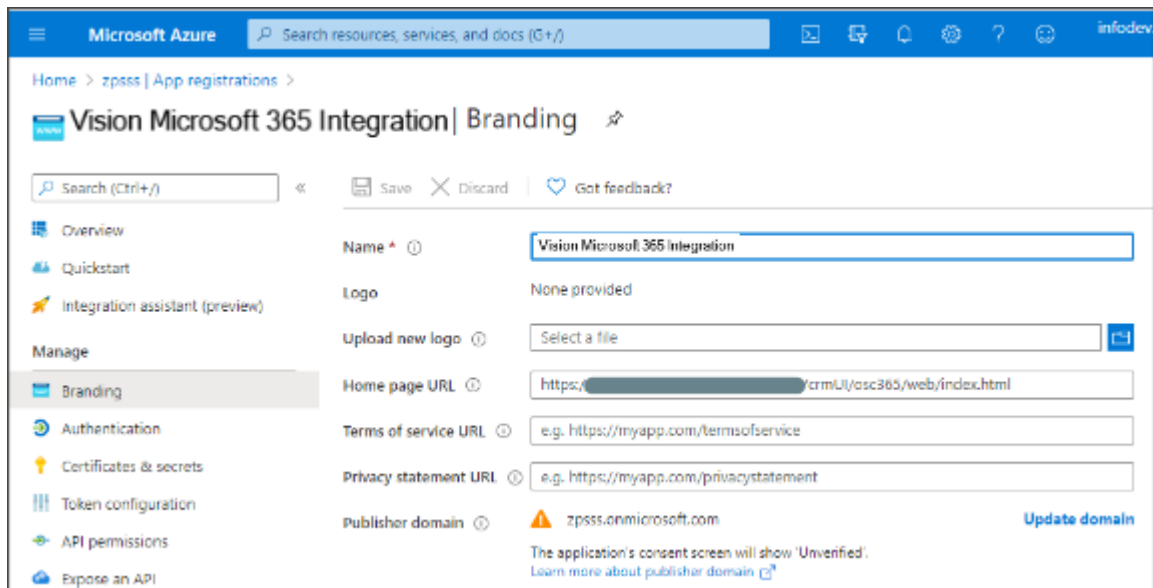
- c. Leave the **Redirect URI** blank.
- d. Click **Register**.

The screenshot shows the 'Register an application' page in the Microsoft Azure portal. The page has a blue header with the 'Microsoft Azure' logo and a search bar. Below the header, the breadcrumb 'Home > zpsss | App registrations >' is visible. The main heading is 'Register an application'. There is a required field for 'Name' with a red asterisk. Below it, a description states: 'The user-facing display name for this application (this can be changed later)'. The input field is empty. Under the 'Supported account types' section, the question 'Who can use this application or access this API?' is followed by three radio button options. The first option, 'Accounts in this organizational directory only (zpsss only - Single tenant)', is selected. The other two options are 'Accounts in any organizational directory (Any Azure AD directory - Multitenant)' and 'Accounts in any organizational directory (Any Azure AD directory - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)'. A link 'Help me choose...' is provided. Below this, the 'Redirect URI (optional)' section explains that the URI is used for the authentication response and that a value is required for most scenarios. The input field for the URI is empty, with a dropdown menu set to 'Web'. At the bottom, there is a checkbox for 'By proceeding, you agree to the Microsoft Platform Policies' and a blue 'Register' button.

- On the App registrations overview page with the name of your application, copy the **Application (client) ID** for later use.

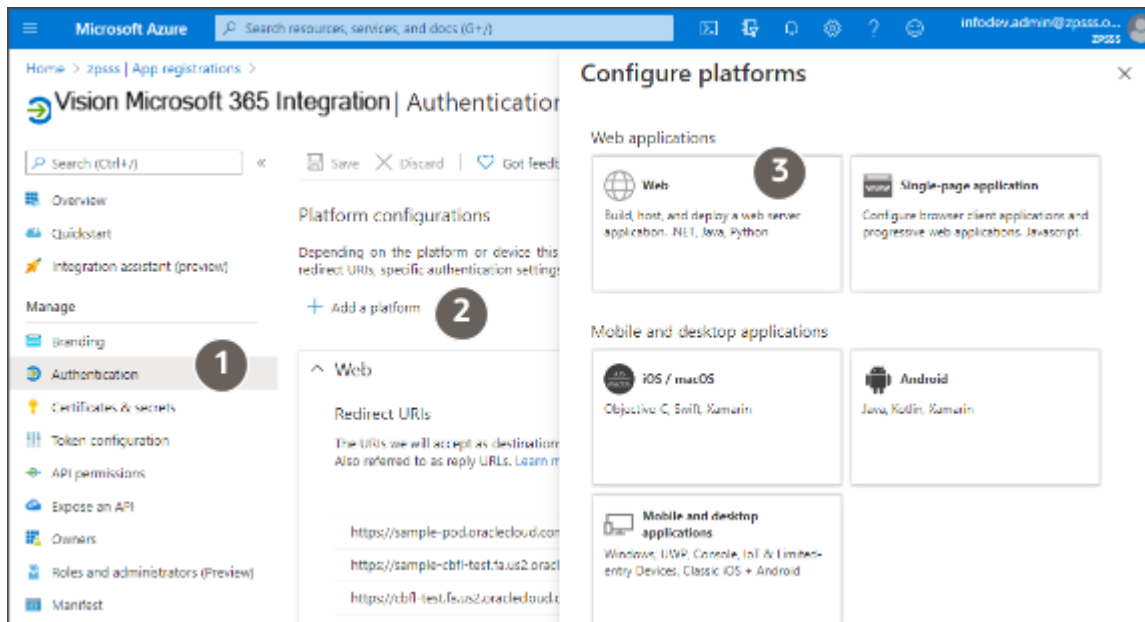


- In the left-hand pane, under the Manage heading, click **Branding & properties**.



- In the **Home page URL**, enter the host name of your sales environment with an additional string appended to it: `https://<Host Name>/crmUI/osc365/web/index.html`
- Click **Save**.

10. In the left-pane of the page, under the Manage heading, click **Authentication** (callout 1 in the following screenshot) and make these entries:



- a. Click **Add a Platform** (callout 2).
- b. In the **Configure platforms** page, click **Web** (callout 3).
- c. Add the following URIs in the **Redirect URIs** section.
  - `https://<host>/sales/office365/jet/close.html`  
For example: `https://sample-pod.oraclecloud.com/sales/office365/jet/close.html`
  - `https://<host>/crmUI/office365/jet/close.html`  
For example: `https://sample-pod.oraclecloud.com/crmUI/office365/jet/close.html`
  - `https://<host>/crmUI/osc365/web/close.html`  
For example: `https://sample-pod.oraclecloud.com/crmUI/osc365/web/close.html`

You must add each URI separately:

- i. In the **Configure Web** window, enter the first URI in the **Redirect URIs** field (callout 1 in the screenshot).



## Configure Web

[All platforms](#)
[Quickstart](#)
[Docs](#)

### Redirect URIs

The URIs that we will accept as destinations when returning authentication responses (tokens) after successfully authenticating users. Also referred to as reply URLs. [Learn more about Redirect URIs and their restrictions](#)

✓

### Logout URL

This is where we send a request to have the application clear the user's session data. This is required for single sign-out to work correctly.

### Implicit grant

Allows an application to request a token directly from the authorization endpoint. Checking Access tokens and ID tokens is recommended only if the application has a single-page architecture (SPA), has no back-end components, does not use the latest version of MSAL.js with auth code flow, or it invokes a web API via JavaScript. ID Token is needed for ASP.NET Core Web Apps. [Learn more about the implicit grant flow](#)

To enable the implicit grant flow, select the tokens you would like to be issued by the authorization endpoint:

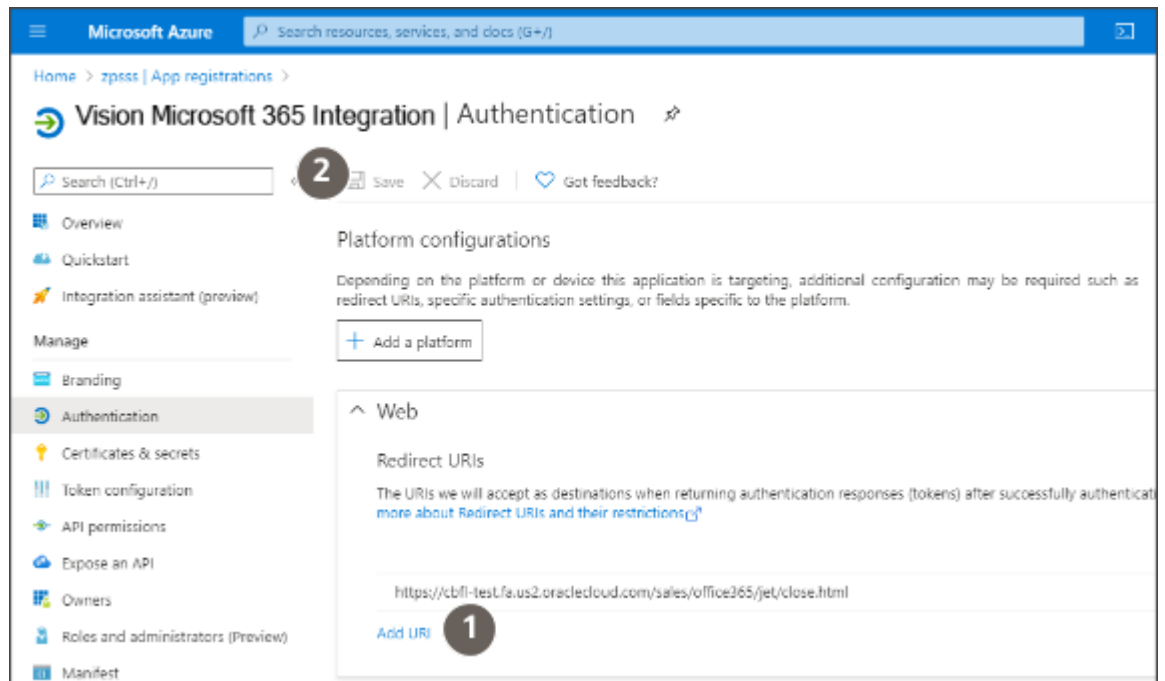
☐ Access tokens
   
☐ ID tokens

2

Configure

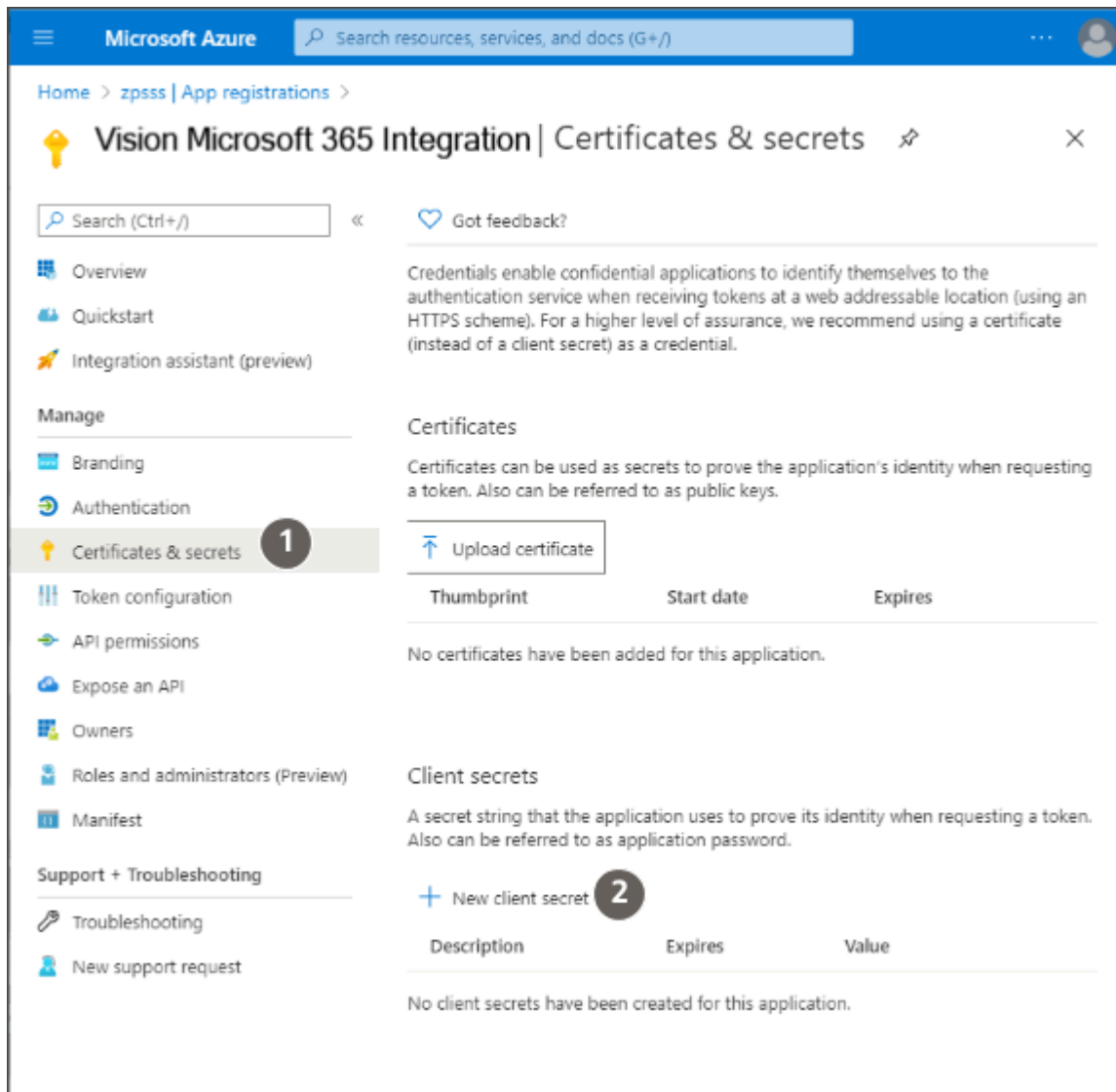
Cancel

- ii. Click **Configure** (callout 2).
- iii. In the Authentication page, Web section (following screenshot), Click **Add URI** (callout 1) to add each of the other two URIs.



- d. Click **Save** (callout 2) at the top of the page.

11. In the left-pane, click **Certificates & secrets** (callout 1 in the following screenshot).



- a. In the Certificates & Secrets page, **Client secrets** section, click **New client secret** (callout 2).
- b. Enter a description, for example: `cx sales client server secret`.
- c. Select a duration for the expiry of Client Secret. For example, if you select 12 months, the Client Secret becomes invalid after 12 months and the automatic refresh stops. The sync process will start only after you sign in to the client again.

If you select **Custom**, enter the start and end dates to be within 24 months. After the end date, you must sign in to the client again, to start the sync.

- d. Click **Add**.
- e. Copy the generated string from the **Value** field. This value is the application key.

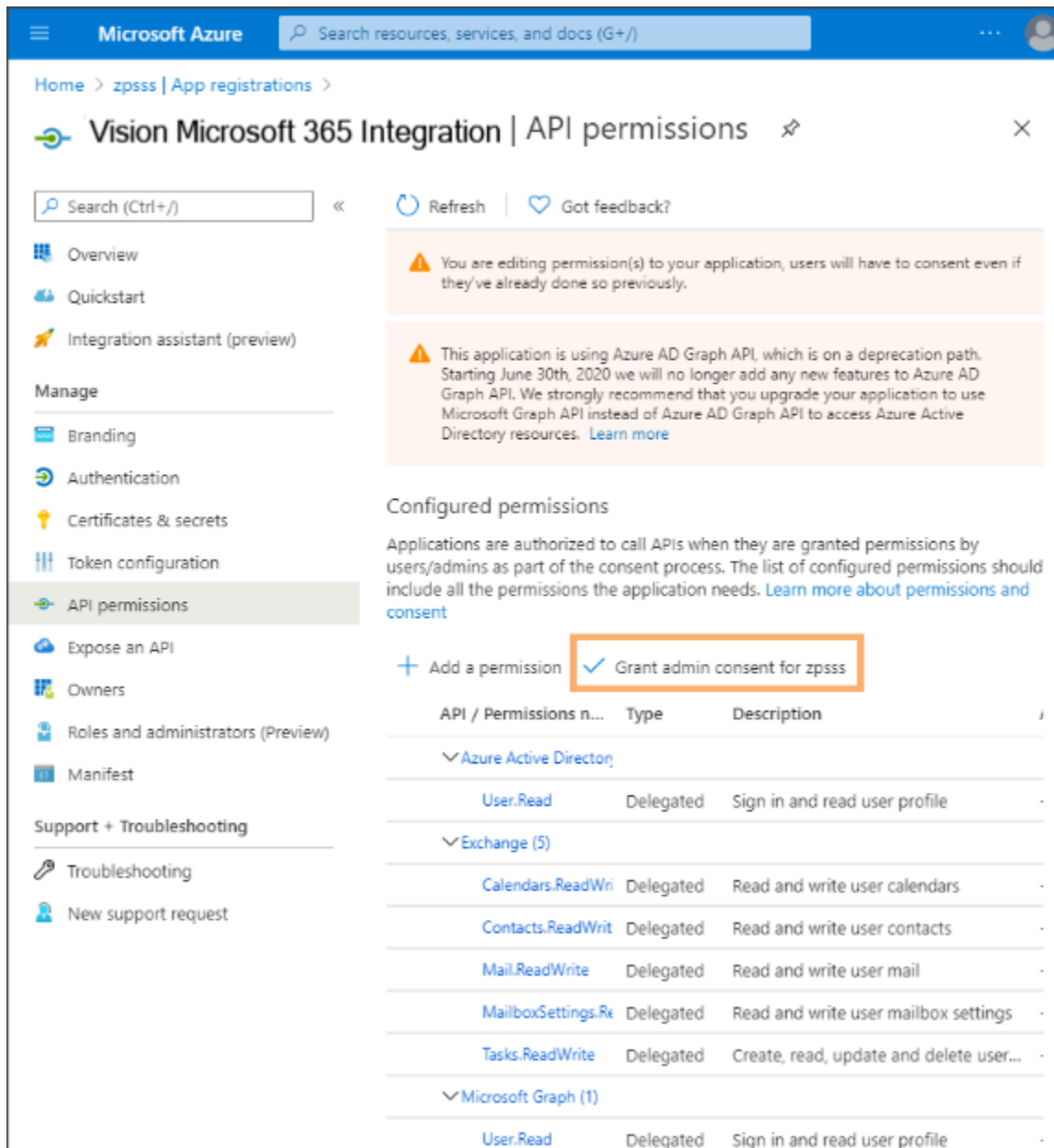
12. In the left pane, under the Manage heading, click **API permissions** and make these entries:

- a. Click **Add a permission**.
- b. On the Request API permissions page, switch to the **APIs my organization uses** tab.
- c. Search for the term 'Office' and select **Office 365 Exchange Online**.
- d. Click **Delegated permissions**. and add the following permissions.

| Permission      | Option to select                          |
|-----------------|-------------------------------------------|
| Calendars       | Calendars.ReadWrite                       |
| Contacts        | Contacts.ReadWrite                        |
| MailboxSettings | MailboxSettings.ReadWrite                 |
| Mail            | Mail.ReadWrite                            |
| Tasks           | Tasks.ReadWrite<br>Tasks.ReadWrite.Shared |

- e. Click **Add Permissions**.

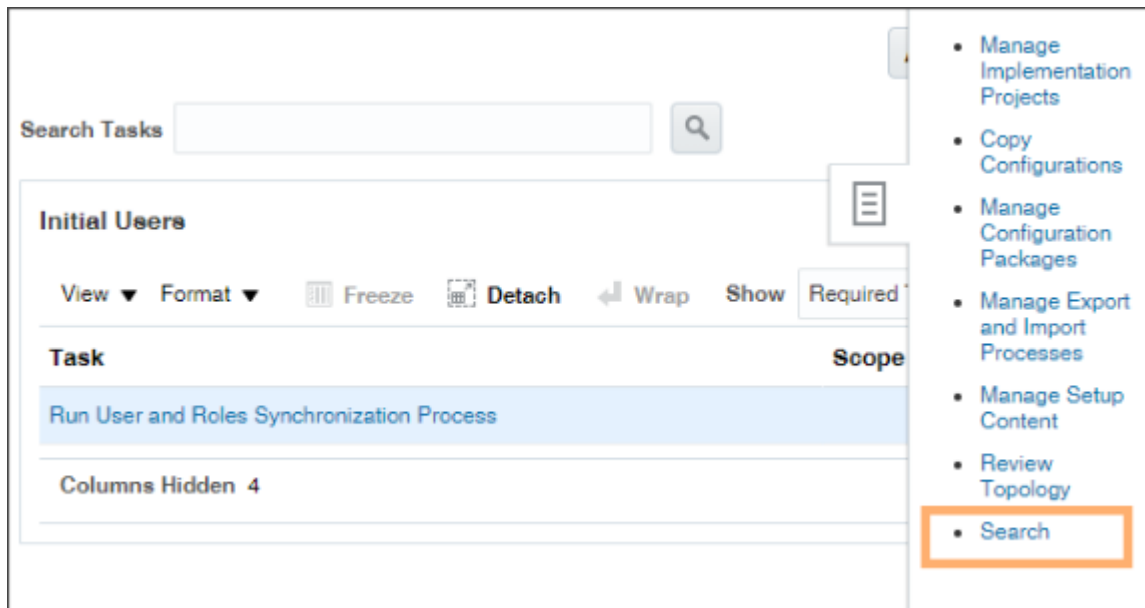
- f. On the API permissions page, click **Grant admin consent** to consent on the behalf of users (center of the right-hand pane of the page highlighted in the screenshot).



## Generate the Microsoft 365 Manifest File in CX Sales

1. Sign in as a setup user into your sales application.

2. In Setup and Maintenance, open the side panel and search for the task Manage Microsoft 365. Here's the open side panel with the Search field highlighted.



3. Accept the End User License Agreement.
4. In the Manage Microsoft 365 page, Outlook tab, Set Up Outlook Integration section, enter the Application ID and the Application Key you copied from Microsoft Azure. Also enter Tenant ID and Domain name
5. Enter an application display name. This is the name on the add in that appears to users in Outlook.
6. Save.  
The application generates the manifest file.
7. Download the manifest file to your desktop.

## Enable Synchronization of Data

While in the Manage Microsoft 365 page, you must also enable the synchronization of data between Sales and Microsoft 365. The actual synchronization is accomplished by processes you run in a separate step. Selecting these check boxes just enables the processes to do their job.

1. In the Synchronization Settings section, Select the **Sync Enabled** check boxes for Contacts, Appointments, and Tasks, depending on what you use.
2. Save your changes.

You can find additional information about the sync setting in [Manage Microsoft 365](#)

## Upload the Manifest File and Deploy the Add-In

1. Sign in to the Microsoft 365 portal: <https://portal.microsoft.com>.
2. In the left-side panel, click the **Navigation Menu** and **Show all**. Then select **Settings > Integrated apps**.
3. For App type, select **Office Add-in**.
4. Select **Upload manifest file (.xml) from device**, and select the manifest file you downloaded earlier.
5. Click **Next**.
6. On the **Configure add-in** page, you can specify who gets the add-in and if users can hide the add-in from the Outlook ribbon. By default the add-in is automatically placed in the Outlook ribbon for all users.

- Assign Users

You can limit who gets the add-in for: specific users (for testing, for example), groups (for example, to users in Sales), or an entire organization.

- Deployment Method

- If you're rolling out the add-in to the whole sales organization, consider accepting the **Fixed (Default)** option.
- If you're testing with a few administrators, then **Available** may be the better option. Administrators may test both the test and production environments at the same time, and might want to hide one or the other from their ribbon.
- **Optional** makes sense if you don't want the add-in showing up on any of the users' ribbons unless they need to test it.
- The **Available** and **Optional** deployment methods make it possible for users to hide the add-in from their ribbon.

**7.** Review and finish the deployment.

The application confirms the deployment is complete and the add-in appears in the list on the Add-ins page. It can take 12 hours for the deployed add-in to appear on a user's Outlook ribbon. Users who are added to the group are automatically assigned the add-in. And, when users are removed, they lose access to the add-in.

## Manage Microsoft 365

You must configure several settings that let the Microsoft 365 Sales for Outlook add-in run smoothly, such as sync options, default saved search, conflict resolution, and record sync limits.

**Note:** Oracle recommends that you use the Redwood User Experience (UX) version of the Microsoft Outlook add in, not the previous version. See [Overview of Microsoft 365 for Redwood UX](#) for more information.

### Navigate to the Manage Microsoft 365 Page

**Note:** It's assumed you have already done the steps in the [Enable Microsoft 365 Integration](#) topic, before you begin to manage the application.

Here's how to get to the Manage Microsoft 365 page, where you set the options:

1. Sign in as a setup user or as the sales administrator.
2. Navigate to:
  - Offering: Sales
  - Functional Area: Integrations
  - Task: Manage Microsoft 365
3. You can find the settings in the Manage Microsoft 365 page.

### Options You Can Set

**Note:** It's assumed you've already read the topic, [Synchronize Data Between CX Sales and Microsoft 365](#).

This table describes the contacts, appointments, and tasks sync settings.

| Settings Area            | Setting Name                                       | Description                                                                                                                                                                                                                                                                                                                                                                                                                |
|--------------------------|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Conflict Resolution      | Default Conflict Resolution                        | <ul style="list-style-type: none"> <li>CX Server Wins: The records in the Sales application overwrite the records in Microsoft 365.</li> <li>Outlook Client Wins: The records in Microsoft 365 overwrite the records in the Sales application.</li> <li>User Selected: Users can select at runtime the way to resolve conflicts.</li> </ul> <p>See <a href="#">Configure Conflict Resolution</a> for more information.</p> |
|                          | Allow User to Override Default Conflict Resolution | Lets users view the conflict resolution options in the add-in and select the option they want.                                                                                                                                                                                                                                                                                                                             |
| Usage Tracking           | Enable Add-in Usage Tracking                       | Lets you track the usage of the Microsoft 365 add-in by your users. See <a href="#">Microsoft 365 Monitor</a> .                                                                                                                                                                                                                                                                                                            |
| Synchronization Settings | Enable Application Permission                      | This setting enables standard sync to gain access to all the mailboxes so that users don't have to frequently sign in into the add-in. See <a href="#">Enable Improved Sign-In Experience with Application Permissions</a> for more information.                                                                                                                                                                           |
|                          | Enable Dynamic Batching for Sync                   | This setting auto-enables the sync engine to determine the optimized batch size for sync, based on the Oracle server capacity. This improves performance.                                                                                                                                                                                                                                                                  |
|                          | Allow Users to Select Default Saved Search         | Selecting this check box causes the default saved search defined in the Microsoft 365 Designer as the saved search for all the users. Custom saved searches specified by users in the add-in are ignored. See <a href="#">Sync Records Between the Sales Application and Microsoft 365 Outlook</a> for details about the end user experience.                                                                              |
|                          | Synchronization Tracking                           | This setting lets you monitor the sync statistics and displays the details in the Microsoft 365 Monitor. See <a href="#">Microsoft 365 Monitor</a> for more details.                                                                                                                                                                                                                                                       |
|                          | Include Attachments in Sync                        | This setting lets the sync engine share attachments on emails or appointments with Sales.                                                                                                                                                                                                                                                                                                                                  |
|                          | Attachment Size Limit                              | The maximum size limit is 10 MB. You can configure according to your business needs. Files larger than the size you configured here won't be shared with Sales. See <a href="#">What's the allowed attachment file type and size for sharing emails?</a> for more details.                                                                                                                                                 |
| Contacts                 | Enable Sync                                        | This is a primary setting to indicate you want to sync contacts. If this setting is disabled, other settings in this section are disabled, too.                                                                                                                                                                                                                                                                            |



| Settings Area | Setting Name                                 | Description                                                                                                                                                                                                                                                                                                                                                               |
|---------------|----------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|               | Allow Sync to Create CX Contacts             | When a user shares new contacts from Outlook, new contact records are created in the sales application. See <a href="#">Share Email and Meetings</a> for details about the end user experience.                                                                                                                                                                           |
|               | Allow Sync to Delete CX Contacts             | This setting means that when a user removes a contact in Outlook, the corresponding contact records are removed in Sales.                                                                                                                                                                                                                                                 |
|               | Limit                                        | Enter the number of records to be synced in every run of the sync process.                                                                                                                                                                                                                                                                                                |
| Appointments  | Enable Sync                                  | This is a primary setting to indicate you want to sync appointments. If this setting is disabled, other settings in this section are disabled, too.                                                                                                                                                                                                                       |
|               | Enable Bidirectional Sync                    | If set to a yes value, appointments are synced between Sales and Outlook. If you deselect it, the sync engine only syncs appointments from Outlook to Sales and not from Sales to Outlook. To learn more, see the <a href="#">One-Way Synchronization for Appointments</a> topic. See <a href="#">Share Email and Meetings</a> for details about the end user experience. |
|               | Allow Sync to Create CX Appointments         | If set to a yes value, this setting means that when a user shares meetings from Outlook, appointment records are created in Sales.                                                                                                                                                                                                                                        |
|               | Allow Sync to Delete CX Appointments         | If set to a yes value, when a user removes a meeting or an appointment from Outlook, the corresponding appointment record is removed from Sales.                                                                                                                                                                                                                          |
|               | Autocapture Appointments                     | If set to a yes value, appointments are automatically synced without the need for the users to tag the appointments as Shared with Oracle. See <a href="#">Autocapture Appointments</a> to learn more.                                                                                                                                                                    |
|               | Capture Appointments with Empty Invitee List | This setting is available only when Auto-capture Appointments is selected. Select this setting to sync those appointments that don't have any invitees. Usually, salespeople create such appointments to block some time on their calendars to complete priority tasks.                                                                                                   |
|               | Include Private Appointments                 | Users' private appointments are synced during the auto-sync of appointments.                                                                                                                                                                                                                                                                                              |
|               | Allow Invitees to Share Appointments         | Allows salespeople to share the meetings they were invited to.                                                                                                                                                                                                                                                                                                            |
|               | Limit                                        | Enter the number of records to be synced in every run of the sync process.                                                                                                                                                                                                                                                                                                |
| Tasks         | Enable Sync                                  | This is a primary setting to indicate you want to sync tasks. If this setting is disabled, other settings in this section are disabled too.                                                                                                                                                                                                                               |
|               | Allow Sync to Create CX Tasks                | When a user shares emails from Outlook, emails are saved as tasks in the sales application.                                                                                                                                                                                                                                                                               |

| Settings Area                      | Setting Name                       | Description                                                                                                                                                                     |
|------------------------------------|------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                    | Allow Sync to Delete CX Tasks      | When a user deletes an email from Outlook, the corresponding task is removed from the sales application.                                                                        |
|                                    | Include Private Tasks from Outlook | Syncs the private tasks in Outlook with the sales application.                                                                                                                  |
|                                    | Limit                              | Enter the number of records to be synced in every run of the sync process.                                                                                                      |
| End User License Agreement Details | Agreement Acceptance               | Shows the user who has accepted the terms and conditions mentioned in the end user license agreement.<br>Also shows the date and time when the user has accepted the agreement. |
|                                    | View Agreement                     | Click the link to go through the agreement again.                                                                                                                               |

#### Related Topics

- [Manage User Mappings](#)
- [Configure Conflict Resolution](#)

## Post-Setup Steps

### Autocapture Appointments

Let your users' appointments be automatically synced between Microsoft Exchange and Sales. With autocapture enabled, your salespeople don't have to categorize the appointments as Shared with Oracle anymore, for them to be synchronized.

After you enable autocapture of appointments, here's what happens:

- The application automatically shares the appointments that have a Sales contact in the recipients list.
- When all the contacts on the appointment invitee list belong to the same account, the sync engine automatically determines the account and assigns the appointment to the appropriate Sales records.

### Enable Appointment Autocapture

Let's see how you enable the application to automatically create appointments in Sales, even if they aren't categorized as Shared with Oracle in Outlook. This setup means your users save time, because they don't have to share appointments manually by setting the category of the appointment.

1. Navigate to the **Manage Microsoft 365** page.
2. Under **Synchronization Settings > Appointments** ensure that **Enable Sync** setting is checked.
3. Under Appointment Sync Settings, enable the **Autocapture Appointments** option.
4. Save your changes.

## Autosync Private Appointments and Blocked Time

Depending on your organization's preferences, you can let the application autosync private appointments and capture the blocked time of users, as well. See the next two sections for more information.

## Sync Private Appointments

You can configure the application to synchronize private appointments. When you sync private appointments, even appointments that a user has marked as **explicitly private** in Outlook are synchronized to Sales. Here's how to enable this feature:

1. Navigate to the **Manage Microsoft 365** page.
2. Under **Synchronization Settings > Appointments** ensure that **Enable Sync** setting is checked.
3. Ensure that **Autocapture Appointments** is checked.
4. Enable **Include Private Appointments from Outlook**.
5. Save your changes.

## Enable Sync of Blocked Time

Now, let's see how you enable the application to also synchronize "blocked time" appointments. Blocked times are the appointments that don't have any invitees. Salespeople sometimes create such appointments to block some time on their calendars to complete priority tasks or for other reasons.

1. Navigate to the **Manage Microsoft 365** page.
2. Under **Synchronization Settings > Appointments** ensure that **Enable Sync** setting is checked.
3. Ensure that **Autocapture Appointments** is checked.
4. Enable **Capture Appointments with Empty Invitee List**.
5. Save your changes.

## One-Way Sync for Appointments

The sync engine syncs the appointments, contacts, and tasks between Microsoft 365 and Oracle Sales. Every time a user updates or deletes a meeting or an appointment in Sales, the changes are synchronized to Outlook.

Every time the sync runs, notifications about these updates are sent to invitees. To prevent Outlook from sending automatic emails to the invitees, you can set one-way sync for appointments. In one-way sync, changes made to appointments in Outlook are synced to Sales, but the changes made in Sales aren't synced back to the appointments in Outlook.

## Impact of One-Way Sync

Here's the impact of one-way sync for appointments:

- Your users can't use saved searches for appointments.
- Conflicts are set to "server wins" and are read-only.
- Meetings that exist only in Sales aren't synchronized to Outlook. Likewise, changes to meetings in Sales aren't reflected in Outlook.
- Meetings created inside the side panel don't generate an equivalent Outlook meeting.
- If a user resolves sync errors related to appointments from the Resolve Synchronization Errors page, those changes are reflected only in Sales.
- To summarize, the sales application doesn't update or create any appointments in Outlook.

## Change Appointments Sync to One-Way

Bidirectional sync is the default sync for appointments. However, you can change it to one-way. Here's how you change the sync pattern:

1. In the Setup and Maintenance work area, use the Manage Microsoft 365 task:
  - o Offering: Sales
  - o Functional Area: Integrations
  - o Task: Manage Microsoft 365
2. On the Manage Microsoft 365 page, unselect the **Enable Bi Directional Appointment Sync** check box.
3. Save your changes.

**Note:** If a recurring appointment contains a custom field, only the first instance of the appointment is synced with the Sales application. The custom field needs an object trigger or a field trigger. Use the object workflows to update the custom fields in the recurring appointment.

## Configure Conflict Resolution

Conflicting records occur when there's a difference between information saved in Sales and the information in the Microsoft 365 add-in. As an administrator, you can set the conflict resolution preference for your users.

Here are the steps to set the conflict resolution preference:

1. In the Setup and Maintenance work area, use:
  - o Offering: Sales
  - o Functional Area: Integrations
  - o Task: Manage Microsoft 365
2. On the Manage Microsoft 365 page, select the conflict resolution option in the **Conflict Resolution** section.
3. Enable the **Allow User to Override Default Conflict Resolution** option to allow users to view the conflict resolution options in the add-in and select the option they want.
4. Select the conflict resolution option in the Conflict Resolution section:
  - o **Server Wins:** The values in Sales overwrite the values in Microsoft 365 automatically.
  - o **Client Wins:** The values in Microsoft 365 overwrite the values in Sales automatically.
  - o **User Selected:** The user is prompted every time a conflict occurs. The Synchronization Status page displays Successful with Conflicts as the status, along with a list of conflicting records.
5. Save your changes.

## Turn Off the Synchronization Process

When you don't want a continuous synchronization between Sales and Microsoft 365, or when you want to avoid unnecessary sync failures, you can disable (turn off) the synchronization.

Here's how to disable the sync process:

1. In the Setup and Maintenance work area, use:

- Offering: Sales
  - Functional Area: Integrations
  - Task: Manage Microsoft 365
2. Scroll to Synchronization Settings. Under the settings are three sections: Contacts, Appointments, and Tasks. Each section shows an Enable Sync check box and other check boxes within the region, to specifically stop creation or deletion of records.
  3. Let's see each option in detail:
    - **Enable Sync:** Use this check box to stop the to and from synchronization between the sales application and Outlook. For example, deselecting the Sync Enabled check box, which is in the Appointments section, stops syncing meetings or appointments.
    - **Enable Bidirectional Sync:** This setting is available only for appointments. With this setting selected, appointments are synced between CX Sales and Outlook. If you deselect it, the sync engine syncs appointments from Outlook to CX Sales only and not from CX Sales to Outlook. To learn more, see the *One-Way Synchronization for Appointments* topic.
    - **Allow Sync to Create CX Contacts, Appointments, or Tasks:** These are separate settings under each sync category that let you prevent the sync process from creating records in sales application, even if there are new records added in the Outlook. Similarly, it stops creating records in Outlook, if the users have added new records in the sales application. For example, deselecting the **Allow Sync to Create CX Tasks** check box under the Tasks section stops sharing newly created records between Outlook and the sales application.
    - **Allow Sync to Delete CX Contacts, Appointment, or Tasks:** These are separate settings under each sync category that let you prevent the sync process from removing records in Outlook, even when a user deletes the corresponding record in the sales application. Similarly, the process stops deleting records in the sales application when user deletes the corresponding ones in Outlook. For example, deselecting the **Allow Sync to Delete Contacts** check box under the Contacts section stops deleting corresponding records of contacts in the sales application as well as in Outlook.

## Track Usage and Synchronization

As an administrator, you can decide if you want to track and capture user actions on the Microsoft 365 add-in and track synchronization details every day.

The application captures details such as the number of users using the Oracle add-in; the number of resources, contacts, or appointments a user created on a given day; and the data that got synced to Oracle.

Turn on these settings to enable your sales application to track user actions and application synchronization:

1. In the Setup and Maintenance work area, use:
  - Offering: sales
  - Functional Area: Integrations
  - Task: Manage Microsoft 365
2. Scroll down to the **Usage Tracking** section and select the **Enable Add-in Usage Tracking**.
3. Go to the next section, **Synchronization Settings** and select the **Enable Synchronization Tracking** check box.
4. Click **Save and Close**.

The add-in starts collecting the data after you turn on the settings. It doesn't generate any reports. Based on your need in future, you can use this data for reporting purposes and draw useful insights.

## Synchronize Data Between CX Sales and Microsoft 365

Run three processes to synchronize data in your sales application with Microsoft 365:

For sync settings information, see [Manage Microsoft 365](#).

| Process                         | Description                                                                                                                                                                                                                      |
|---------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Microsoft 365 Instant Sync Job  | Synchronizes the Microsoft 365 activities shared with your sales application.<br><br>You can share an appointment or email with Oracle CX Sales. Appointments are synchronized as appointments and emails synchronized as tasks. |
| Microsoft 365 Standard Sync Job | Synchronizes the contacts and activities between Microsoft 365 and your sales application.                                                                                                                                       |
| Microsoft 365 Token Refresh Job | This mandatory process synchronizes and refreshes your login credentials for the scheduled processes to run successfully                                                                                                         |

**Note:** For your data to be synchronized, you must make sure that synchronization is enabled in the Manage Microsoft 365 task. You should have already completed this setup while enabling the integration.

### Best Practices for Sync Frequency

Here's are the recommended frequencies for the sync jobs:

- Microsoft 365 Token Refresh Job: Schedule this to run every 3 Hours. This job keeps the users' tokens active all the time.
- Microsoft 365 Instant Sync Job: Schedule this for every 1 hour.
- Microsoft 365 Standard Sync Job: Schedule this for every 4 hours.

If you're required to change the frequencies of the Standard Sync and Instant Sync jobs, evaluate the customer environment before making the changes. Also, consider factors such as number of total users and volume of data being synchronized.

A good approach to determine the frequency is to monitor these jobs for some time and evaluate how long the jobs are taking to complete. Based on the actual 'Run Time' (time taken for a job to complete), you can determine the frequency. For example, if the Standard Sync job instances are consistently completing in an hour, you can change the frequency from 4 hours to 2 hours. Similarly, you can change the Instant Sync jobs frequency to 30 minutes, if they're completing in about 15 minutes.

#### Related Topics

- [What are scheduled processes?](#)
- [Submit Scheduled Processes and Process Sets](#)

## Microsoft 365 Monitor

The Microsoft 365 Monitor is a dashboard where you can see the synchronization statuses of all active users of the Microsoft 365 add-in. Along with viewing the users, you can also control synchronization activities.

To open the Microsoft 365 Monitor:

1. In the Setup and Maintenance work area, use the **Manage Microsoft 365** task:
  - o Offering: Sales
  - o Functional Area: Integrations
  - o Task: Manage Microsoft 365
2. From the Manage Microsoft 365 page, open **Microsoft 365 Monitor**.

The Microsoft 365 Monitor shows four information cards about the add-in usage:

- Last Sync Failed
- Never Synced
- In Progress
- Last Sync Succeeded

| Information Card Name | What It Shows                                                                                                                                                                                                                                |
|-----------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Last Sync Failed      | Shows the number of users whose data from the add-in didn't sync with the sales application in the most recently run sync job.                                                                                                               |
| Never Synced          | Shows the number of users whose data from the Microsoft 365 add-in never synced with the sales application, from the time the add-in was installed.                                                                                          |
| In Progress           | Shows the number of users whose data is still syncing with the sales application. If you must hold the synchronization for any reason, you can select the users and select <b>Suspend Sync</b> or <b>Disable Sync</b> from the Actions menu. |
| Last Sync Succeeded   | Shows the number of users whose data successfully synced from the add-in to the sales application.                                                                                                                                           |

You can see a table below the information cards. This table, by default, shows the details of Last Sync Failed information card. When you click any of the other information cards, the table refreshes to show details of the selected information card. Each information card shows:

- **Last:** Shows the last sync status.
- **User:** Shows the user name according to sales application.
- **Microsoft 365 User:** Shows the user name according to Microsoft.
- **Last Sync Start:** Shows the start time of the last sync.

- **Duration:** Shows the total duration of the last sync.  
**Note:** Total duration includes Microsoft 365 duration, CX Sales duration, and also the time taken by any additional internal processes.
- **Active:** Shows a tick icon if the user's credentials or token was active.  
**Note:** **Active** may show a failed icon, if CX Sales token refresh failed. This can happen if the Token Refresher scheduled process hasn't been run for a long time. When you see the failed icon, ask the user to sign into the add-in.
- **Authorized:** Shows a tick icon if the user's Microsoft credentials or token were active.  
**Note:** If the Microsoft token refresh failed, **Authorized** may show a failed icon. This can happen if the sync engine wasn't run for a long time. When you see the failed icon, ask the user to sign into the add-in.

## Available Actions

You can perform these actions, based on the synchronization data or the user data:

- **Suspend Sync:** Select a user or more to suspend an ongoing synchronization.
- **Disable Sync:** Select a user or more to disable future data synchronization. However, if you want to resume the synchronization, select the same users and select Enable Sync from the actions. The Enable Sync action is available only for the users whose synchronization is already disabled.
- **Delete User:** Select a user or more to delete their details from this table. Note that this doesn't delete the user from the sales application.
- **Update User Credentials:** Select a user and choose this action. A new window opens in which you can update the user's Microsoft email address or the sales application user name. Save your changes.
- **Export:** Select Export to download the user details as a .csv file.

## User Details Page

To go to the User Details page, click the user name under the User column in the table related to each information card. The page shows:

- **Name:** The name of the user.
- **Status:** Shows the status against the three parameters: Authorized, Active, and Sync Enabled.  
**Note:** The failed statuses for Authorized and Active statuses could be because of a Microsoft token or CX Sales token refresh failure. If you have manually disabled the synchronization for a user, the status appears as Sync Disabled.
- **Synced Records and Conflict Resolution:** Shows the active saved searches and their corresponding conflict resolution, which was set by the administrator or the user.
- **Synchronization History:** Shows the synchronizations run for the user.
- **Actions:** Three actions are available on this page: Disable Sync, Delete User, and Update User Credentials. Depending on the need, you can use them. The Enable Sync action is available if the user was disabled earlier.
- Click **Close** to get back to the Microsoft 365 Monitor page.



## Open the Add-In from Outlook for the First Time

Here's what to do when you open the Oracle add-in from Outlook for the first time:

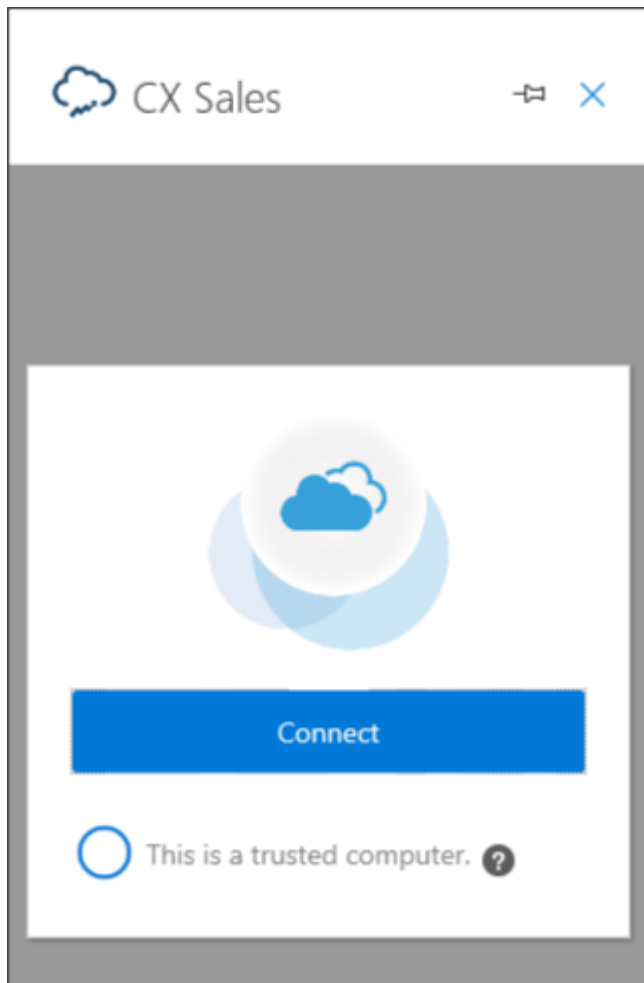
1. Navigate to Microsoft Outlook on the web or open Outlook on your computer and sign in. Respond with yes to any messages about Outlook being a trusted device.
2. In Outlook, click on an email to preview it.
3. In the menu bar of the email, click the **More actions** menu. This image shows an example:



**Note:** If you don't preview or open an email, you won't be able to see the More actions menu.

4. Select the Outlook add-in.
5. The connection may take a while to establish. Wait for the connection to establish. If the add-in is attempting to connect, you'll see a "working" indicator.

6. Click **Connect**.



You're prompted to sign in to CX Sales in a separate browser window. When you sign in, CX Sales links the Microsoft 365 and CX Sales users. From now on, you must be signed in as the same Microsoft 365 user to view the CX Sales user's information. The linking prevents you from signing in as another CX Sales user. You can uncouple the two accounts, however, by following the instructions in the topic [Manage User Mappings](#).

*Related Topics*

- [Manage User Mappings](#)

## Additional Configurations

### Enable Improved Sign-In Experience with Application Permissions

When you set up the application in Microsoft Azure for this integration by following the setup steps, you would have granted delegated permissions to the APIs required for the integration, such as Calendars.ReadWrite. These API permissions are needed so that sync and the add-in can access user's emails, appointments, contacts, and tasks in Microsoft.

With delegated permissions, when your users' Microsoft token expires (90 days from last sign-in in the add-in), the sync fails with error until the users re-sign into the add-in.

If you want sync to continue seamlessly without your users needing to sign-in to the add-in every 90 days, then you can add application permissions for the APIs required for the integration to the application registered in Microsoft Azure.

After you give the extra application permissions to the application in Microsoft Azure, the standard sync scheduled process uses the permissions to sign in. The add-in, meanwhile, continues to use the existing delegated permissions.

**Note:** Only administrators can enable the application permissions.

After you give the extra application permissions, your users need to sign in to the add-in just once and then they don't need to open the add-in again.

### Add and Enable Application Permissions

To add and enable the application permissions for the add-in:

1. Add the application permissions in Microsoft Azure for the application you created for the Oracle Microsoft 365 add-in.
2. Enable application permissions in the Sales application.
3. Notify your users to sign into the add-in once.

#### Add Application Permissions in Microsoft Azure

1. Sign in to Microsoft Azure.
2. Open the application you registered for the Oracle Microsoft 365 add-in.
3. Go to the **API Permissions** tab and click **Add a permission**.
4. Select **APIs my organization uses**.
5. Search for *office* and select **Office 365 Exchange Online**.
6. Click **Application Permissions** and add the permissions shown in this table:

| Permission | Option to Select        |
|------------|-------------------------|
| Calendars  | Calendars.ReadWrite.All |
| Contacts   | Contacts.ReadWrite      |

| Permission       | Option to Select          |
|------------------|---------------------------|
| Mail             | Mail.ReadWrite            |
| Mailbox Settings | MailboxSettings.ReadWrite |
| Tasks            | Tasks.ReadWrite           |
| User             | User.Read.All             |

7. Click **Add Permissions**.
8. On the API permissions page, select **Grant admin consent** for each permission you added to consent on behalf of users.

### Enable Application Permissions in the Sales Application

1. In the Setup and Maintenance work area, use the Manage Microsoft 365 task:
  - o Offering: Sales
  - o Functional Area: Integrations
  - o Task: Manage Microsoft 365
2. Under Synchronization Settings, enable the **Enable Microsoft Application Permission** option.
3. Click **Save and Close**.

## Configure an Application Access Policy to Secure Your Mailboxes

Theoretically, any accounts using the application with the application permissions granted can gain access to all mailboxes in the Microsoft tenant that the application is for. However, Oracle Microsoft 365 sync processes – which uses this application – only uses the application to access users' mailboxes who have signed in to the add-in. The add-in doesn't use application permissions on the application; it only uses the delegated permissions.

Depending on your company's security requirements, you may want to further restrict this application to only certain users. For that, you can configure an application access policy before you enable the application permissions on the application.

**Note:** Configuring application access policy is optional and depends on your business' security requirements.

As a Microsoft Azure administrator, configure an application access policy:

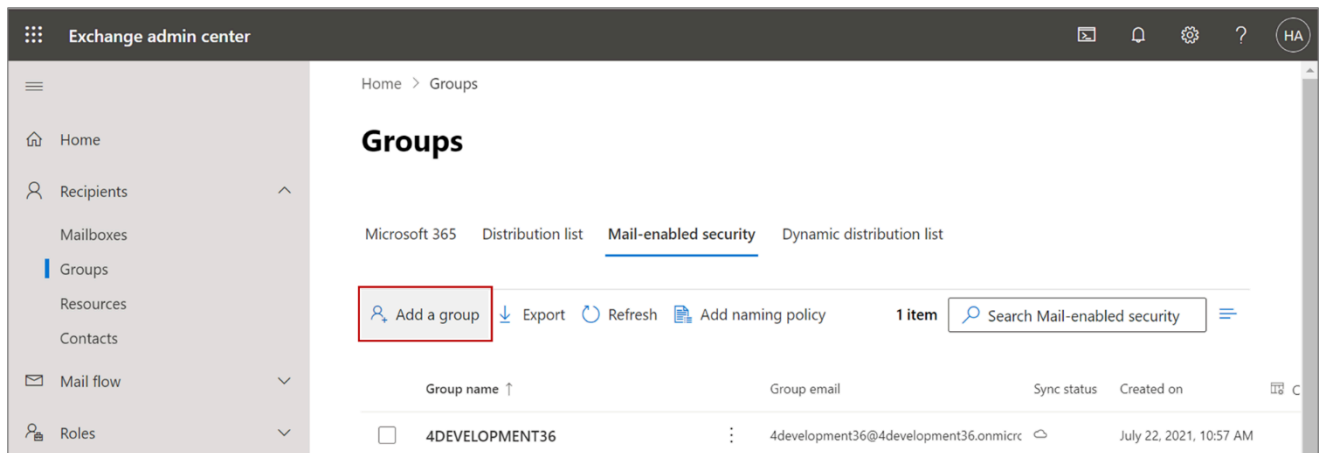
1. Create a mail-enabled security group in the Microsoft Exchange admin center.
2. Create an application access policy in Microsoft PowerShell for the security group you created.

The access policy restricts the scope of mailboxes that the standard sync process can access.

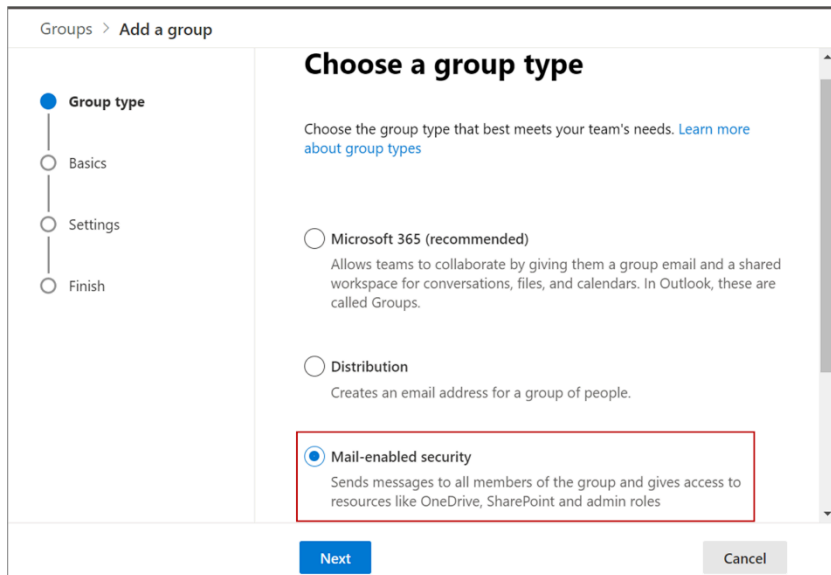
### Create a Mail-Enabled Security Group

1. Sign in to the Exchange Admin Center at <https://admin.exchange.microsoft.com/#/>.
2. Navigate to **Groups > Mail-enabled security**.

3. Click **Add a group**, as shown in this screenshot:



4. In the Group type section, select **Mail-enabled security** and click **Next**, as shown in this screenshot:



5. In the Basics section, enter a name and description, and click **Next**, as shown in this sample screenshot:

The screenshot shows a web interface for creating a group. At the top, a breadcrumb trail reads 'Groups > Add a group'. On the left, a vertical navigation pane contains four steps: 'Group type' (checked with a blue circle), 'Basics' (highlighted with a blue circle), 'Settings' (unselected), and 'Finish' (unselected). The main content area is titled 'Set up the basics' and includes the instruction 'To get started, fill out some basic info about the group you'd like to create.' Below this, there is a 'Name \*' field with the placeholder text 'New group' and a 'Description' field with the placeholder text 'Enter a description for your new group'. At the bottom of the form, there are three buttons: 'Back', 'Next', and 'Cancel'.

6. In the Settings section, enter the group email address, and configure the following. The image shows the Settings menu, with the Edit settings page active. It also shows two check boxes in the Communication and Approval sections.
- a. **Communication:** Do not select the check box.
  - b. **Approval:** Select the **Require owner approval to join the group** check box, as shown in the following screenshot.

7. In the Finish section, verify all the details, and click **Create group**, as shown in this example screenshot:

Groups > Add a group

✓ Group type

✓ Basics

✓ Settings

● **Finish**

You're almost there - make sure everything looks right before adding your new group.

**Group type**  
Mail-enabled security  
[Edit](#)

**Basics**  
Name: Limit Access  
Description: None provided  
[Edit](#)

**Settings**  
Email: fusion1@4development36.onmicrosoft.com  
Communication: Disabled  
Require owner approval to join the group: No  
[Edit](#)

[Back](#) [Create group](#) [Cancel](#)

8. The mail-enabled security group you created shows up in the Groups list, as shown in this screen shot:

Home > Groups

## Groups

Microsoft 365   Distribution list   Mail-enabled security   Dynamic distribution list

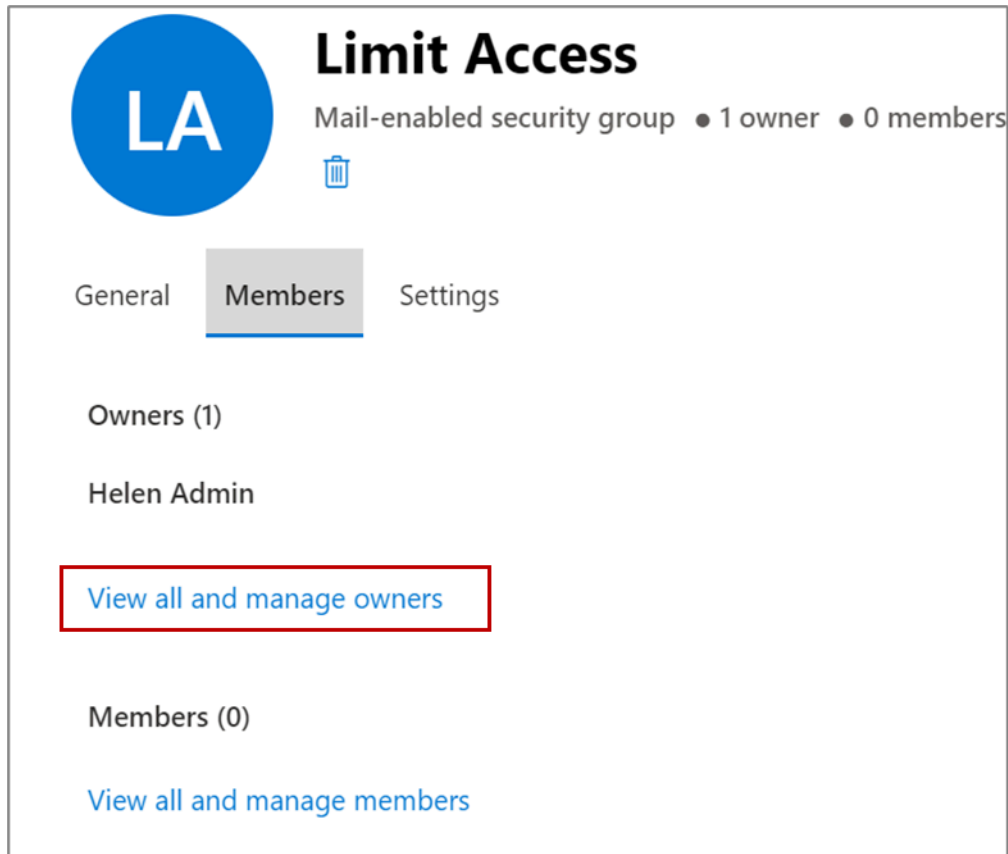
[Add a group](#)
[Export](#)
[Refresh](#)
1 item

| Group name ↑                          | Group email                                | Sync status | Created on              |
|---------------------------------------|--------------------------------------------|-------------|-------------------------|
| <input type="checkbox"/> Limit Access | limitaccess@4development36.onmicrosoft.com |             | January 11, 2022, 10:46 |

9. Next, you need to assign owners and add members to the group. To do that, click the group name.

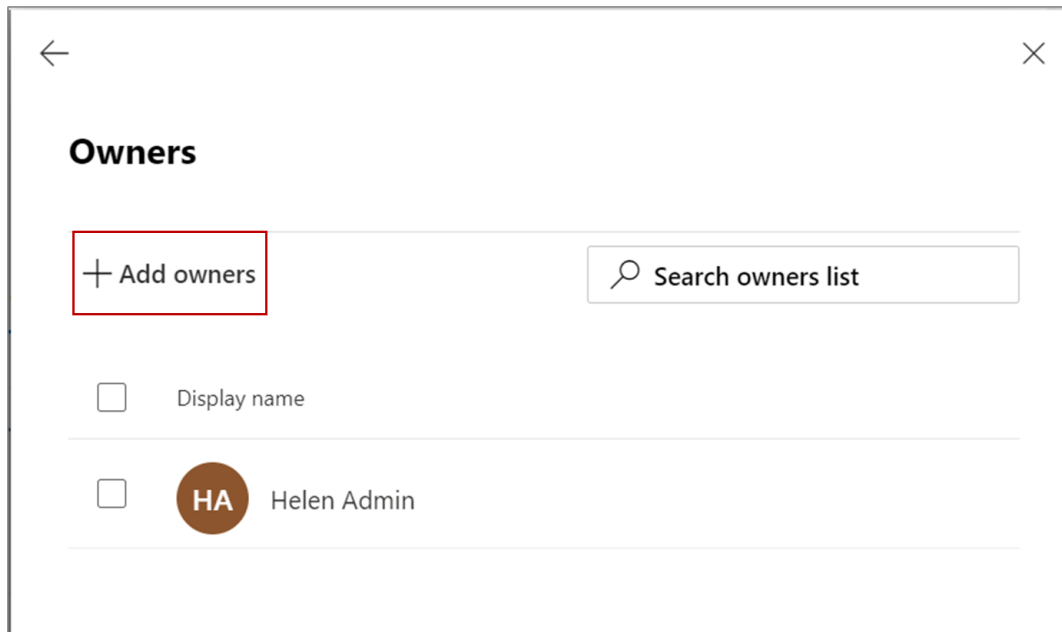
10. On the Group Details window, click the **Members** tab.
  - a. You are the owner of the group you created. If you want to add more owners, click **View all and manage owners**.

The following screenshot shows the Limit Access window with the Members tab highlighted, along with the View and manage all owners link:

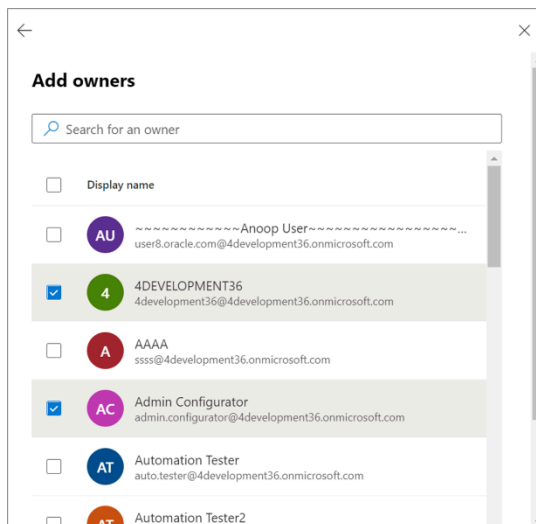


- b. On the Owners page, click **Add owners**, as shown in this screenshot:



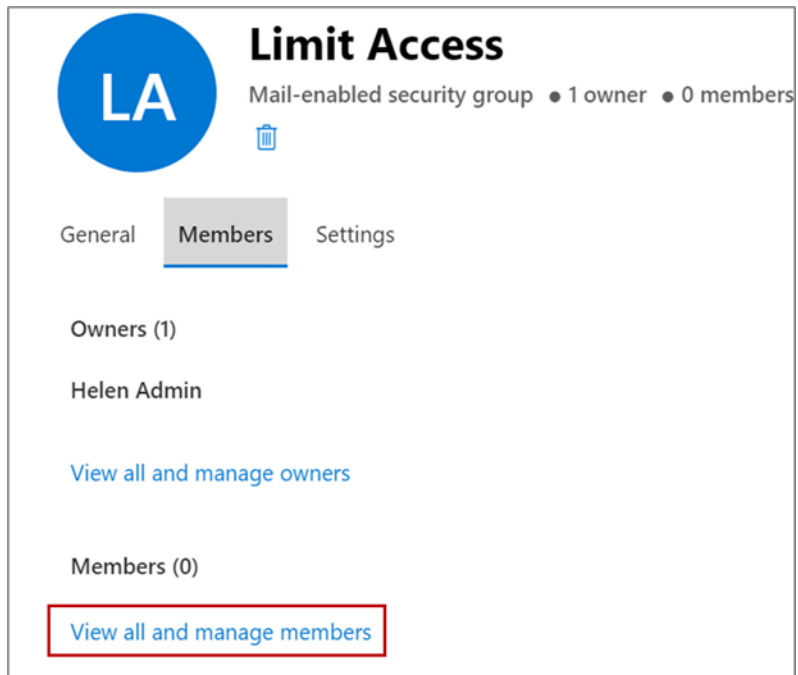


- c. Select the group owners from the list and click **Add**, as shown in this screenshot:



Click the back arrow to go back to the Members tab.

- d. Next, to the security group, add users you want to give a seamless access to. On the Members tab, click **View all and manage members**, as shown in this screenshot:.



- e. On the Members page, click **Add members**.
- f. Select the members from the list and click **Add**.

Click the back arrow to go back to the Members tab.

- 11. Close the group.

The mail-enabled security group is ready for use.

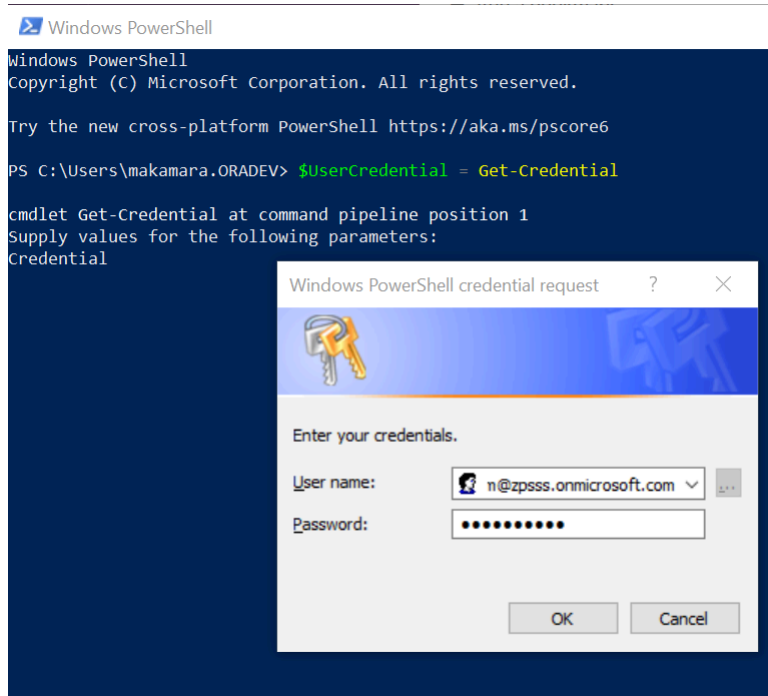
## Create an Application Access Policy

- 1. Open Windows PowerShell.

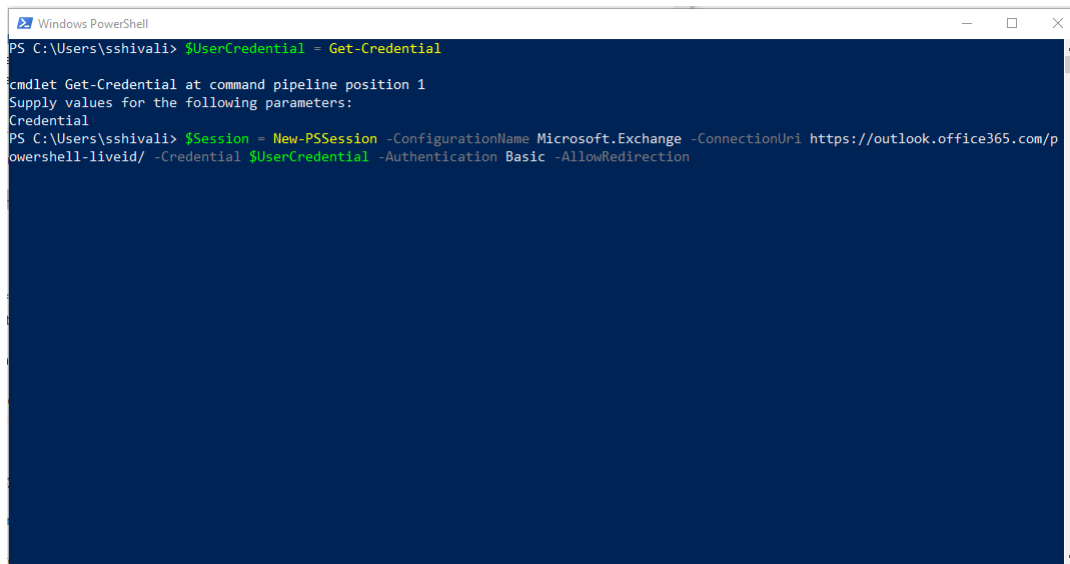
## 2. Run the following commands in Windows PowerShell.

- `$UserCredential = Get-Credential`

On entering the command, a window to enter your Windows PowerShell administrator credentials appears. Enter the administrator credentials, as shown in this sample screenshot:



- Next, enter the command, `$Session = New-PSSession -ConfigurationName Microsoft.Exchange - ConnectionUri https://outlook.office365.com/powershell-liveid/ -Credential $UserCredential - Authentication Basic -AllowRedirection,` as shown in this sample screenshot:



```

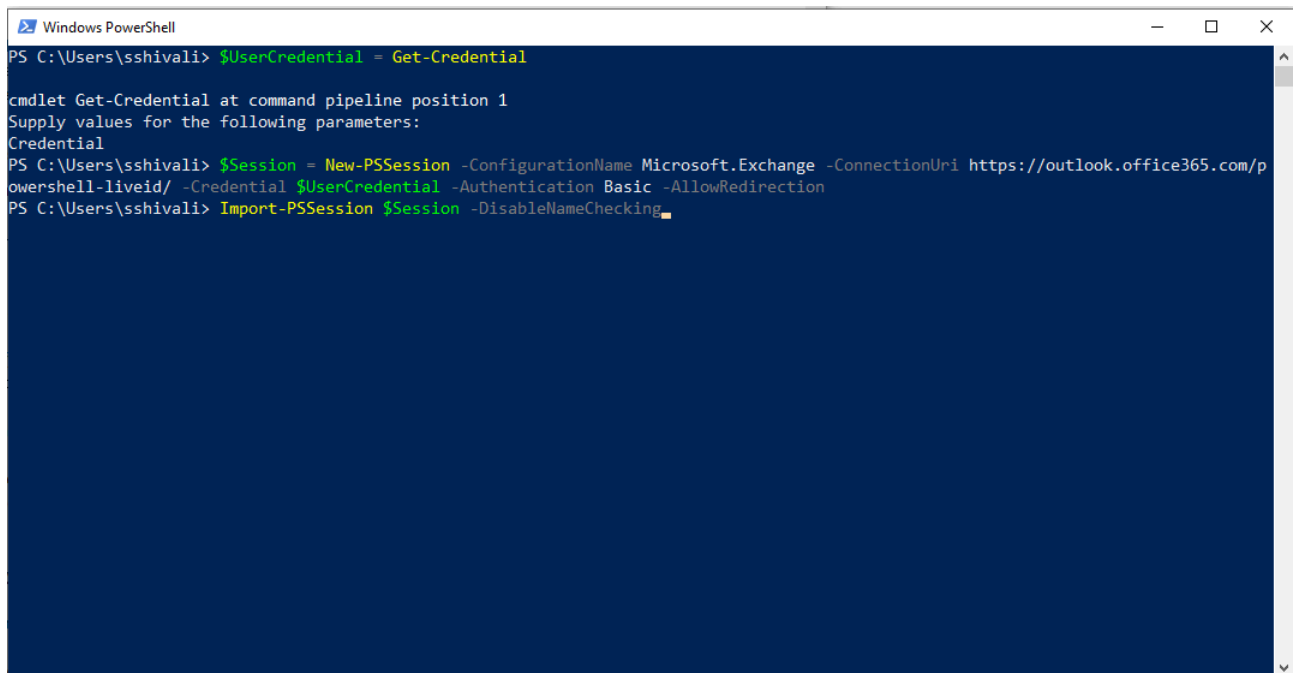
Windows PowerShell
PS C:\Users\sshivali> $UserCredential = Get-Credential

cmdlet Get-Credential at command pipeline position 1
Supply values for the following parameters:
Credential
PS C:\Users\sshivali> $Session = New-PSSession -ConfigurationName Microsoft.Exchange -ConnectionUri https://outlook.office365.com/powershell-liveid/ -Credential $UserCredential -Authentication Basic -AllowRedirection

```

You get a prompt to enter your administrator credentials again. Enter them.

- Next, enter the command, `Import-PSSession $Session -DisableNameChecking`, as shown in this sample screenshot:



```

Windows PowerShell
PS C:\Users\sshivali> $UserCredential = Get-Credential

cmdlet Get-Credential at command pipeline position 1
Supply values for the following parameters:
Credential
PS C:\Users\sshivali> $Session = New-PSSession -ConfigurationName Microsoft.Exchange -ConnectionUri https://outlook.office365.com/powershell-liveid/ -Credential $UserCredential -Authentication Basic -AllowRedirection
PS C:\Users\sshivali> Import-PSSession $Session -DisableNameChecking

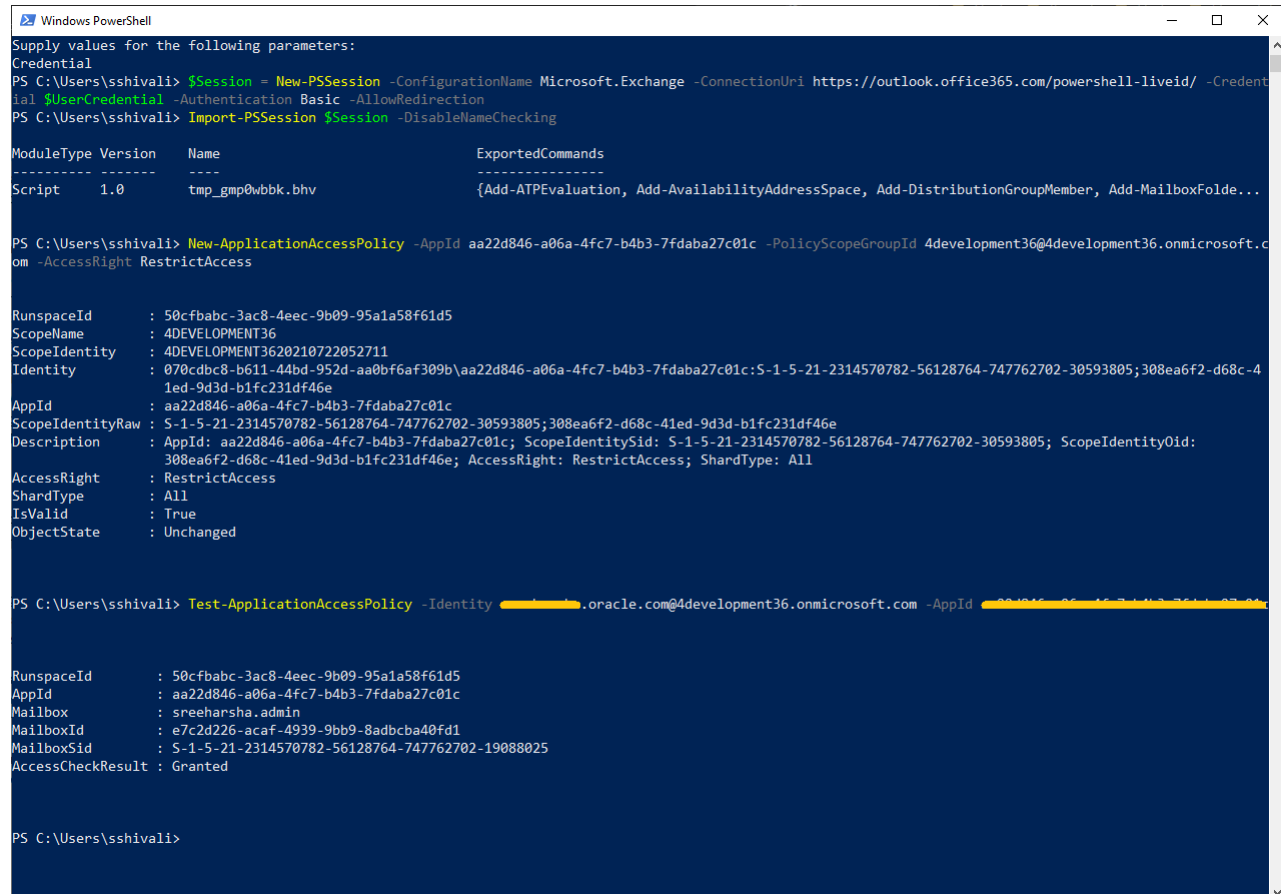
```



## 5. Test the newly created application access policy.

Run the following command, replacing the arguments for Identity and App Id. Identity is the user's email address added to the Security Group and AppId is the Application Id registered with Microsoft Azure.

- `Test-ApplicationAccessPolicy -Identity <Identify> -AppId <AppId>`



```
Windows PowerShell
Supply values for the following parameters:
Credential
PS C:\Users\sshivali> $Session = New-PSSession -ConfigurationName Microsoft.Exchange -ConnectionUri https://outlook.office365.com/powershell-liveid/ -Credenti
ial $UserCredential -Authentication Basic -AllowRedirection
PS C:\Users\sshivali> Import-PSSession $Session -DisableNameChecking

ModuleType Version      Name                               ExportedCommands
-----
Script      1.0             tmp_gmp0wbkbk.bhv                {Add-ATPEvaluation, Add-AvailabilityAddressSpace, Add-DistributionGroupMember, Add-MailboxFolde...

PS C:\Users\sshivali> New-ApplicationAccessPolicy -AppId aa22d846-a06a-4fc7-b4b3-7fdaba27c01c -PolicyScopeGroupId 4development36@4development36.onmicrosoft.c
om -AccessRight RestrictAccess

RunspaceId      : 50cfbabc-3ac8-4eec-9b09-95a1a58f61d5
ScopeName       : 4DEVELOPMENT36
ScopeIdentity    : 4DEVELOPMENT3620210722052711
Identity        : 070cdbc8-b611-44bd-952d-aa0bf6af309b\aa22d846-a06a-4fc7-b4b3-7fdaba27c01c:S-1-5-21-2314570782-56128764-747762702-30593805;308ea6f2-d68c-4
1ed-9d3d-b1fc231df46e
AppId           : aa22d846-a06a-4fc7-b4b3-7fdaba27c01c
ScopeIdentityRaw : S-1-5-21-2314570782-56128764-747762702-30593805;308ea6f2-d68c-41ed-9d3d-b1fc231df46e
Description     : AppId: aa22d846-a06a-4fc7-b4b3-7fdaba27c01c; ScopeIdentitySid: S-1-5-21-2314570782-56128764-747762702-30593805; ScopeIdentityOid:
308ea6f2-d68c-41ed-9d3d-b1fc231df46e; AccessRight: RestrictAccess; ShardType: All
AccessRight     : RestrictAccess
ShardType       : All
IsValid         : True
ObjectState     : Unchanged

PS C:\Users\sshivali> Test-ApplicationAccessPolicy -Identity sreeharsha.admin@4development36.onmicrosoft.com -AppId aa22d846-a06a-4fc7-b4b3-7fdaba27c01c

RunspaceId      : 50cfbabc-3ac8-4eec-9b09-95a1a58f61d5
AppId           : aa22d846-a06a-4fc7-b4b3-7fdaba27c01c
Mailbox         : sreeharsha.admin
MailboxId       : e7c2d226-acaf-4939-9bb9-8adbcb40fd1
MailboxSid      : S-1-5-21-2314570782-56128764-747762702-19088025
AccessCheckResult : Granted

PS C:\Users\sshivali>
```

## Use Multi-Tenancy

If you're operating in multi-tenant environment, use these steps to enable multi-tenancy for the add-in.

### Register the Add-In for Multi-Tenancy

Here's how to register the add-in to use multi-tenancy:

1. Go to the [Enable Microsoft 365 Integration](#) topic. We'll use the same steps as in this topic, with some modifications to account for the multi-tenant use case.
2. In the Register the Oracle Add-In in Microsoft Azure section (Register an application page), instead of choosing **Single tenant**, select **Multitenant**.
3. Sign in to the Sales application as a setup user.

4. Navigate to **Setup and Maintenance > Manage Microsoft 365**. In the Outlook tab, enter the details for the Microsoft application. See the *Enable Microsoft 365 Integration* topic for more information.
5. Download the generated manifest file and share it with all of the subsidiary administrators.
6. Create the application consent URL and provide it to the subsidiary administrators. Here's an example of how to construct the URL:

```
https://login.microsoftonline.com/common/adminconsent?client_id=<ClientID>& state=12345&redirect
uri=https://<hostName>/sales/office365/jet/close.html&tenant=<TenantId>
```

See the Get Parameters for the URL section in this topic for details about how to get the parameters to construct the URL.

7. After the subsidiary administrators receive the manifest and consent URL, the subsidiary administrators need to upload the manifest from the Office 365 Admin page: <https://admin.microsoft.com/#/Settings/IntegratedApps>.
8. Next, the subsidiary administrators sign in to Office at: <https://outlook.office.com/owa/>, where they open a new browser tab and run the consent URL provided, and accept the consent.
9. After this, subsidiary users will start seeing the add-in in Outlook. They should be able to sign in and use the application.

**Note:** To decommission a subsidiary, delete all subsidiary users from Oracle Sales.

## Get Parameters for the URL

To get the Tenant ID and Client ID needed to construct the URL, go to the Azure portal, as shown in this section. Note that only Azure admins have the privileges to get this information.

### Host Name

The hostName is the Oracle Sales cloud instance name.

### Tenant ID

Go to: [https://portal.azure.com/#blade/Microsoft\\_AAD\\_IAM/ActiveDirectoryMenuBlade/Overview](https://portal.azure.com/#blade/Microsoft_AAD_IAM/ActiveDirectoryMenuBlade/Overview) and locate the Tenant ID.

### Client ID

Navigate to the **App Registration** page and look for the registered application. When you drill down to the application, you can see the Application (client) ID in the Overview section.

## Enable Your Add-in for Government Tenant Privileges

Microsoft 365 Government Community Cloud (GCC) is a Platform as a Service built on the Azure Commercial infrastructure. Microsoft 365 GCC is certified to FedRAMP High standards for cloud systems.

It meets the flowdown requirements of DFARS 7012 as of February 2021, all of which enable customers handling Controlled Unclassified Information (CUI) on behalf of the Department of Defense (DoD) to leverage the platform. See the *Microsoft 365 for Government* web page to learn more.

If your organization is on Microsoft 365 GCC, the add-in will be configured considering the GCC tenancy requirements. However, you need to indicate it in the add-in setup page.

Here's how you mark GCC tenancy for your add-in:

1. In the Setup and Maintenance work area, use the **Manage Microsoft 365** page:
  - o Offering: Sales
  - o Functional Area: Integrations
  - o Task: Manage Microsoft 365
2. On the left-navigation pane on the Manage Microsoft 365 task page, click the **Outlook** tab.
3. Under the **Set Up Outlook Integration** section, select the **Government Tenant** check box.
4. Click **Save and Close** to save your changes and close the page.

## Manage User Mappings

User mappings are critical for a user to sign in to the Oracle add-in. User mappings are combination of a user's Microsoft email ID and the Sales application user ID. If any of them change, users can experience sign-in issues.

To avoid this, you can update these mappings whenever you're informed about a change in either of them. Similarly, if a user is no longer active, you can remove the mapping.

Here's how you can review and update user mappings:

- Open the Microsoft 365 Monitor from the Manage Microsoft 365 page. You see a list of user mappings. Using the relevant options available, you can update or delete the user mappings shown in the list:
  - o **Update User Credentials:** Use this option to correct or update the Microsoft email ID or User ID in the sales application. To update, select the user mapping and select the **Update User Credentials** option from the Actions menu. Make the necessary changes and save.
  - o **Delete User:** When a user leaves your organization, his Microsoft email ID is obsoleted. To delete the mapping, select the user mapping and select the **Delete User** option from the Actions menu.

Note that only the user mapping between the Sales application user ID and Microsoft email ID is deleted. The user ID of sales application continues to be active. The next time a new user uses the sales application user ID, his Microsoft email ID is automatically mapped to this sales application user ID.

## Configure the Share Option on Appointments and Tasks

Your users use the Share Item button in the add-in to share contacts, opportunities, and appointments with the sales application. Based on your business requirements, you may want to show or hide the share option for appointments and tasks.

Here are the steps to configure:

1. In an active sandbox, open the CX Microsoft 365 Designer (**Sales application > Application Composer > Productivity Applications Setup > CX Microsoft 365 Designer**).
2. Click **Appointment** in the Home page.
3. Scroll down to **Feature Details** and turn on **Disable Share Flow** to hide the **Share Item** button on Appointments, for all the add-in users.
4. Do this for **Task** as well.



5. Save your changes.

**Note:** You can reverse this setting anytime. Come back to Appointment and Task in the Designer home page and turn off Disable Share Flow. This lets your users share appointments and tasks again in the sales application.

## Autosync the Email Responses of Manually Shared Emails

You can configure email sync so that replies received by users for previously shared emails get shared automatically with Sales.

Here are the high-level steps to enable this feature:

- Set the ORA\_ZCA\_ENABLE\_TRACKING\_EMAIL\_CONVERSATIONS profile option.
- Select the Enable Auto Capture of Email Responses check box in the Manage Microsoft 365 task page.

### Set the Profile Option

1. In the Setup and Maintenance work area, go to:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Administrator Profile Values
2. On the Manage Administrator Profile Values page, search for the profile option, ORA\_ZCA\_ENABLE\_TRACKING\_EMAIL\_CONVERSATIONS.
3. Set the profile to Yes at the Site level.
4. Save your changes.

### Enable the Autocapture of Email Replies

1. Navigate to the Synchronization Settings page: In the Setup and Maintenance work area, use:
  - Offering: Sales
  - Functional Area: Integrations
  - Task: Manage Microsoft 365
2. Under Email Sync, set the **Autocapture replies to shared emails** option to a yes value.
3. Save your changes.

The replies that user receive to previously shared emails are autosshared with the Sales application.

## Allow Updating of External Appointments

The salespeople who use Microsoft 365 add-in can share external appointments with the sales application. Even though the appointment is external to the company, you may want to let salespeople edit certain details, such as the account, opportunity, and lead.

Remember that the meeting details, such as day, time, description, and location, will still be read-only.

Here's how you can enable updating the external appointments:

1. In the Setup and Maintenance work area, use the **Manage Administrator Profile Values** task:
  - **Offering:** Sales
  - **Functional Area:** Sales Foundation
  - **Task:** Manage Administrator Profile Values
2. On the Manage Administrator Profile Values page, search for **External Appointments Editing Enabled** (ORA\_ZMM\_ENABLE\_EXTERNAL\_APPT\_EDIT) and set the **Site** value to **Yes**.
3. **Save and Close** the page.

**Note:** External appointments synced from Microsoft 365 should be linked to your sales data to allow for tracking and analytics.

## Configure Activity List by Job Roles

You can configure the add-in Activity list to appear based the job role of your users. For example, you can configure the Activity list so that salespeople can only log calls, but sales managers can log calls and create a call report.

From the Activity tab of the add-in home page, your users can do these actions by default:

- Create Appointment
- Create Task
- Create Call Report
- Log a Call

Let's see how to configure this:

1. In an active sandbox, open the CX Microsoft 365 Designer (**Sales application > Application Composer > Productivity Applications Setup > CX Microsoft 365 Designer**).
2. Click the hamburger icon and go to **Home > Side Panel > Activity List**.
3. Duplicate the standard layout to create your custom layout.
4. Do this in the custom layout:
  - a. Select the roles from the Assigned Roles list.
  - b. Under Activity List Actions, you can see all the default actions available. Keep the actions you want these roles to access and remove the others.
5. Save your layout.

**Note:** You can create separate layouts based on roles and the activities you want them to access.

## Enable Country-Specific Address Formats

Your add-in supports country-specific address formats which means, when your users create a new contact or account, the address fields relevant to the selected country appear. The country-based address fields are all available in a single field called Primary Address.

The Primary Address field is available only in the Edit layouts of the Contacts and Accounts pages. When you add this field to the Edit layout, your users can enter complete address of the contact or the account from the add-in.

Here's how you can add the Primary Address field to the Edit layout:

1. Ensure that you're working in an active sandbox.
2. In your sales application, go to CX Microsoft 365 Designer: **Application Composer > Common Setup > Productivity Applications Setup > CX Microsoft 365 Designer**.
3. Click the menu icon in the Microsoft 365 Designer.
4. Open Edit view of Accounts and create a new layout.
5. In the new layout, drag and drop 'Primary Address' from the Available Fields and save the layout.
6. Similarly, create a new layout for Contacts, add Primary Address field and save the layout.

**Note:** If you have existing custom layouts, then delete the old address fields and add Primary Address.

7. Click **Save**.

After adding Primary Address, the application moves details from your old address fields into the Primary Address fields, and country-specific address formats take effect. If users gave invalid address in older fields, the synchronization fails. However, users can resolve the sync issues by correcting the address details.

In the Detail layout of Accounts and Contacts, ensure that you add 'Address' field from the Available Fields section. This field consolidates the entire Primary Address details that users enter in the Edit view.

#### *Related Topics*

- [Sync Records Between the Sales Application and Microsoft 365 Outlook](#)

## Enable Advanced Sharing Mode

If you have made any task or appointment fields mandatory in your custom layouts, turn on the Advanced Sharing mode. This mode ensures that users don't miss entering information in mandatory fields.

Also, when this mode is on, the application shares users' emails or appointments beyond the ones that are under the Related Records tab.

Here are the steps to turn on Advanced Sharing:

1. Enter a sandbox and open Microsoft 365 Designer by going to **Application Composer > Productivity Applications Setup > CX Cloud Microsoft 365**.
2. Expand the side panel and go to **Related Records**.
3. Create a new layout and name it in a way that it indicates it's being used for 'Advanced Sharing'.
4. **Save** the layout.
5. Re-open the layout you just added.
6. In the layout details section, turn on **Advanced Sharing Mode**.
7. Save the layout.
8. Test your new layout and publish the sandbox.

## Configure Smart List Attributes

When a user clicks on the search icon in the dynamic choice list fields of the Microsoft 365 add-in without entering any search criteria, the add-in fetches a list of items using predefined parameters, such as recently created, updated, or visited records.

This list is called a smart list.

**Note:** Smart lists are generated based on interactions on sales application, Microsoft 365 add-in, and Mobile.

Smart lists are enabled on dynamic choice lists Accounts, Contacts, Opportunities, and Leads. There's no setup required for smart lists, but, you can configure the attributes you want your users to see for an item. Here's how you can do that:

1. Ensure that you're working in an active sandbox.
2. Go to **Navigator > Configuration > Application Composer**.
3. Select **Productivity Applications Setup** and then select **CX Cloud Microsoft 365**.
4. Open the **Picker** layout of an object, such as Account.
5. You can see the default attributes for that object. For example, you can see Primary Contact and Address for the Account object. You can remove attributes and add new ones.
6. Save your changes.
7. Go to the Configure Adaptive Search page and ensure that these attributes you added in the designer are enabled for Adaptive Search.

**Note:** If Adaptive Search isn't enabled on these attributes, users see a blank space in place of these attributes in the smart list.

## FAQs for Microsoft 365

### Frequently Asked Questions (FAQs) for Microsoft 365

This section contains the most frequently asked questions (FAQs) when setting up and maintaining Microsoft 365. Scroll or search to find answers to common questions.

### Why do users have issues signing in to the add-in from the Outlook desktop client?

If your users have sign-in issues only with the desktop version of Outlook, they may have to update to a version supported by the add-in. See the System Requirements for Outlook Applications for more information.

## Why can't my users share meetings or email with the sales application?

If your users report issues with sharing meetings or emails, verify the status of activities related to these business objects and enable them. For example, if your users are facing issues with sharing emails, verify if an activity for Email exists.

This activity must be in the Manage Activity Type and Subtype task in the Setup and Maintenance work area. Ensure that Appointments, Call Reports, and Tasks check boxes are turned on for that activity and set a start date. If you don't find one, add an activity with the Name and Code as 'Email' and enable the check boxes. Save the activity. Do the same if your users have issues with sharing appointments and other business objects as well.

## My users can't find an item they're looking for, even though Adaptive Search is enabled. Why?

These are the possible reasons your users can't find an item they're looking for:

- If the field your user is searching on is available in the other add-in pages, but you haven't enabled these fields to be searchable for Adaptive Searches, then users can't search by these fields. Turn on Adaptive Search and keyword search on those fields.
- If Text search isn't enabled on a field, such as the Comments field, and your users are trying to perform a text search on that Comments field, they can't get their desired result. Turn on the check box called 'Analyzed Text Search' for that Text field.
- The field your users are searching on isn't supported by Adaptive Search, and thus isn't searchable. For example, the Favorites attribute on the Contacts object isn't supported for Adaptive Search.
- If your users have read-only access or they don't have access rights to the data being searched, they can't find the desired results.

## My users say the smart list isn't showing any results. How can I fix this?

If your users have been actively updating or creating account, opportunity, or contact records in the sales application, then the smart list appears based on the user context.

**Note:** Smart lists are based on sales application interactions only. Microsoft 365 add-in interactions don't contribute to the smart list.

However, just to ensure that the latest feed is captured, run the Generate Relevancy Feed scheduled process in the sales application.

**CAUTION:** This scheduled process is part of Adaptive Search. If you run it, the process may affect all sales application fields and not just the Microsoft 365 add-in fields. To run this scheduled process:

1. In the sales application, go to **Tools > Scheduled Processes**.
2. Click **Schedule New Process**.
3. Search for the process, Generate Relevancy Feed.
4. Click **OK** to run the process.

## Why isn't the field I exposed in the Designer available in the Adaptive Search configuration page?

Sometimes the names of the fields you see in Microsoft 365 Designer and the corresponding fields in Adaptive Search don't match exactly. To ensure that smart lists display attributes correctly, make sure the designer fields and Adaptive Search fields are equivalent.

Do this before you enable the attributes or fields for Adaptive Search.

## Why couldn't my user delete an opportunity contact?

Your user with the Sales Representative job role, must own the opportunity and the associated account to delete the contact related to it. If you have changed the configurations related to the job role, ensure that the job role includes the Delete Opportunity privilege.

## How can I unblock a user whose access is blocked because of signing in from another user's computer?

In such scenarios, both the users are blocked from signing in to the Microsoft 365 add-in. Delete the users from the synchronization log to unblock the users. Here's how:

1. In the Setup and Maintenance work area, use:
  - **Offering:** Sales
  - **Functional Area:** Integrations
  - **Task:** Manage Microsoft 365
2. On the task page, click **Microsoft 365 Monitor**.
3. On the Microsoft 365 Monitor page, select the users.
4. Click **Actions** and select **Delete the User**. Ask the users to sign in to the add-in again.

## Why isn't the invitee's decline response shared with the sales application?

When an invitee shares a meeting with the sales application, Microsoft provides only the Microsoft ID (MS ID) and not the iCalUID of the meeting. So, looking up an invitee's decline response isn't possible because the iCalUID isn't available. Also, the add-in doesn't track the MS ID of all the invitees.

**Note:** The invitee response of the meeting shared with the sales application is read-only for the organizer. The organizer can't change the response in the sales application.

## How can I configure required fields for a contact address?

Use the Manage Address Formats task to configure required address fields for contacts.

1. In Setup and Maintenance, use the **Manage Address Formats** task:
  - o Offering: Sales
  - o Functional Area: Accounts and Contacts
  - o Task: Manage Address Formats
2. On the Manage Address Formats page, select a country from the **Country** list and click **Search**.
3. Select the postal address format if multiple formats are available and click **Edit**.
4. Select the **Required** check box for the field.
5. Click **Save and Close**.  
Sign in again in the Microsoft 365 add-in for the changes to take effect.

## How can I reinstate the add-in that isn't showing up on my Outlook?

Try the recovery steps provided here to reinstate the add-in:

1. Reinstall Outlook and add the add-in. If you still can't see the add-in, then try the next step.
2. Verify the settings in the Microsoft admin center.
  - a. Set the deployment method in the Microsoft 365 admin center to **Available**.
  - b. Ensure that you have same user accounts in the add-in configuration in the Microsoft 365 admin center and the Outlook Office account.

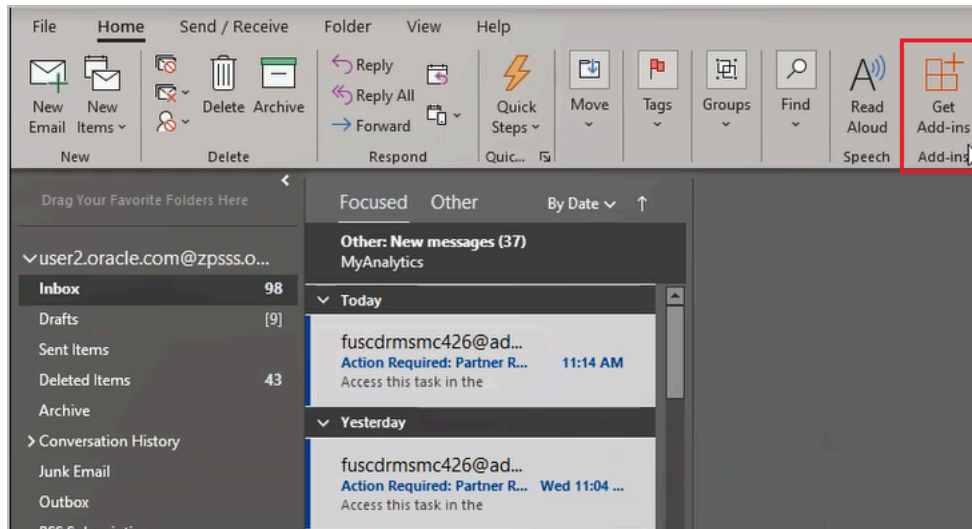
Let's see the recovery steps in detail.

### Reinstall Outlook and Add the Add-In

1. Uninstall Outlook from your computer.

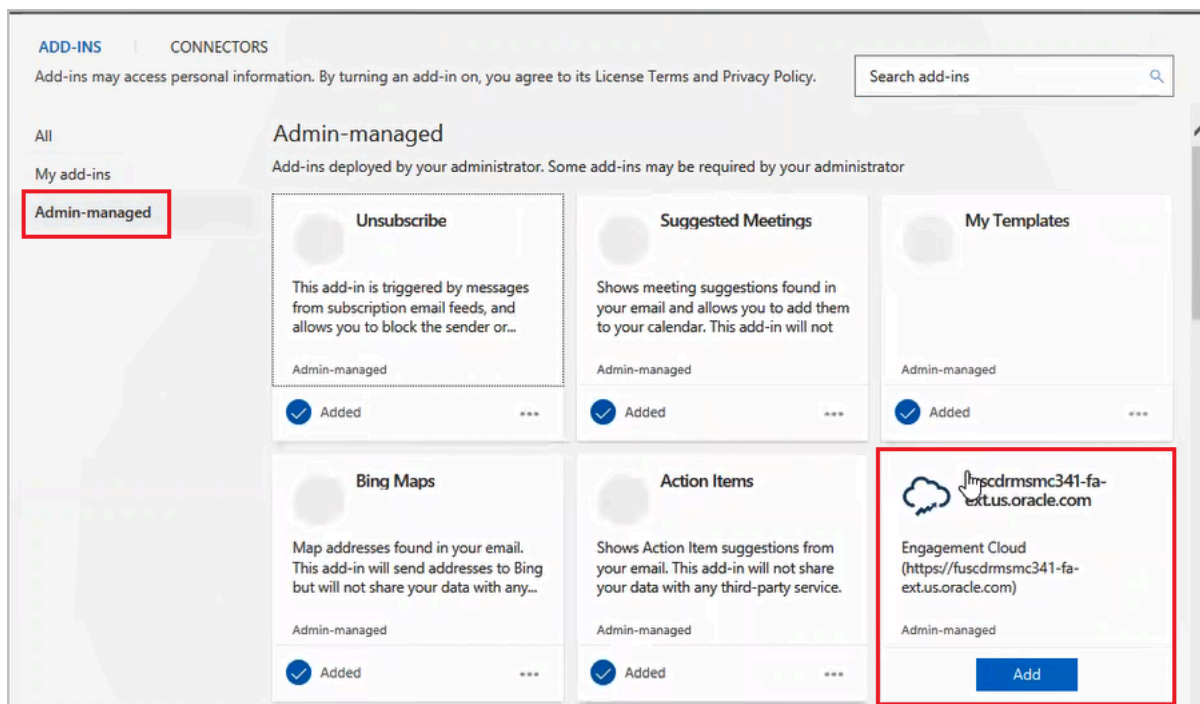
2. From Microsoft's portal, download the supported version of Outlook mentioned on the Oracle Application Requirements page.
3. Open Outlook.
4. On the **Home** ribbon, click **Get Add-ins**.

Here's the screen shot of a sample Outlook Home page that shows the Get Add-ins option:



5. On the Add-ins window, go to **Admin-managed** and check if the Oracle Microsoft 365 add-in is available in Outlook.

The screenshot below shows an example Oracle Microsoft 365 add-in in the Admin-managed tab.





6. Click **Add**.

The add-in appears on the Home ribbon.

7. Click the add-in to open it as a side panel on Outlook.

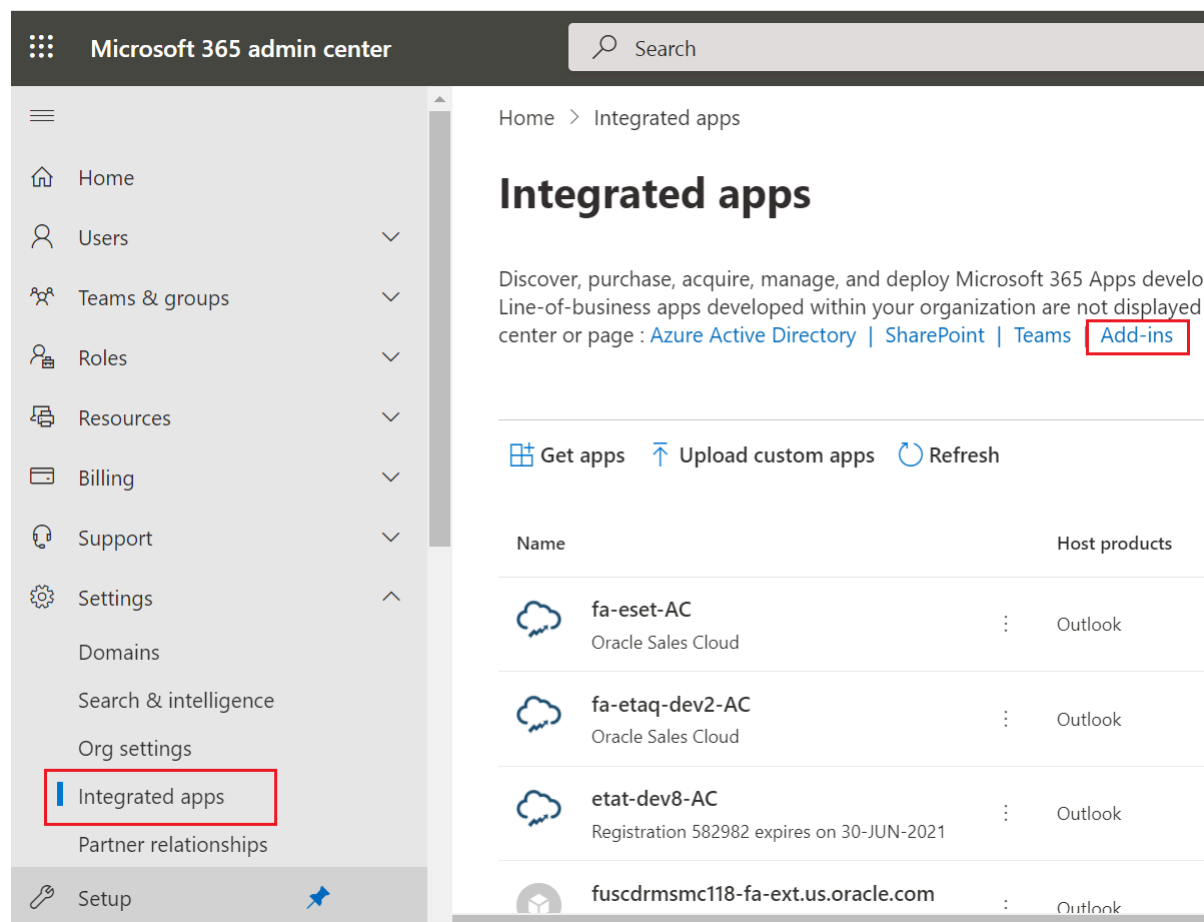
If you can't find the add-in yet, try the next recovery step: Verify the settings in the Microsoft admin center.

## Verify the Settings in the Microsoft Admin Center

Ensure that the add-in configuration is available instead of being optional in the Microsoft 365 admin center.

1. Sign in Microsoft 365 admin center.
2. Click **Integrated apps** from the navigation pane.
3. On the Integrated apps page, click **Add-ins**.

The screenshot below shows navigation to Add-ins from Integrated apps page of Microsoft 365 admin center.

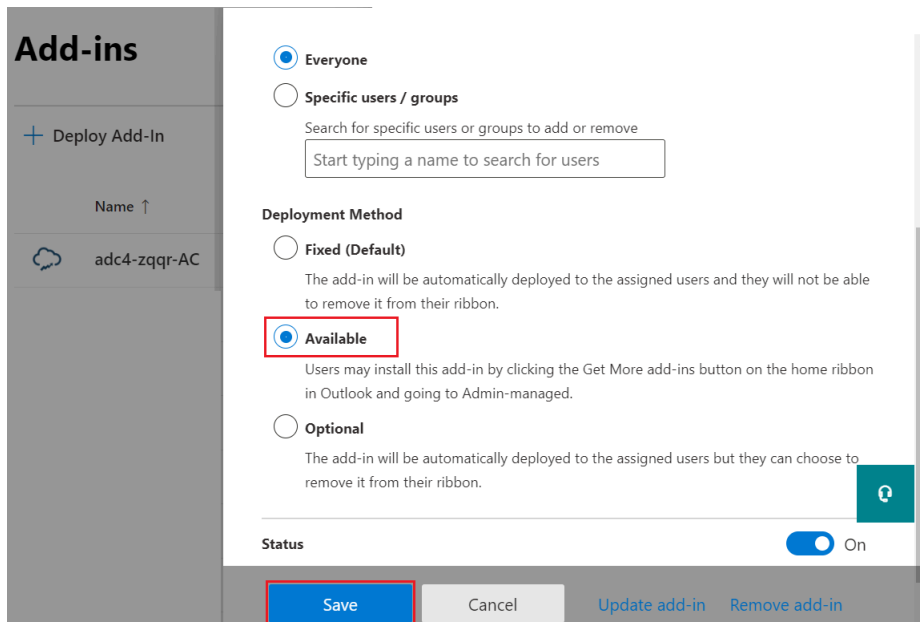


4. Select the add-in.

The Edit add-in page appears.

5. Change the **Deployment Method** to **Available** and click **Save**.

The screenshot below shows the Add-ins page edit mode, where you can set the deployment method to available.



6. When deploying for specific users or groups, add the same user accounts to the Microsoft admin center and the Outlook Office account.

#### Oracle Sales Cloud

##### Assign Users

Choose which users will have access to adc4-zqqr-AC

☐ Everyone

☒ Specific users / groups

Search for specific users or groups to add or remove

Start typing a name to search for users

4 4DEVELOPMENT36 × AC Admin Configurator ×

HA Helen Admin × AT Automation Tester × AU Ansal User ×

7. Next, open Outlook.
8. On the **Home** ribbon, click **Get Add-ins**.
9. On the Add-ins window, go to **Admin-Managed** and check if the Oracle Microsoft 365 add-in is available in Outlook. See the Reinstall Outlook and Add the Add-in topic for the screenshots.
10. Click **Add**.

The add-in appears on the Home ribbon.

11. Click the add-in to open it as a side panel on Outlook.

**Note:** If you don't see the add-in yet, contact Oracle Support and share the screenshots of the following:

1. The Admin-managed window in Outlook.
2. The add-in configuration in the Microsoft admin center.

## How can I show service requests in the add-in?

You can show only the open critical service requests on the add-in. Here's how:

1. Navigate to **Configuration > Application Composer > Productivity Applications Setup > CX Sales for Microsoft 365**.
2. On the Microsoft 365 Designer, click the menu (hamburger icon) and expand **Service Requests**.
3. Duplicate the standard layout.
4. Drag and drop **Critical** from the **Available Fields**.
5. Click **Save** so that **Critical** shows up on the selected layout of service request in the add-in.

## How can I see the Party ID of the Sales owner of a contact?

You can see the PartyID of the Sales owner of a contact using Microsoft 365 Designer.

1. Enter a publishable sandbox.
2. In Application Composer, expand **Contacts** and click **Fields**.
3. Create a formula field of type Text with the API Name of `contactPartyId`, a DisplayLabel of `Contact Party Id`.
4. Check **Include in Service Payload**, and then use this Groovy script: `if(PartyId) return PartyId;`
5. Save your work.
6. Navigate to **Productivity Applications Setup > CX Sales for Microsoft 365**.
7. In the Microsoft 365 Designer, expand **Contacts**
8. Duplicate the standard layout.
9. Drag and drop **PersonDEO\_ContactPartyId\_c** from the Available Fields onto the custom layout.
10. Save your changes.
11. Contact Party ID appears in your Contacts custom layout in the add-in.
12. Publish the sandbox according to your company's business practices.

## How can I see the PartyID of a contact?

PartyID is not available by design in the Microsoft 365 Designer, but you can expose it.

1. In a sandbox, navigate to Application Composer.
2. Expand the **Contact** object and click **Fields**.
3. Create a Formula Field of type Text with these values:
  - DisplayLabel: Contact Party ID
  - Name: ContactPartyId
  - Include in Service Payload: Checked
  - Expression - use this Groovy script: `if(PartyId) return PartyId;`

4. Save your changes.
5. In Application Composer, navigate to **Productivity Applications Setup > CX Sales for Microsoft 365**.
6. In the Microsoft 365 Designer, expand **Contacts** and click **Details**.
7. Duplicate the standard layout.
8. Drag and drop **Contact PartyID** from the Available Fields onto the custom layout.
9. Save your changes.
10. Contact Party ID appears in your Contacts custom layout in the add-in.
11. Publish the sandbox according to your company's business practices.

#### *Related Topics*

- [Create and Activate Sandboxes](#)

## Microsoft Teams

### About Microsoft Teams

Use Microsoft Teams to further advance your sales pipeline by allowing salespeople to collaborate on their opportunities.

Directly from the Opportunities UI, salespeople can simply click the action to add all existing members of the opportunity to a team in Microsoft Teams and start the collaboration.

Users of Microsoft Teams can interact with opportunity team members from Sales, as well as add required external resources with expertise to help win the deal. As an administrator, you manage the Oracle Microsoft Teams integration for your users. See the [Set Up Microsoft Teams for Sales](#) topic for steps.

### Prerequisites for Microsoft Teams Setup

To enable a Sales user to collaborate with a user's account in Microsoft Teams, you must ensure that the user's resource email address (that's the email address in the resource record for the user) in CX Sales matches the user's email address in Microsoft Teams.

In addition, the opportunity owner must be a Microsoft Teams user and be the owner of the team in Microsoft Teams.

You must set the value of the Territory Based Resource Assignment Style profile option (MOO\_OPTY\_RESOURCE\_TBA\_STYLE) to specify if all members of the territory should be added to an opportunity team or just the owner. The default is to add all members to the opportunity team.

#### *Related Topics*

- [How can I collaborate on Opportunities using Microsoft Teams?](#)

## Set Up Microsoft Teams for Sales

As an administrator, you manage the Oracle Microsoft Teams integration for your users.

Here's how to complete the setup:

1. Create the add-in in Microsoft Azure Active Directory (AD):
  - a. Create the application for the Microsoft Teams add-in.
  - b. Configure the application.
2. Set up in Oracle Sales:
  - a. Enter the application ID, application key and tenant ID for Microsoft Teams on the Manage Microsoft 365 task page.
  - b. Use Application Composer to add the **Create Team in Microsoft Teams** and **Go to Microsoft Teams** action items to the Edit Opportunity page.

## Create the Microsoft Teams Add-In

To create the Microsoft Teams add-in, get your host URL and follow these steps:

1. Sign in to the Microsoft Azure portal at <https://portal.office.com>.
2. Click **Admin** on the home page.

The Admin center page appears.

3. Click **Azure Active Directory** in the **Admin centers** list.

The **Azure Active Directory Admin Center** page appears.

**Note:** If you're a first-time user, then you must sign up for your Microsoft Azure Active Directory.

4. Select **All service** and then **Azure Active Directory**.

The details page corresponding to the active directory appears.

5. Click **App registrations**.

The Applications list page appears.

- a. Click **+ New registration**.

The Register an application dialog box appears.

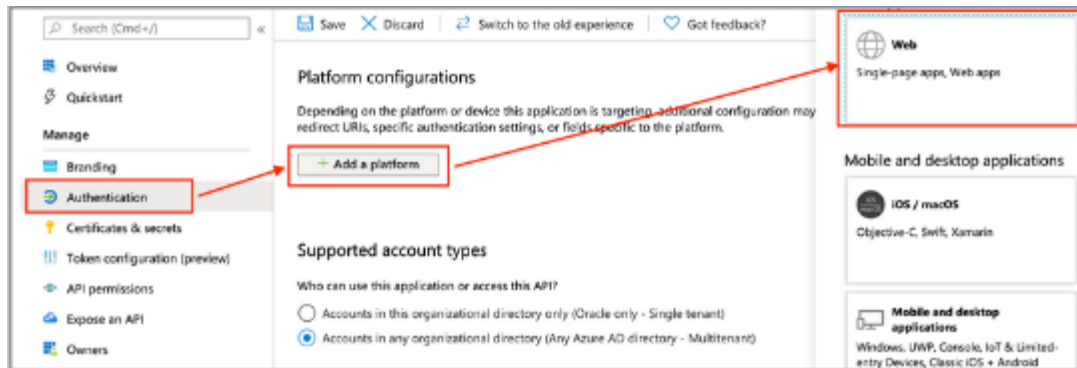
- b. For Name, enter a name for the application, for example, **Microsoft Teams Collaboration**.
- c. Under Supported account types, select **Accounts in this organizational directory only (Oracle only - single tenant)**.
- d. Leave Redirect URI (optional) blank.
- e. Click **Register** to create the Microsoft Teams add-in application.

The application appears on the App registrations page.

6. The Application details page displays the Application (client) ID and Directory (tenant) ID.

**Note:** Keep a note of these values because you insert these in the Manage Microsoft 365 task page later on. See *Register Microsoft Teams for Sales* for more information.

7. Next click **Authentication** and from the Authentication page, click **Add a platform** and select **Web** as shown in this screenshot:



8. Under the Enter Redirect URIs section, enter the Uniform Resource Identifier, for example, `http://localhost:3000/auth/callback`).
9. In the Implicit grant section, select **Access tokens** and **ID tokens**.
10. Click **Configure**.
11. Next click **Certificates & secrets**, and from the Add a client secret section, click **+ New client secret**.

Select a duration for the expiration of the Client Secret. For example, if you select **12 months**, the Client Secret becomes invalid after 12 months, and the automatic refresh stops. The sync process will start only after you sign in to the client again.

If you select **Custom**, enter the start and end dates, which must be within 24 months. After the end date, you must sign in to the client again, to start the sync.

12. Click **Save**.

The application generates a value for the key. Keep a note of this value because you will use this as the Application Key in the Manage Microsoft 365 task page later on.

13. Click **API permissions** and click **Add a permission**. The **Request API permissions** pane appears.
14. Scroll to the bottom of the pane and click **Microsoft Graph Commonly used Microsoft APIs**.
15. Click **Application permissions** and select the following permissions:

- `Directory.Read.All`
- `Directory.ReadWrite.All`
- `Group.Read.All`
- `Group.ReadWrite.All`

16. Click **Add permissions**.
17. Click **Grant admin consent for Oracle** and then click **Yes** on the confirmation dialog box.

#### Related Topics

- [Enable Microsoft 365 Integration](#)

## Register Microsoft Teams for Sales

Use the Manage Microsoft 365 task to register the Microsoft Teams in the Microsoft Azure Directory:

1. Enter the **Application ID**, the **Application Key**, and the **Tenant ID**. See *Set Up Microsoft Teams for Sales* for information about how to generate these details.

Let's say you enter the name as Oracle Microsoft Teams Collaboration. When you sign in to your Microsoft 365 account, you can see Oracle Microsoft Teams Collaboration as an add-in that you can select.

2. The first time you set up the integration, a usage agreement notice displays for your information:  
Usage Agreement: This Oracle-Microsoft integration or plug-in may enable you to link to or transmit your content or third-party content to, or otherwise access, or retrieve content from, Microsoft and its platforms, users, or services. Oracle doesn't control and isn't responsible for Microsoft sites or platforms or services, the performance or availability of the services, or any content received or sent. You bear any and all risks associated with access to and use of Microsoft sites, platforms, and services and are solely responsible for entering into and compliance with separate terms between you and Microsoft. Oracle isn't responsible for the security, protection or confidentiality of such content (including obligations in the Hosting and Delivery Policies and Data Processing Agreement and Oracle's Privacy Policy) that's transmitted to such Microsoft sites or platforms or services. You're solely responsible for obtaining or having any required consents or other legal basis for your use of this integration or plug-in. Oracle reserves the rights to terminate your connection or integration if your use of this integration or plug-in violates the terms of your Agreement(s) with Oracle.

## Add Actions for Microsoft Teams to Opportunity and Business Plan Actions Menus

On the opportunities and business plans Actions menus, enable actions for Microsoft Teams. This lets your salespeople create collaborative teams with users of Microsoft Teams while working on an opportunity or a business plan.

Add these two actions to the Opportunity and Business Plan details layouts using Application Composer:

- **Create Team in Microsoft Teams:** This action helps salespeople create a team for the opportunity or business plan right from that object's details page. After the team is formed, the button automatically changes to Go to Microsoft Teams.
- **Go to Microsoft Teams:** This action lets salespeople navigate to the team created in Microsoft Teams.

Here's how you add the actions:

1. In an active sandbox, use the navigator to go to **Configuration > Application Composer > Objects > Standard Objects**.
2. To add the actions to the Opportunity Details layout, expand **Opportunity** and click **Pages**.
3. In the Application Pages tab of the Details Page Layouts region, duplicate the standard layout by selecting the standard layout and clicking the **Duplicate** icon.
4. Type a new layout name and click **Save and Edit**.  
The custom layout page appears.
5. On the custom layout, click the pencil icon next to **Actions**.
6. From the **Available Actions** list box, move these two actions to the **Selected Actions** list box:
  - **Create Teams in Microsoft Teams**

- **Go to Microsoft Teams**

7. Click **Done**.
8. To enable these actions for business plans, add the actions to the Business Plan details layout. On the left navigation pane, expand **Business Plan** and click **Pages**. Repeat steps from 3 to 7.
9. Publish the sandbox.

The Microsoft Teams actions appear on the details pages for opportunities and business plans.

#### *Related Topics*

- [How can I collaborate on Opportunities using Microsoft Teams?](#)

## Archive Teams Associated with Closed Opportunities

When an opportunity closes in Sales, the team associated with the opportunity may not need to collaborate any longer. You can set up the sales application to automatically archive such teams you created in Microsoft Teams.

Only teams associated with closed opportunities are auto-archived. An opportunity is considered closed when the opportunity status belongs to one of these status categories:

- Lost
- No Sale
- Won

Moreover, when an opportunity is reopened in Sales, the associated team in Microsoft Teams is automatically restored. An opportunity is considered open when the opportunity status is set to a category that means Open.

To learn more about the opportunity statuses, see the [How do I modify sales statuses?](#) topic.

### Auto-Archive Teams

To enable auto-archiving, do these two setups:

1. Activate Common CRM Signals.
2. Enable the archive option for Microsoft Teams.

#### Activate Common CRM Signals

1. In the Setup and Maintenance work area, go to:
  - **Offering:** Sales
  - **Functional Area:** Sales Foundation
  - **Task:** Manage Administrator Profile Values
2. On the Manage Administrator Profile Values page, search for the profile option name, **Common CRM Signals Active** (ORA\_ZCA\_ENABLE\_SIGNALS).
3. Set the Site value to **Yes**.
4. Click **Save and Close**.

#### Enable the Archive Option for Microsoft Teams

1. In the Setup and Maintenance work area, go to:



- **Offering:** Sales
  - **Functional Area:** Integrations
  - **Task:** Manage Microsoft 365
2. On the Manage Microsoft 365 page, go to the **Microsoft Teams** tab.
  3. Select the **Archive Opportunity Team in Microsoft Teams Enabled** check box.
  4. Click **Save and Close**.

If you haven't set up Microsoft Teams already, go through the steps provided in the topic, *Set Up Microsoft Teams for Sales* and complete the setup. After that, enable the archive option so that when an opportunity closes, the corresponding Microsoft team gets archived automatically.



# 39 Mobile

## Overview of CX Sales Mobile

The Oracle CX Sales Mobile app helps your users manage their day effectively and develop customer relationships using their phone or tablet.

Read the following sections to learn more.

To begin implementing Mobile, start with [Overview of CX Sales Mobile Setup](#).

## Manage Sales Activities

Sales teams can manage Sales activities. Here are the highlights:

- Use the action-driven, configurable home page that contains a sales briefing, letting salespeople track the sales pipeline and stay on top of daily activities.
- Leverage optimized task-based flows for key sales functions: Accounts, contacts, leads, opportunities, activities, assets, service requests, partners, and custom objects.
- View, create, and edit tasks, appointments, and call reports.
- Saved searches that are shared across CX Sales Mobile and Workspace lists, for consistency across applications.
- View your recently accessed records in the app when using the global search, or when sharing notes from an external app.
- Add contacts and leads to CX Sales Mobile from the mobile device's address book.
- Create contacts and leads by using a photo of a business card.
- Scan an asset's bar code to search for an asset and automatically enter the asset serial number.
- Share notes, photos, videos, documents, or files from mobile to Sales accounts, opportunities, or other records.
- Plan your sales activities around your current location by viewing your nearby contacts, accounts, opportunities, and leads plotted on an interactive map. You can also plan future appointments in a city or near an address with an easy location search.
- View your quotes in the app and stay updated on the quote status. View and send quote proposal documents to customers, or share them with your team for feedback.
- View reports and analytics with modern visualizations optimized for mobile displays, such as bar graphs, funnels, bubble charts, and more. Role-based layouts let sales administrators provide unique experiences to salespeople, managers, and others.

## Manage Partner Relationship Management Activities

Partners can manage Oracle Partner Relationship Management activities:

- Partner users can effectively manage and improve channel sales on-the-go.
- Channel Managers can track overall channel sales and also easily manage partners, partner contacts, and related information.
- Partner role-based restriction features let you configure the app according to your business requirements.

## Oracle Sales Assistant Chatbot

Integrate with the Oracle Sales Assistant chatbot to get these features:

- Oracle Sales Assistant helps salespeople perform their daily sales-related tasks. Using their phones, they can type or use their voice to ask questions, and the sales assistant retrieves the information or acts on the requests.
- Sales Assistant reduces manual data entry and makes it easier to view and update sales records using voice commands or typing.

**Note:** If you need help enabling the Sales Assistant, send us a message on the [Sales Assistant forum](#) on Oracle Cloud Customer Connect.

## New Design for Efficiency on the Go

Take advantage of these new design for efficiencies on-the-go:

- Modern and intuitive user experience, designed to boost productivity with fast and seamless interactions.
- At-a-glance record views for a quick grasp of summary, key, and related information.
- Access contextual actions everywhere for fast and easy record updates.
- Improved picker experience powered by Adaptive Search.

## Global Search

These global search features make finding records efficient:

- Fast and simple search across all objects in one place.
- Use the multi-keyword search across multiple fields for faster and easier access to information.
- Search more easily with recent searches and type ahead results that display results as you type.
- Filter search results by object types.

## New and Improved Sign-In Experience

This version of the mobile app has a new and improved sign-in experience:

- Scan a QR code to sign in easily using your single sign-on credentials or using basic authentication.
- Use face or fingerprint recognition to securely sign in to the app.
- View new configurations with fast download and instant activation of your configurations.
- Enable OAuth authentication token support to let users stay signed in to the app for longer.

## Use a Phone or Tablet

Use either a phone or tablet to access the app. Using a tablet changes the display to 2x portrait mode.

## Easy Configuration

Implement Mobile using these easy configuration aspects:

- Configure the app using the new interface designer.
- Create criteria for page layouts for both standard and custom objects.
- Download your configurations to the app quickly and easily. Mobile automatically signs you in to the correct sandbox without restarting the app.
- Create custom scripts that enforce custom validations and business logic for both top-level parent and child objects.

## Use Offline

Salespeople can use Mobile in offline mode when they're not able to be online:

- View and edit Sales data in areas with no network connection.
- Sync automatically when a connection is re-established.



# 40 Import and Export

## Overview of Import and Export

You can use Oracle's import and export tools to import and export a wide range of application data.

For example, you can import records for sales business objects into the applications so that you don't have to create the records in the UI.

## Options for Importing Data Into Your Application

Here's an overview of the multiple ways you can import your data from a file or directly from an external application. Which import method you use depends on the type of data you're importing, the volume of data, and technical requirements. If you're integrating your sales application with other cloud services, then you may be required to use additional import methods not covered here.

Whichever import method you use, you must make sure that any prerequisite records already exist in the application. For example, if you're importing contacts for an account, then the account must already exist in the application. If you're importing data that depends on other data, then the prerequisite import process must complete successfully before you start the dependent process.

| Import Method | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | When to Use                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | How to Access                                                                                                                                                                                                  | Where to Get More Information                                                            |
|---------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|
| Import Macros | <p>The Excel macros speed up and simplify the import of up to 5,000 records at a time for some objects. The macros help you by validating your data entries, providing lists of values, and automatically populating constant values.</p> <p>The macros create data files that are imported automatically.</p> <p>Macros are available to import the following types of sales information:</p> <ul style="list-style-type: none"> <li>Sales users</li> <li>Products</li> <li>Product groups</li> <li>Accounts and the account hierarchy</li> </ul> | <p>Use the import macros for importing data in your initial deployment.</p> <p>The macros are targeted to the simple proof of concept sales automation use case covered in this guide. For example, the import macros assume that you're importing account, contact, and lead records for one country at a time.</p> <p>The macros generate log files of the actual data that's imported, including the values populated for you. The log files can serve as a learning tool for more complex import.</p> | You can download the Excel macros and any required mapping files from the Oracle CX Sales: Getting Started with Your Sales Implementation: Import Macros (Document ID 2229503.1) article on My Oracle Support. | The different chapters in this guide provide detailed instructions for using the macros. |

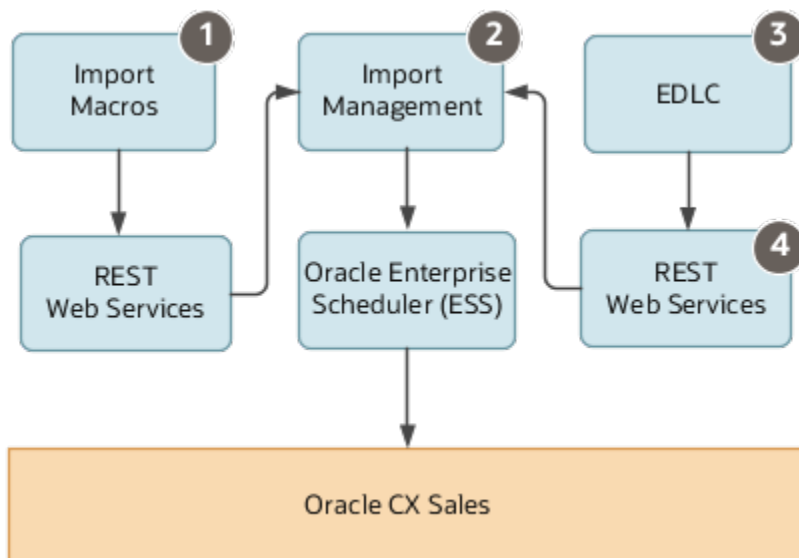
| Import Method               | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | When to Use                                                                                                     | How to Access                                                                                                                                                                                                                                                             | Where to Get More Information                                                                                                                                                                          |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                             | <ul style="list-style-type: none"> <li>• Contacts</li> <li>• Leads</li> <li>• Opportunities</li> <li>• Opportunity revenue lines</li> </ul>                                                                                                                                                                                                                                                                                                                                                                                               |                                                                                                                 |                                                                                                                                                                                                                                                                           |                                                                                                                                                                                                        |
| Import Management           | <p>Use Import Management to import data files (.csv) with up to 50,000 records.</p> <p>Import Management improves definition, error handling, and performance. For example, you can drag and drop attributes while creating import mappings. The import also validates the first ten records in your data file before you import the rest. You don't have to wait around to see if your data meets the import requirements.</p> <p>Import Management supports import for all sales objects and the majority of other objects as well.</p> | Use Import Management for importing data .                                                                      | Click <b>Import Management</b> in the Navigator.                                                                                                                                                                                                                          | See the <i>Understanding Import and Export Management</i> guide for instructions on using the import.                                                                                                  |
| External Data Loader Client | <p>The data loader is a command-line tool you can use to import high-volume data files. The tool supports the same objects as Import Management.</p> <p>The tool automatically splits a large data file into multiple smaller files to adhere to the application's import volume limits, and enables the tracking of import status.</p>                                                                                                                                                                                                   | Use this import method for importing very large data files for the same objects supported by Import Management. | You can download the client from Oracle Support Document 2325249:1 (External Data Loader Client) on My Oracle Support.                                                                                                                                                    | <p>Instructions for using the client are available in the document and in the client itself.</p> <p>For REST API documentation, see the <i>REST API for CX Sales and B2B Service</i> guide.</p>        |
| Web Services                | Web services let you Import data directly from other applications. You can manage Import Management imports using REST web services.                                                                                                                                                                                                                                                                                                                                                                                                      | Use web services to manage import jobs if you need to import directly from an external application.             | <p>Public APIs are available for Import Management and REST services.</p> <p>The REST services include the following:</p> <ul style="list-style-type: none"> <li>• Import Activities</li> <li>• Import Activity Maps</li> <li>• Import Export Objects Metadata</li> </ul> | <p>For REST API documentation, see the <i>REST API for CX Sales and B2B Service</i> guide.</p> <p>For SOAP API documentation, see the <i>SOAP Web Services for CX Sales and B2B Service</i> guide.</p> |



| Import Method      | Description                                                                                                                                                                                                                                                                                                                                                      | When to Use                                                                                                                                                                                                                                   | How to Access                                                                                                                                                                                                                                                                                                                                      | Where to Get More Information                                                                  |
|--------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------|
| High-Volume Import | <p>An import mode available in both REST web services and in the External Data Loader Client that is designed to import millions of records at a time. High-Volume Import is available for the following objects:</p> <ul style="list-style-type: none"><li>• Account</li><li>• Asset</li><li>• Contact</li><li>• Hierarchy</li><li>• Hierarchy Member</li></ul> | <p>Use this import mode for importing very large number of records for the set of available objects. You can't use this mode with any custom import logic that you added, including Oracle workflows, ICS triggers, or custom validation.</p> | <p>You can access High-Volume Import either using REST services or using External Data Loader Client.</p> <p>When importing using REST, set the "High-volume" attribute to enable High-Volume Import.</p> <p>When importing using the External Data Loader Client, set the command-line parameter "-high-volume" to enable High-Volume Import.</p> | <p>For REST API documentation, see the <i>REST API for CX Sales and B2B Service</i> guide.</p> |

Here's a diagram that illustrates the different import methods:

- The import macros (callout 1), Import Management (callout 2), and the External Data Loader Client (callout 5) all use the same Oracle Enterprise Scheduler processes for import. When you import very large files using the EDLC client, the REST web services (callout 4) create multiple processes to respect the Import Management file size limit.
- If you need to import from an external application, then you can use the REST web services directly.



# Overview of the Import and Export Management Framework

Oracle's Import and Export Management framework provides a great mechanism to import and export data with these benefits:

- Ease of use: Streamlined UIs, drag and drop mapping, and pre-execution validations
- Integrated: REST and command-line APIs for job definition, invocation, and monitoring
- Consistency: Object definitions that are same throughout the application (import, REST, UI, App Composer), including parent-child structures
- Configuration: Supports custom business logic and events
- Improved debugging: Easier issue diagnosis, analyzes up to the first 10 rows of your source file for validation of data type constraints, and required fields
- Performance: Improved performance with much less import time for high-volume data. Data migrations can be configured to process millions of records per hour
- Flexibility: Can support jobs of all sizes and high-volume onboarding and initial data loads

For more information about using Import and Export Management, see the *Understanding Import and Export Management for CX Sales and B2B Service* guide.

You can use REST services to integrate Import Management with an external scheduler, run recurring import jobs, define and execute import/export activities, manage maps, and introspect object metadata. The Use Cases section in the *REST documentation guide* has more information about how to use REST services with Import Management.

# 41 Configuring, Extending, and Integrating Sales

## Overview of Extending the CX Sales Applications

Oracle CX applications offer many different ways to configure, extend, and integrate its services, components, and modules.

Here are just a few of the capabilities:

- Modify objects and user interfaces (UIs).
- Change the appearance and theme of the UIs.
- Configure the Home page by adding announcements and changing navigation.
- Change the structure of the springboard and modify the Navigator.
- Modify the help configuration.
- Create interactive guides to help your users learn about the applications.
- Access a rich set of subject areas around which to build your own reports.
- Configure reporting dashboards by adding new reports or changing the layout.
- Create copy maps to map fields or add information between copied business objects.
- Configure security components.
- Use web services to integrate the services.
- Export data, modify it, and then import it back into the services.
- Integrate with other applications to enhance the functionality, including synchronizing Financials Accounts to the sales applications.

**Note:** For more information about configuring online help, see the *Common Components* chapter.

## Modify Pages and Change Text

Use Oracle's configuration tools, Application Composer and Page Composer, to modify application pages. Use the strings editor to modify text in the application pages.

For example:

- Create a new object and related fields, then create new pages where that object and its fields are exposed to users.
- Add tabs hidden by default to application pages.
- Edit the UI at runtime by showing or hiding fields and tables.
- Change the order of regions, or change a dashboard page layout.

- Change the default text in the UI, for example, by replacing a term with another term throughout the applications.

## Map Fields Between Applications

Copy maps are default mappings of fields between objects. For example, when you convert a lead to an opportunity, the application uses the copy map defined for the Lead and Opportunity objects to determine what to name the leads fields that are carried over to the newly created opportunity. Using Oracle Application Composer, you can create copy maps for several sales business objects, thus allowing you to control the mapping.

Here are some use cases:

- Create maps to change the default mapping between fields when:
  - Leads and opportunities are copied from responses
  - Opportunities are created from leads
  - Opportunities are created from partner deal registrations
  - Opportunities are copied from existing opportunities
- Use Groovy scripting to include information about the lead on a new opportunity converted from a lead.

## Integrate Applications with Web Services and Use Import and Export

You can use web services to integrate with your external applications. You can also use import management to import and export large amounts of data into and out of the applications.

Example web service integrations include:

- Integrate sales applications with back-office applications.
- Create web-based portal applications that access sales applications through a web services interface.

Example import use cases include:

- Import products into the product catalog
- Import users
- Import sales accounts

## Configure Security Components

If the predefined security configuration doesn't meet your business needs, then you can make changes. For example, the predefined Sales Representative job role includes sales forecasting duties. If some business groups in your organization have the sales managers perform forecasting tasks instead of the sales representatives, then you can create a company-defined Sales Representative role without those duties. Alternatively, if a predefined job role is too narrowly defined, then you can create a job role with a greater range of duties than its predefined equivalent. See the *Securing CX Sales and Fusion Service* guide for more information.

## Synchronize Financials Accounts to Sales Applications

After users create accounts and contacts in Oracle Financials, use the scheduled process, Synchronize Financials Cloud Accounts and Contacts, to synchronize the data into the sales applications. See *How do I synchronize financials accounts and contacts with CX Cloud?* for more information.

## Integrate Sales Applications with Other Products

For additional functionality, you can integrate your sales applications with other products, including, Oracle E-Business Suite, JD Edwards EnterpriseOne, Siebel CRM, Oracle Eloqua, and Oracle Configure, Price, and Quotes (Oracle CPQ).

## Where to Find More Information

To find out where to get more information about the extensions and configurations discussed in this topic, see this list:

- Configure the help system: See *Common Components* chapter in this guide and the *Oracle Applications Cloud Configuring and Extending Applications* guide
- Create interactive guides to help your users learn about the applications: See *Manage Guided Learning for Onboarding and Training*
- Configure the Home page, the Navigator, and the springboard: See *Common Components* chapter in this guide and the *Oracle Applications Cloud Configuring and Extending Applications* guide
- Change the UI:
  - *Common Components* chapter in this guide
  - *Oracle Applications Cloud Configuring and Extending Applications* guide
  - The chapters on extending sales business objects in this guide
- Use Copy Maps: Start with *Set Up Your Mapping File When Copying Opportunities*
- Use Oracle Business Intelligence reports and analytics: Start with *Analytics on the Go* and the *Oracle CX Creating and Administering Analytics* guide
- Synchronize Financials Accounts to the Sales Applications: See *How do I synchronize financials accounts and contacts with CX Cloud?*
- Integrate applications using web services and use Import and Export Management: See *Overview of Import and Export*
- Integrate the Sales applications with other products: See the article on sales integrations (1962226.1) available on *My Oracle Support*.

## About Application Composer

Application Composer is a browser-based configuration tool that enables business analysts and administrators, not just application developers, to extend their applications. Make the type of data model changes which, in the past, could only be made by application developers.

For example, easily create a new object and related fields, then create new user interface pages where that object and its fields are exposed to users.

Application Composer is a design time at runtime tool, which means that you can navigate to Application Composer directly from any application, make your changes, and see most changes take immediate effect in real time, without having to sign out and sign back in. (For end users to see your changes, however, you must first publish your sandbox and then they must sign out and sign back in. Read more about sandboxes later in this topic.)

**Note:** To see your changes in real time, always use the Navigator to navigate to the runtime page that you changed. Then navigate back to Application Composer to continue making changes. In other words, when making application changes (and testing them), restrict your usage to a single tab. Don't work across multiple browser tabs, because Application Composer doesn't support this type of usage.

You can use Application Composer to configure Oracle's Sales and Fusion Service, Supply Chain Management, and Project Management applications.

Application Composer isn't supported for use with iPad devices.

## Application Changes for Nondevelopers

Application Composer hides the complexity of modifying applications by leveraging a set of standard design patterns and wizards. You focus on the application changes that your business requires (object model extensions and layout changes, for example), and Application Composer creates the underlying object artifacts for you.

Using Application Composer, you can make application changes such as the following:

- Modify objects by adding new fields, or create entirely new objects.
- Create foreign key-based relationships between two objects.
- Modify user interface pages by exposing your newly created fields for an object, or create an entirely new work area for your custom objects.  
Expose object relationships in the form of subtabs on pages.
- Write application logic, such as triggers, validation rules, and workflows, for an object, or for use across multiple objects.
- Implement functional and data-level security for custom objects.
- Enable objects for custom reporting.

## Working in a Sandbox

To make most application changes, you should work in a sandbox. In fact, many functions in Application Composer aren't available until you enter into an active sandbox. You use sandboxes to make application changes and test them without impacting other users in the environment. Wherever possible, make changes to the application in a sandbox rather than making direct changes in the mainline environment.

Sandboxes set apart untested configuration changes from the mainline environment. This lets you test your changes in a sandbox first, before publishing it. After publishing, your changes become available in the mainline metadata, or other sandboxes after they're refreshed, so that everyone can see your changes. Mainline metadata is the primary branch of metadata a sandbox is published to. Note that end users must sign out and sign back in to see the changes from a published sandbox.

**Tip:** As a best practice for using sandboxes in Application Composer, follow the below sequence to make your application changes:

1. Publish a sandbox with model-level changes, like creating an object and creating relationships for that object.
2. Publish a sandbox with the UI-level changes for the object, like adding layouts, subtabs, etc.

This order can minimize conflicts while publishing your sandboxes.

To learn more about sandboxes, see [Overview of Sandboxes](#).

## Accessing Application Composer

Access Application Composer at runtime by using the Navigator menu, and selecting **Application Composer** under the Configuration category.

The first view of Application Composer is the main Overview page, which is the entry point into all your task options.

## Getting Started

From the main Overview page:

- Use the object tree to select the object you want to modify. Or, click the New icon to create a new object.
- Use the links in main Overview page, also known as the local area, to select a task. Or, use the links in the Common Setup pane.

### *Related Topics*

- [Define Objects](#)
- [Define Fields](#)
- [Overview of Sandboxes](#)

## Use Page Composer to Extend Pages

### Overview of Configuring Sales Pages Using Page Composer

Configure the look and feel of user interface (UI) pages using Page Composer:

- Make changes on a single page for all users or only a subset. For example, you can enable a field that's hidden or make a field required.
- Create saved searches (lists) in the different work areas. These can be used as filters in actionable infolets.
- Specify which columns display in the summary tables in the work area landing pages.
- Create new infolets and create different default views of infolets for different sets of users.

This chapter covers:

- Points to consider before you configure pages
- How to configure standard desktop pages, landing pages, and dashboards
- How to configure application pages
- How to use Direct Selection mode to make user interface changes
- How to work with components for configure pages

**Note:** Page Composer supports two editing modes: Add Content and Select. Use the Add Content mode to navigate to different tabs and windows on a page and to add content on the Partner Relationship Management's Partner Portal UI Shell. You can make enable fields and make other configurations only in the Select mode.

*Related Topics*

- [Configure Sales Pages Using Page Composer](#)
- [Modify UI Components Using Page Composer](#)

## Differences Between Using Page Composer and Application Composer

You can use multiple tools to configure the UI. This topic highlights the differences between the types of configurations you can do using Application Composer and Page Composer.

### Key Differences

| Basis of Comparison                                              | Page Composer                                                                                                                                                                                                                                                                                                       | Application Composer                                                                                                                                                                                                                                                                            |
|------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Configuring the page you're viewing                              | <p>Configure a UI page you're viewing and see your changes reflected immediately on that page.</p> <p>You can use Page Composer to make changes to one page at a time. For example, if you make a field required on the Edit Infolets page, the field isn't automatically required on the Create Infolets page.</p> | <p>You make your configurations in Application Composer. You can then test your work by navigating to the appropriate page.</p> <p>Because you use Application Composer to configure application objects, if you make a field required, it affects all interfaces where that field appears.</p> |
| Supported interfaces                                             | Application UI                                                                                                                                                                                                                                                                                                      | <ul style="list-style-type: none"><li>• Application UI</li><li>• Mobile</li><li>• Microsoft Outlook</li></ul>                                                                                                                                                                                   |
| Creating your own fields and application objects                 | Not supported.                                                                                                                                                                                                                                                                                                      | You can add custom fields and entirely new objects.                                                                                                                                                                                                                                             |
| Creating saved searches                                          | Create and edit saved searches for users. The saved searches provide saved search criteria to speed up common searches. You can also use them as filters in actionable infolets.                                                                                                                                    | Not supported.                                                                                                                                                                                                                                                                                  |
| Tailoring your configurations for users with different job roles | Supports different levels of configurations for application pages.                                                                                                                                                                                                                                                  | Supports configurations by job role or for all users.                                                                                                                                                                                                                                           |
| Configuring external-facing partner pages                        | You must use Page Composer to configure all external-facing partner pages, such as the partner registration page and the partner portal landing page.                                                                                                                                                               | You must use Application Composer to configure only for partner pages internal to your organization, such as the partner Overview page.                                                                                                                                                         |



## What You Can't Do in Page Composer

Using Page Composer, you can't do these tasks:

- Change either the data or functional security for a page. While you can hide some components, you must change the security setup to control access.
- Filter or reorder lists of values.
- Add any code, validation logic, or scripting to the buttons or fields.
- Add call outs to other APIs to populate fields with values.
- Change the selections that appear in the **Navigator** menu.
- Configure the Search region inside Search and Select dialog box.

## Configure Sales Pages Using Page Composer

Use Oracle Page Composer to configure Sales pages in a sandbox while you're working in the application. You can make your UI configurations available to all users or only to a subset, such as only to partners or only to users with a specific job role.

Oracle Page Composer is a page editor, developed as part of Oracle WebCenter, for revising the layout and content of application pages. Its full capabilities are described in the Oracle Fusion Middleware User's Guide for Oracle WebCenter and in the Oracle Fusion Applications Extensibility Guide.

You can use Page Composer, also known as Oracle Composer, for performing the following types of configurations in your sales application pages:

- Simple UI editing functions, such as showing and hiding fields, changing field labels, and making fields read-only or required
- Changing page layout and adding Oracle BI Publisher reports and other content to dashboard pages
- Creating new infolets
- Creating saved searches (also called saved lists) for others in the organization
- Configuring the display of search results in tables

**Note:** If you're planning to configure the UI for a specific job role, then you must have that job role assigned to you so that you can test the configuration in the sandbox.

## How to Open Page Composer

To open Page composer, create and enter a sandbox with Page Composer as one of the tools and select Page Composer from the Tools menu. If you're planning to use Page Composer to make changes for specific job roles, then you must create a separate sandbox just for Page Composer. The other tools don't support making changes by job role.

1. Activate a sandbox.

The active sandbox name appears at the top of the page.

2. Click the user image or name and select **Edit Pages** from the **Settings and Actions** menu.

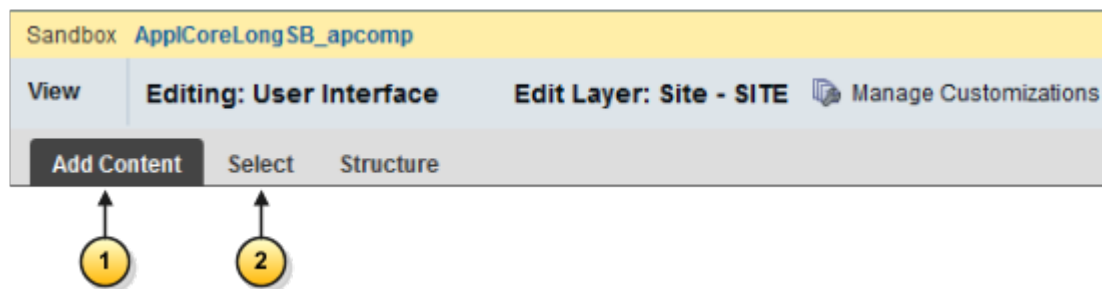
## Page Composer Modes

When configuring sales pages, you can use Page Composer in one of two modes: the Add Content mode and the Select mode. The following figure shows a partial screen capture of the Page Composer toolbar with the two modes highlighted by callouts.

- Use the Add Content mode (highlighted by callout 1 in the following figure) to move, add, and edit regions on dashboards and external-facing partner pages. You also use this mode to create saved searches, specify search result content, and to navigate in the UI when you're in Page Composer.

You're in the Add Content mode when you first open Page Composer. You can also select this mode by clicking **Add Content** on the top left corner of a page.

- Use the Select mode (callout 2), which you can activate by clicking **Select**, to configure the properties of different UI elements such as fields and table columns.



## Add Content Mode

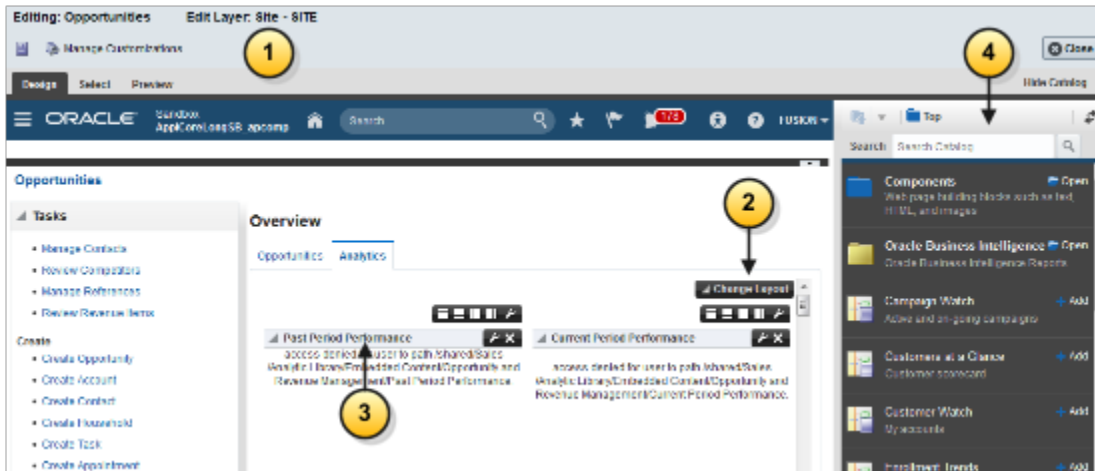
Use the Add Content mode to do the following:

- Configure the content on dashboard pages, including the Welcome page in the desktop UI.  
Dashboards pages are the pages that users land on when they navigate to work areas using the Navigator. Dashboard pages display analytics, notifications and other information.
- Configure all of the external-facing landing and transactional partner management pages.
- Configure the table display of search results.
- Create saved searches (saved lists).
- Navigate to other pages while working in Page Composer.

When you open Page Composer, the application opens in the Add Content mode automatically. On pages that support configuration in this mode, such as the sales dashboard in the following image, different regions are highlighted with borders and display configuration controls.

The following screenshot shows a partial screen capture of an application page with the different Add Content features highlighted by callouts.

- A bar appears at the top of the page indicating that you're in editing the page in Page Composer (callout 1).
- You can change the column layout of the page by clicking **Change Layout** (callout 2).
- You can move a region, by grabbing its toolbar (callout 3) and dragging it to a different position.
- You can add a new tab (callout 4).



You can also make changes in each region:

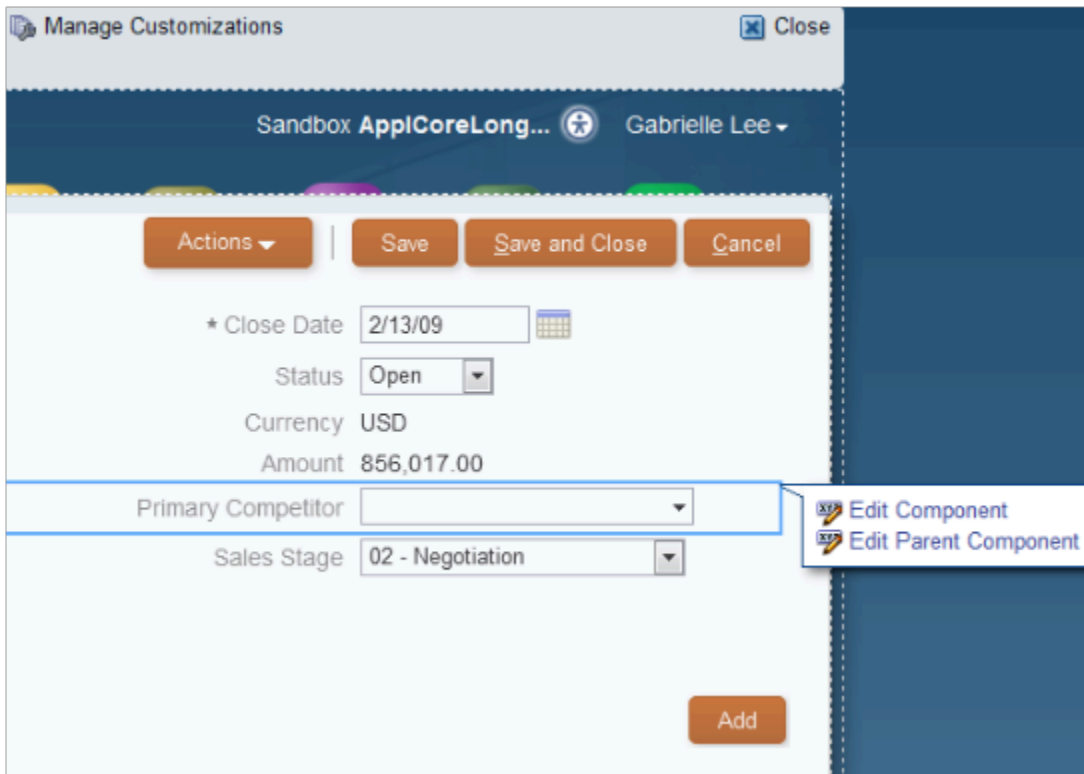
- You can remove a region by clicking **Close**, the icon at the top right-hand corner of the region.
- You can add content by clicking **Add Content**.
- You can add a new region by clicking one of the icons to the right of the **Add Content** button. These icons specify where in the page the new region is created.

## Select Mode

In the Select mode, a border appears around individual fields and other UI elements as you move your cursor over them.

Clicking within a border for a UI element that supports configuration displays a menu with one or both of the following options: **Edit Component** and **Edit Parent Component**.

The following screenshot shows the Edit Component menu in the Page Composer Select mode.



Not all UI elements support configuration, so these editing options aren't always enabled.

You use the Component Properties window to make your configurations. Not all the configurations are available on all the UI elements, so the content of this window varies. The following screenshot highlights the different components with callouts.

- To make a field read-only, you select the **Read Only** option (callout 1).
- To make a field required, you select the **Required** option (callout 2).

**Note:** Before making a field required, the field must display a value. If it doesn't, then cancel out of this window and enter the value first.

- To hide the field, you deselect the **Show Component** option (callout 3).

**Note:** Some UI components are protected from updates to preserve the product business logic. For example, if a field is read-only because of a security privilege defined in the application, you can't make it editable in Page Composer.

## How to Edit the Partner Portal UI Shell Using the Page Composer Source View

Channel partner portal administrators can use Page Composer's Source View to configure the header and footer areas of the pages partners use to register themselves and sign in after they're registered. This is the only sales page which supports this mode. You can use this mode to add a company logo, copyright information or links, for example.

To configure the partner portal UI shell, you must activate a sandbox and select the **Update Partner Portal UI Shell** task in the Channel dashboard.

To learn more about working in the Source view, see the Oracle Fusion Middleware User's Guide for Oracle WebCenter.

## How to Make Configurations Available to Different User Groups

You can make your configurations available to different subsets of users.

When you launch Page Composer, you must select one of the following configuration layers:

- **Site:** Your configurations are visible to all users.
- **External or Internal:** Depending on your selection, your configurations are visible to either internal users (your employees) or to external users (your partners or anonymous users).

- **Job Role:** Your configurations are visible to users with the job role you select. The list of available job roles includes all the job roles assigned to you directly and any job roles that are inherited by those job roles.

**Note:** If you created your own job roles, then you must run the Retrieve Latest LDAP Changes process from the Scheduled Processes work area before the job roles are available for selection.

By default, configurations you made at a higher level are propagated to lower-level layers, unless you deselect these layers in the Include column.

**Note:** The Welcome page in the desktop UI doesn't support different configuration layers. You must configure this page at the site level.

#### Related Topics

- [Differences Between Using Page Composer and Application Composer](#)

## FAQs for Page Composer

### Frequently Asked Questions (FAQs) for Page Composer

This section contains some frequently asked questions (FAQs) when using Page Composer. Scroll or search to find answers to common questions.

#### What do I do if Page Composer closes while I am navigating in the UI?

If you're using Page Composer in Design mode and trying to navigate between different objects in the application, the Page Composer sometimes closes. That's because it's designed to configure one object at a time.

When you no longer see the Page Composer bar at the top of your screen, simply restart Page Composer. Your previous work is preserved in the active sandbox, so you don't have any data loss.

#### How can I reset all personalization changes made by a specific end user?

Your end users can personalize a page explicitly (like creating a saved search) or implicitly (like changing table column width). You can revert all such changes made by a specific user using the Personalization page in Application Composer.

In the Common Setup region, click **Personalization**. Search for a user and then click **Reset Personalization**. All changes made by that user are removed and all pages are restored to the default content and layout as originally delivered. Changes implemented by an administrator using Application Composer and Page Composer are retained, if they exist.

End users can also revert their changes themselves, but only on a page-by-page basis.

#### Related Topics

- [How can I reset a page or task flow to a previously saved version?](#)

#### Can I edit Expression Language (EL) expressions using Page Composer?

No, Page Composer doesn't allow editing EL expressions to protect the business logic implemented through EL expressions.

## Can I use Page Composer to configure all elements on a page?

No, you can't use Page Composer to configure all UI elements on a page.

Some UI elements are protected from updates to preserve the product business logic. For example, if a field is read-only because of a security privilege defined in the application, you can't edit the field.

You can't select some page elements in the Select mode of Page Composer. For others, the **Edit Component** option is disabled or only a subset of the properties are available in the Component Properties dialog box.

**CAUTION:** Don't edit the **Taskflow Id** parameter in Page Composer Task List properties. This may damage page metadata.

In general, you can configure at least some of the properties of the following page components:

- af:activeOutputText
- af:inputComboboxListOfValues
- af:inputDate
- af:inputFile
- af:inputListOfValues
- af:inputNumberSlider
- af:inputNumberSpinbox
- af:inputRangeSlider
- af:goLink
- af:query
- af:inputText
- af:outputFormatted
- af:outputText
- af:panelLabelAndMessage
- af:panelFormLayout
- af:panelHeader
- af:richTextEditor
- af:selectBooleanCheckbox
- af:selectBooleanRadio
- af:selectManyCheckbox
- af:selectManyChoice
- af:selectManyListbox
- af:selectManyShuttle
- af:selectOneChoice
- af:selectOneListbox
- af:selectOneRadio

- af:selectOrderShuttle
- af:showDetailHeader
- af:table
- af:column
- fnd:applicationsTable
- af:commandMenuItem
- af:menu
- af:panelGroupLayout
- af:panelTabbed
- af:group
- af:commandButton



# 42 Extend Accounts, Contacts, and Households

## Overview of Account and Contact Extensibility

Extend objects and pages related to accounts and contacts.

In this chapter, you will learn about:

- Each standard object related to accounts and contacts and how to extend those objects using Application Composer.
- How to configure Customer Center pages using Page Composer.

### *Related Topics*

- [Extend Pages for Accounts](#)
- [Extend Pages for Contacts](#)
- [Extend Application Pages for Relationships](#)
- [Extend Pages for Assets](#)
- [Extend Pages for Households](#)

## Extend Pages for Accounts

Using Application Composer, you can change many items for accounts pages.

Use Application Composer to modify the following pages:

- Accounts landing page
- Create Account page
- Edit Account page

For example, you can:

- Hide or show standard fields.
- Set fields as required.
- Set field default values.
- Reorder columns.
- Change column labels.
- Add custom fields (all types).

**Note:** To extend the pages for accounts, use the Account object in Application Composer.

## Accounts Landing Page

You can modify the Accounts landing page, also referred to as the Accounts list page. For example, you can hide standard account fields or show custom account fields. To modify the Accounts landing page:

1. Navigate to the Account object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, click **Edit Summary Table for Account**.

## Create Account Page

You can modify the Create Account page. For example, you can hide standard account fields, make a field required, add a default value, and show custom account fields. To modify the Create Account page:

1. Navigate to the Account object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

To enhance runtime usability for your end users, optionally group custom fields into field groups.

**Note:** Custom fields that you add to the Account object and then select for display in a page layout appear on the Create Account page, before the address set of fields.

## Edit Account Page

The Edit Account page consists of multiple subtabs that display along the left side of the page. You can modify most of these subtabs, as well as hide or show subtabs. For example, you can also add custom subtabs to display records from child or related objects

To add custom fields to certain subtabs available from the Edit Account page, you must first navigate to those subtab target objects in Application Composer to create the fields. After creating the fields on the target object, you can then navigate to the required details page layout for the Account object to add those fields to the relevant subtabs.

To modify the Edit Account page:

1. Navigate to the Account object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

4. When making changes to the Edit Account page, select the subtab you want to change first. The following subtabs are available from the Edit Account page. Use the following subtabs to configure which standard and custom fields display at runtime.

The changes you make to these subtabs are unique to the Edit Account page. For example, the changes you make to the Opportunities subtab on the Edit Account page aren't reflected on the Opportunities subtab on the Edit Contact page.

- Overview
- Profile

**Note:** When adding a custom field group to the Profile tab, the custom field group always displays above the Address region at runtime. This is true even if the custom field group is positioned differently when configuring the layout in Application Composer.

- Team

Use the Sales Account Resource and Sales Account Territory objects to create custom fields as needed.

- Contacts

Use the Contact object to create custom fields as needed.

**Note:** To expose the Contact custom fields on the Contacts subtab, create a join for the field under the Custom Contact Profile object.

- Assets

Use the Asset object to create custom fields as needed.

- Opportunities

Use the Opportunity object to create custom fields as needed.

- Leads

Use the Lead object to create custom fields as needed.

- Relationships

Use the Relationship object to create custom fields as needed.

- Notes

Use the Note object in Application Composer to create custom fields as needed, and to extend this subtab.

On the Application Pages tab for the Note object, edit the default creation page layout or duplicate it to create a new layout.

The Notes list page isn't extensible.

- Activities

Use the Activity object in Application Composer to extend this subtab.

On the Application Pages tab for the Activity object, click **Edit Embedded Summary Table** (at the bottom of the page).

- Conversations

Not extensible from this page.

## Configure Default Search on Standard Subtabs for Accounts

When a user opens the subtab at runtime, the records displayed are automatically filtered using the search criteria you added. Users can change the default search value, but they can't change the default search field. They can, however, further refine their search by adding additional search fields and values at runtime.

Adding a default search filter to a subtab is optional. If you skip this step, then no search fields are automatically added to the subtab, but users can still see the search region and perform their desired search.

Use this procedure to add a default search filter field, operator, and value for the Leads subtab search on the Edit Account page.

**Note:** You can select only one default search filter for each subtab. When adding a default search filter to standard subtabs, the search filter applies to all existing details page layouts with this subtab. Let's say you add a search filter to the Lead subtab on an Account details page layout. This means that the same search filter is added to the Lead subtab on an Opportunity details page layout.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**.
4. In the navigation tree, expand **Standard Objects**, expand **Account**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.

The Details Layout page appears.

8. In the **Subtabs Region**, highlight **Leads** and click the pencil icon.
9. From the **Configure Detail Form** page region, go to the **Configure Summary Table: Search Region**.
10. Select the default search filter you want to apply to the Leads subtab.

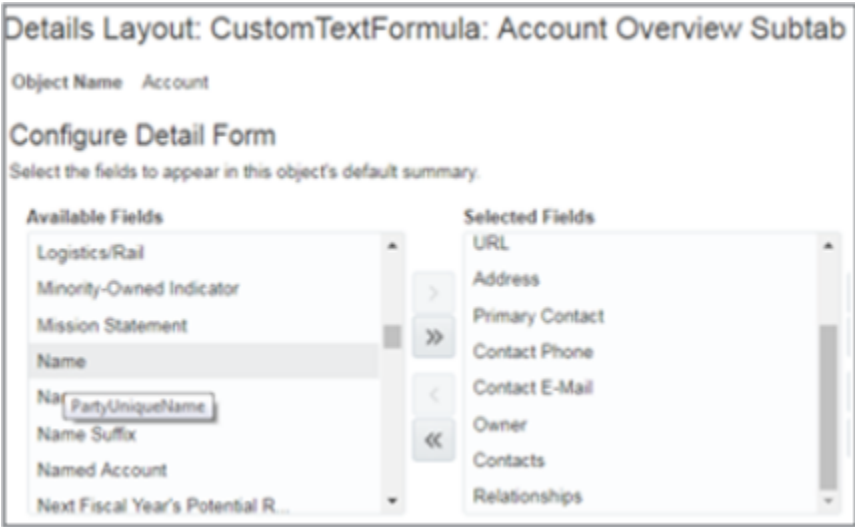
You can select from a list of both standard and custom Lead fields. Note that you can't pick dynamic choice list fields, set ID-based fixed choice list fields, and any fields that aren't searchable. Also, if this subtab was added based on a many-to-many (M:M) relationship, then you can select from only those intersection object fields that are already displayed on the subtab.

For example, you want to create a search filter to search for all qualified leads for an account. Select **Status** from the drop-down list and select **Equals** as the operator and then select the Qualified check box.

11. Click **Done** and ensure that the layout status for your Leads subtab layout is set to Active.
12. Test the changes: Navigate to **Sales > Accounts** as a user with access to the account pages, for example, as a salesperson. Edit an account and confirm that the data that displays on the Leads subtab includes only qualified leads.
13. Publish the sandbox.

# Select the Correct Name Field When You Configure Account Pages

You can see two Name fields in the accounts object, when you add fields on a new layout, in the Application Composer. Hover over the fields to see the description for each instance; one field shows OrganizationName and the other PartyUniqueName.



When you add a Name field to a dynamic choice list for accounts, you can't see the description when you hover on the name field. The difference between the two instances is the value that's added to the list. The first instance of the Name field adds the organization name while the second instance adds the party unique name to the display list. Here's a description of the fields.

| Field Name        | Description                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Organization Name | Displays the name of the organization. This is the name you entered while creating an account.                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Party Unique Name | <p>Displays the unique name of a party. This name is created by putting together the party name and suffix. If the suffix is null, then it's automatically generated for sales account, sales prospect, external legal entity and contact.</p> <p>When a suffix is null or doesn't have to be generated, the PartyUniqueName is same as the party name. You can configure the suffix using the task Common Party Suffix Format that's within Manage Address Formats.</p> <p>By default, the suffix is configured using the city and country of the primary address.</p> |
| UniqueNameAlias   | Displays the name of the organization on the Edit Account page.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |

## Modify the Overview Subtab

You can modify the Overview subtab for accounts, contacts, households, and partners. You can hide or show fields that appear on the left side of the subtab. Additionally, you can rearrange the position and grouping of the summary boxes, formerly referred to as infolets,

### Extensibility on the Overview Subtab

The Overview subtab for accounts, contacts, households, and partners is the top subtab that appears for an account, contact, household, or partner record. Data that appears in the Overview subtab is read only, but your users can drill down to more details from here.

**Edit Account: Advanced Consulting: Overview**

**Sales**

- Open Opportunities (Amount 0): 0
- Open Leads (7 Hot): 23
- Open Quotes and Orders (Amount 0): 0
- Active Contracts: 0

**Service Requests**

- Open Service Requests (0 Critical): 0

**Activities**

- Open Activities: 9
- 4/4/16 To do: Send sales... Peter Branch Last Completed Task

On the left side of the Overview subtab, key fields for the account, contact, household, or partner record are displayed. Use Application Composer to show or hide these read-only fields.

On the right side of the subtab, key data points about related object records are displayed as number totals in summary boxes. Use Application Composer to rearrange the position and grouping of the summary boxes. You can also create new summary boxes to highlight key data points for custom objects.

### Hiding and Showing Fields

The Overview subtab includes a region on the left with a standard set of fields that display. You can further modify those fields by hiding existing fields, and showing new fields. You can also reorder these fields.

**Note:** These fields are read only. Your end users can edit these fields at run time on the Profile subtab.

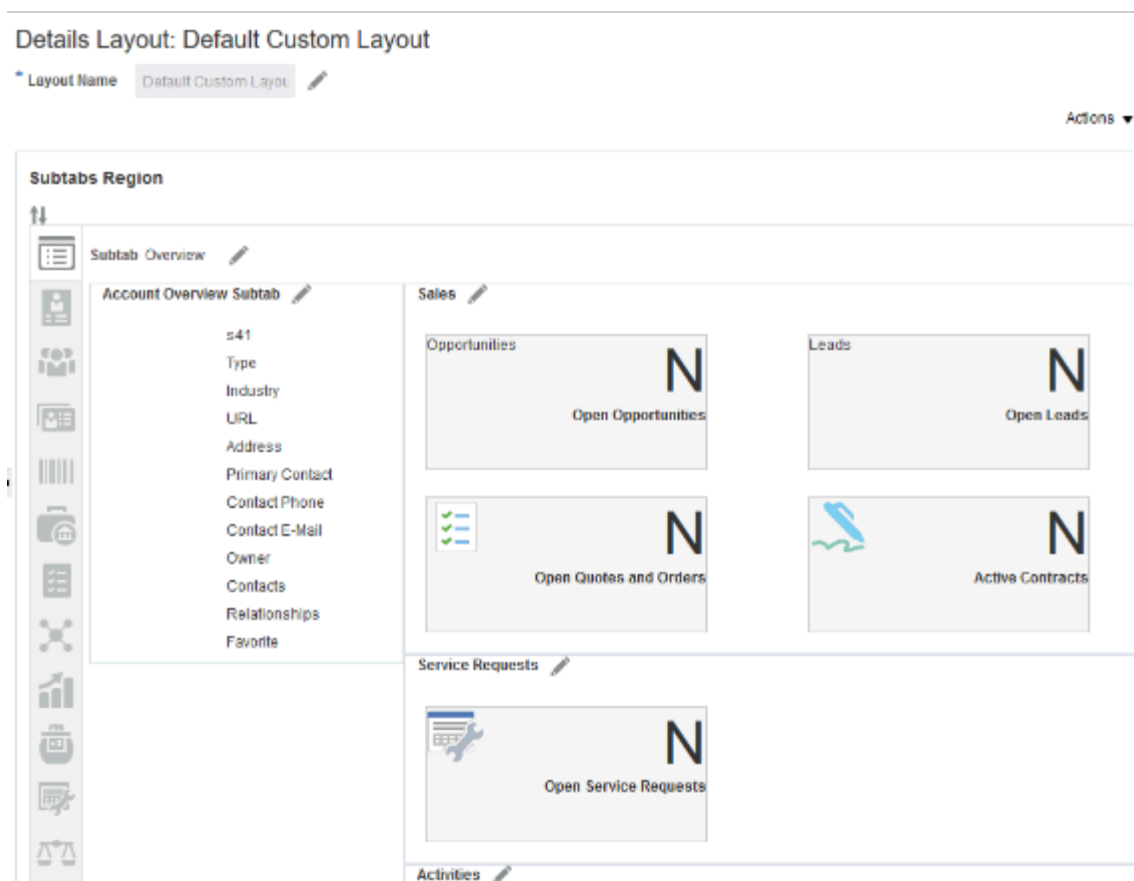
To hide and show fields, and reorder them, on the Overview subtab:

1. In Application Composer, navigate to the Application Pages tab for either the account, contact, household, or partner object.
2. On the Application Pages tab, scroll down to view the Details Page Layouts table.

Duplicate the standard layout to create a new layout to edit, or edit another existing layout.

3. Within the selected details page layout, navigate to the Overview subtab.

Click the Edit icon next to the Overview Form heading to configure which fields display at run time, and in which order.

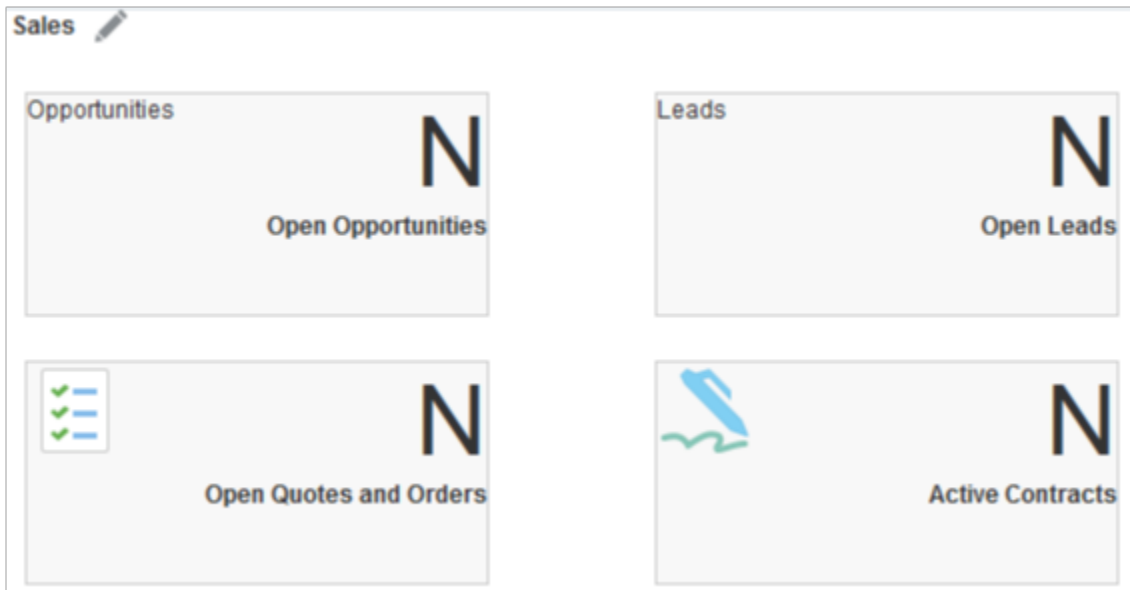


## Summary Box

A summary box, formerly referred to as an infolet, is a container on a page which summarizes some key information about the record's related object records, so that your end users don't have to navigate to other tabs. For example, a summary box might display the number of total open opportunities that you're responsible for. At run time, users can click that number to drill down to more details. Typically, clicking a number in a summary box takes the user to another subtab for the object record.

**Note:** The summary boxes that appear on the Overview subtab for accounts, contacts, households, and partners are different from the infolets that you can embed in Business Intelligence (BI) dashboards, and thus aren't interchangeable.

Below is an example of four summary boxes that display on the Account Overview subtab. These four summary boxes are arranged within a summary box group called Sales.



The account, contact, household, and partner objects have a set number of summary boxes that you can rearrange and group. Summary boxes are grouped by default, but you can create new groups and rearrange the summary boxes to fit the needs of your users. In addition, you can create new summary boxes for custom objects only.

To view the available summary boxes for an object:

1. In Application Composer, navigate to the Application Pages tab for either the account, contact, household, or partner object.



2. On the Application Pages tab, scroll down to view the Summary Boxes table.

| Summary Boxes                                                                                                                                                                        |          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| Actions ▼ View ▼   |          |
| Name                                                                                                                                                                                 | Type     |
| Active Contracts                                                                                                                                                                     | Standard |
| Assets                                                                                                                                                                               | Standard |
| Last Appointment                                                                                                                                                                     | Standard |
| Last Completed Task                                                                                                                                                                  | Standard |
| Open Activities                                                                                                                                                                      | Standard |
| Open Leads                                                                                                                                                                           | Standard |
| Open Opportunities                                                                                                                                                                   | Standard |
| Open Quotes and Orders                                                                                                                                                               | Standard |
| Open Service Requests                                                                                                                                                                | Standard |
| Second to Last Appointment                                                                                                                                                           | Standard |

This table lists the available summary boxes that are registered for the object. Review the next section for tips on working with summary boxes and summary box groups.

## Working with Summary Boxes

The Overview subtab includes a region on the right where summary boxes display. Summary boxes are grouped and arranged by default, but you can rearrange the position and grouping of these summary boxes. You can remove a summary box from an existing summary box group, and add it to another existing summary box group. Or, you can create a new summary box group, or delete existing summary box groups.

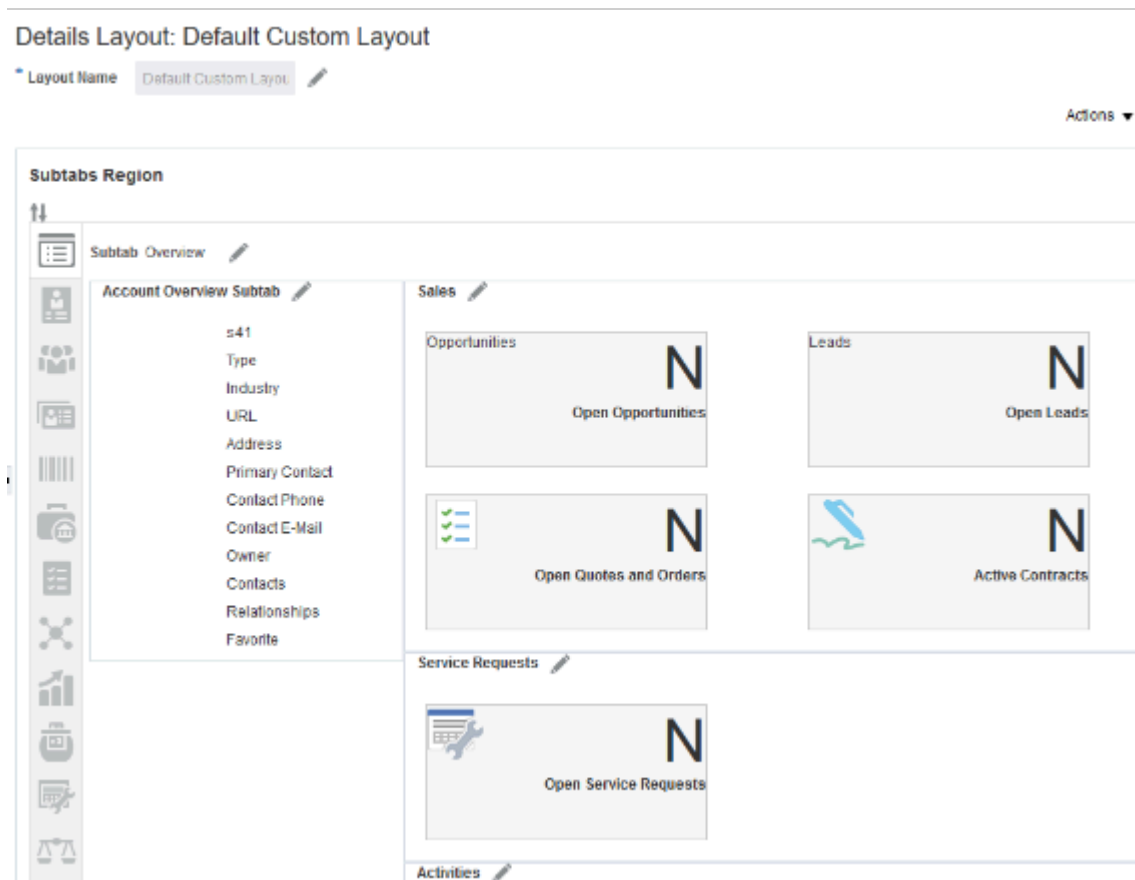
To rearrange summary boxes:

1. In Application Composer, navigate to the Application Pages tab for either the account, contact, household, or partner object.
2. On the Application Pages tab, scroll down to view the Details Page Layouts table.

Edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.

3. Within the selected details page layout, navigate to the Overview subtab to configure summary box groups.

Click the Edit icon next to the summary box group that you want to configure.



4. Use the Available Summary Boxes and Displayed Summary Boxes lists to control which summary boxes are displayed within this summary box group at run time. Within the Displayed Summary Boxes list, use the up or down arrows to control the order of the summary boxes within the group.

If a summary box is listed under Available Summary Boxes but you can't select it, then this means that the summary box is already displayed inside another summary box group. If you want to include that summary box

in the current group, then you must remove it from the other summary box group first, before you can add it to the current group.

5. You can delete summary box groups from this page by clicking **Delete**. Deleting a summary box group doesn't delete any included summary boxes.

To create a new summary box group:

1. In Application Composer, navigate to the Application Pages tab for either the account, contact, household, or partner object.
2. On the Application Pages tab, scroll down to view the Details Page Layouts table.

Edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.

3. Within the selected details page layout, navigate to the Overview subtab to configure summary box groups.
4. Navigate to the bottom of the page and click **Create Summary Box Group**.

## Creating Summary Boxes

You might want to highlight custom object data on an Overview subtab. Use Application Composer to create new summary boxes that summarize key data points about custom objects.

You can't create summary boxes for standard objects.

To create a new summary box for a custom object:

1. In Application Composer, navigate to the Application Pages tab for either the account, contact, household, or partner object.

2. On the Application Pages tab, scroll down to view the Summary Boxes table.

| Summary Boxes                                                                                                                                                                        |          |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|
| Actions ▾ View ▾   |          |
| Name                                                                                                                                                                                 | Type     |
| Active Contracts                                                                                                                                                                     | Standard |
| Assets                                                                                                                                                                               | Standard |
| Last Appointment                                                                                                                                                                     | Standard |
| Last Completed Task                                                                                                                                                                  | Standard |
| Open Activities                                                                                                                                                                      | Standard |
| Open Leads                                                                                                                                                                           | Standard |
| Open Opportunities                                                                                                                                                                   | Standard |
| Open Quotes and Orders                                                                                                                                                               | Standard |
| Open Service Requests                                                                                                                                                                | Standard |
| Second to Last Appointment                                                                                                                                                           | Standard |

3. Click **New**.
4. Enter the name of the summary box. The name that you enter displays to your users as the heading of the summary box.
5. Select the target object for the summary box. Select from the custom objects that are related to the current object: account, contact, household, or partner.
6. Select the mathematical operation that you want the summary box to perform on the related object's records. For example, do you want the summary box to display a count of all records?
7. Optionally add filters to the summary box to constrain the records that are included in the results. For example, maybe you want to include only records created by a specific person.
8. Click **Save and Close**.

After creating a summary box, you must add it to all details page layouts where you want the summary box to display. Remember that you can add your new summary box to only one summary box group. Use the instructions above to add your custom summary box to a summary box group.

#### Related Topics

- [Extend Pages for Accounts](#)
- [Extend Pages for Contacts](#)
- [Extend Application Pages for Partners](#)
- [Extend Pages for Households](#)

## Extend Pages for Contacts

Using Application Composer, you can change many items that appear on the pages for contacts.

Use Application Composer to modify the following pages:

- Contacts landing page:

- Contacts cards view
- Contacts listing
- Create Contact page
- Edit Contact page

For example, you can:

- Hide or show standard fields.
- Set fields as required.
- Set field default values.
- Reorder columns.
- Change column labels.
- Add custom fields (all types).

**Note:** Note the fixed choice list for Contact Job Title isn't available in contact advanced search; you can only enable it as a text field.

## Contacts Landing Page

The Contacts landing page consists of two different views, which your users can toggle between:

- The Contacts cards view
- The Contacts listing

You can modify both pages.

The Contact cards view displays a list of all your users' contacts, but represented visually as cards. You can modify the fields that appear in each card. For example, you can hide standard contact fields or show custom contact fields. To modify the Contact cards view:

1. Navigate to the Contact object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, click **Edit Landing Page**.
4. In the Configure Card View region, select the fields that you want to display or hide in your contact cards.
5. Optionally, select the **Enable alphabetic filtering** check box to display the alphabetic bar which runs across the top of the contact cards page.

The Contacts listing displays all your users' contacts, but represented in a table list view. You can modify the columns that appear in the table. For example, you can hide standard contact fields or show custom contact fields. To modify the Contacts listing:

1. Navigate to the **Contact** object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, click **Edit Landing Page**.
4. In the Configure Summary Table region, select the fields that you want to display or hide in the Contacts list page.

## Create Contact Page

You can modify the Create Contact page. For example, you can hide standard contact fields, make a field required, add a default value, and show custom contact fields. To modify the Create Contact page:

1. Navigate to the **Contact** object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

To enhance runtime usability for your end users, optionally group custom fields into field groups.

**Note:** Custom fields that you add to the Contact object and then select for display in a page layout appear on the Create Contact page, before the address set of fields.

## Edit Contact Page

The Edit Contact page consists of multiple subtabs that display along the left side of the page. You can modify most of these subtabs. For example, you can also add custom subtabs to display records from child or related objects.

To add custom fields to certain subtabs available from the Edit Contact page, you must first navigate to those subtab target objects in Application Composer to create the fields. After creating the fields on the target object, you can then navigate to the required details page layout for the Contact object to add those fields to the relevant subtabs.

To modify the Edit Contact page:

1. Navigate to the **Contact** object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.
4. When making changes to the Edit Contact page, select the subtab you want to change first. The following subtabs are available from the Edit Contact page. Use the following subtabs to configure which standard and custom fields display at runtime.

The changes you make to these subtabs are unique to the Edit Contact page. For example, the changes you make to the Opportunities subtab on the Edit Contact page aren't reflected on the Opportunities subtab on the Edit Account page.

- Overview
- Profile
- Team

Use the Sales Account Resource and Sales Account Territory objects to create custom fields as needed.

- Assets

Use the Asset object to create custom fields as needed.

- Opportunities

Use the Opportunity object to create custom fields as needed.

- Leads

Use the Lead object to create custom fields as needed.

- Relationships

Use the Relationship object to create custom fields as needed.

- Notes

Use the Note object in Application Composer to create custom fields as needed, and to extend this subtab.

On the Application Pages tab for the Note object, edit the default creation page layout or duplicate it to create a new layout.

The Notes list page isn't extensible.

- Activities

Use the Activity object in Application Composer to extend this subtab.

On the Pages tab for the Activity object, click **Edit Embedded Summary Table** (at the bottom of the page).

- Conversations

Not extensible from this page.

## Configure Default Search on Standard Subtabs for Contacts

When a user opens the subtab at runtime, the records displayed are automatically filtered using the search criteria you added. Users can change the default search value, but they can't change the default search field. They can, however, further refine their search by adding additional search fields and values at runtime.

Adding a default search filter to a subtab is optional. If you skip this step, then no search fields are automatically added to the subtab, but users can still see the search region and perform their desired search.

Use this procedure to add a default search filter field, operator, and value for the Leads subtab search on the Edit Contact page.

**Note:** You can select only one default search filter for each subtab. When adding a default search filter to standard subtabs, the search filter applies to all existing details page layouts with this subtab. Let's say you add a search filter to the Lead subtab on an Contact details page layout. This means that the same search filter is added to the Lead subtab on an Account details page layout.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**.
4. In the navigation tree, expand **Standard Objects**, expand **Contact**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.

The Details Layout page appears.

8. In the **Subtabs Region**, highlight **Leads** and click the pencil icon.
9. From the **Configure Detail Form** page region, go to the **Configure Summary Table: Search Region**.
10. Select the default search filter you want to apply to the Leads subtab.

You can select from a list of both standard and custom Lead fields. Note that you can't pick dynamic choice list fields, set ID-based fixed choice list fields, and any fields that aren't searchable. Also, if this subtab was added based on a many-to-many (M:M) relationship, then you can select from only those intersection object fields that are already displayed on the subtab.

For example, you want to create a search filter to search for all qualified leads for a contact. Select **Status** from the drop-down list and select **Equals** as the operator and then select the Qualified check box.

11. Click **Done** and ensure that the layout status for your Leads subtab layout is set to Active.
12. Test the changes: Navigate to **Sales > Opportunities** as a user with access to the contact pages, for example, as a salesperson. Edit a contact and confirm that the data that displays on the Leads subtab includes only qualified leads.
13. Publish the sandbox.

## Extend Application Pages for Relationships

Using Application Composer, you can change many items that appear on the application set of pages for relationships.

Use Application Composer to modify this page:

- Add Relationship page

This page is available from the Relationships subtab when you drill down from the application details pages for these objects:

- Accounts
- Contacts
- Households

### Add Relationship Page

You can modify the Add Relationship page which displays when you create a relationship from the Relationships subtab on any Edit Account, Edit Contact, or Edit Household page. For example, you can hide standard relationship fields, make a field required, add a default value, and show user-defined relationship fields. You can also reorder fields and change field labels. To modify the Add Relationship page:

1. Navigate to the Relationship object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

To enhance run time usability for your end users, optionally group user-defined fields into field groups.



## Enable Salespeople to Add Household Relations to an Account

Let your salespeople add household or a group relation to an account. Here's how you enable:

1. In the Setup and Maintenance work area, use the **Manage Standard Lookups** task:
  - Offering: Sales
  - Functional Area: Sales Foundation
  - Task: Manage Standard Lookups
2. On the Manage Standard Lookups page, search for **ZCA\_RECORD\_TYPE**.
3. In the Lookup Codes section, select the **Enabled** checkbox for **Group**.
4. **Save and Close** the page.

Household will appear as an option in the Add Relation button in the Relationships subtab of an Account edit page.



# 43 Extend Assets

## Extend Pages for Assets

Using Application Composer, you can change many items that appear on the pages for assets.

Use Application Composer to modify these pages:

- Asset list page (includes a summary table of assets)
- Create Asset page
- Edit Asset page

These pages are available as subtabs when you drill down from the details pages for these objects:

- Accounts
- Contacts
- Households

**Note:** Use the Asset object in Application Composer to create custom asset fields. Note that you can't add custom buttons and actions to any page for assets.

## Assets List Page

You can modify the Assets list page which displays when you first navigate to the Assets subtab on any Edit Account, Edit Contact, or Edit Household page. For example, you can hide standard asset fields or show custom asset fields.

To modify the Assets list page which appears on the Assets subtab on the Edit Account, Edit Contact, or Edit Household pages:

1. Navigate to the Account, Contact, or Household object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.
4. Select the Assets subtab to configure which standard and custom fields display at run time.

Use the Asset object to add custom fields as needed, before you can select them for display on the subtab.

**Tip:** The changes you make to the Assets subtab are unique across the Edit Account, Edit Contact, and Edit Household pages. For example, the changes you make to the Assets subtab on the Edit Account page aren't reflected on the Assets subtab on the Edit Contact page.

## Create Asset Page

You can modify the Create Asset page which displays when you create an asset from the Assets subtab on any Edit Account, Edit Contact, or Edit Household page. For example, you can hide standard asset fields, make a field required,

add a default value, and show custom asset fields. You can also reorder fields and change field labels. To modify the Create Asset page:

1. Navigate to the Asset object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

To enhance runtime usability for your end users, optionally group custom fields into field groups.

## Edit Asset Page

You can modify the Edit Asset page which displays when you edit an asset from the Assets subtab on any Edit Account, Edit Contact, or Edit Household page. For example, you can hide standard asset fields, make a field required, add a default value, and show custom asset fields. You can also reorder fields and change field labels. To modify the Edit Asset page:

1. Navigate to the Asset object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

To enhance runtime usability for your end users, optionally group custom fields into field groups.

### Related Topics

- [Extend Application Pages for Assets Using Application Composer](#)

# Extend Application Pages for Assets Using Application Composer

This example demonstrates how you can modify application pages for assets using Application Composer.

In this example, you will see how to add the field **Asset Number** to the Create Asset page using Application Composer. You will also test whether the field appears in the application page for creating an asset.

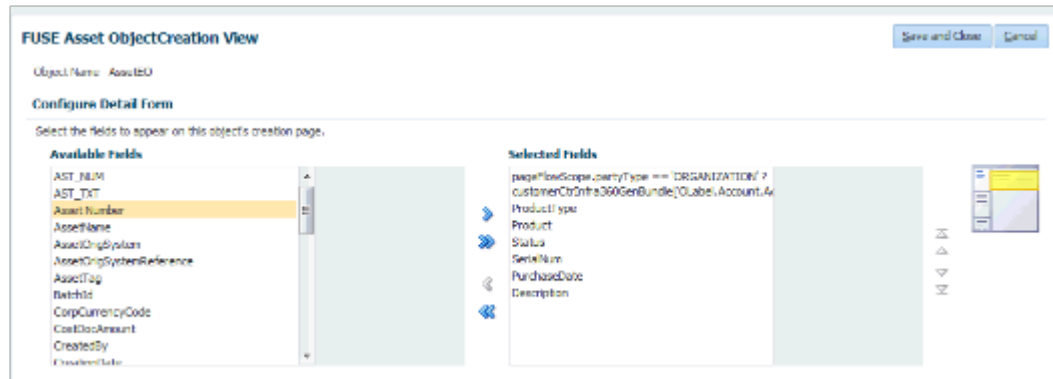
**Note:** Ensure that you have the privileges to create and view an asset.

## Extending Application Pages for Assets Using Application Composer

1. Navigate to Application Composer.
2. In the object tree, select the standard object, Asset, which includes a set of application pages.
3. Select the Pages node.
4. Select the Application Pages tab.
5. Use the links on the tab to navigate to the object's configuration pages, where you can modify the application pages that are available for the selected object. You can show or hide fields, rearrange fields, and add your own fields.

6. For example, to add the field **Asset Number** to the **Create Asset** page, highlight a page layout in the Creation Page Layouts table and click the **Edit** icon. You can also select **Actions > Edit Layout..**
7. On the **Edit Application Creation Page**, click the Edit icon (pencil icon) to modify the Create Asset page.
8. In the Available Fields list, double-click **Asset Number** to move it to the **Selected Fields** column. You can also click the Right arrow button to move an item.

This figure shows the Available Fields and Selected Fields lists, which you use to hide and show fields on the run time Create Asset page.



9. Click Save and Close.
10. Click Done.

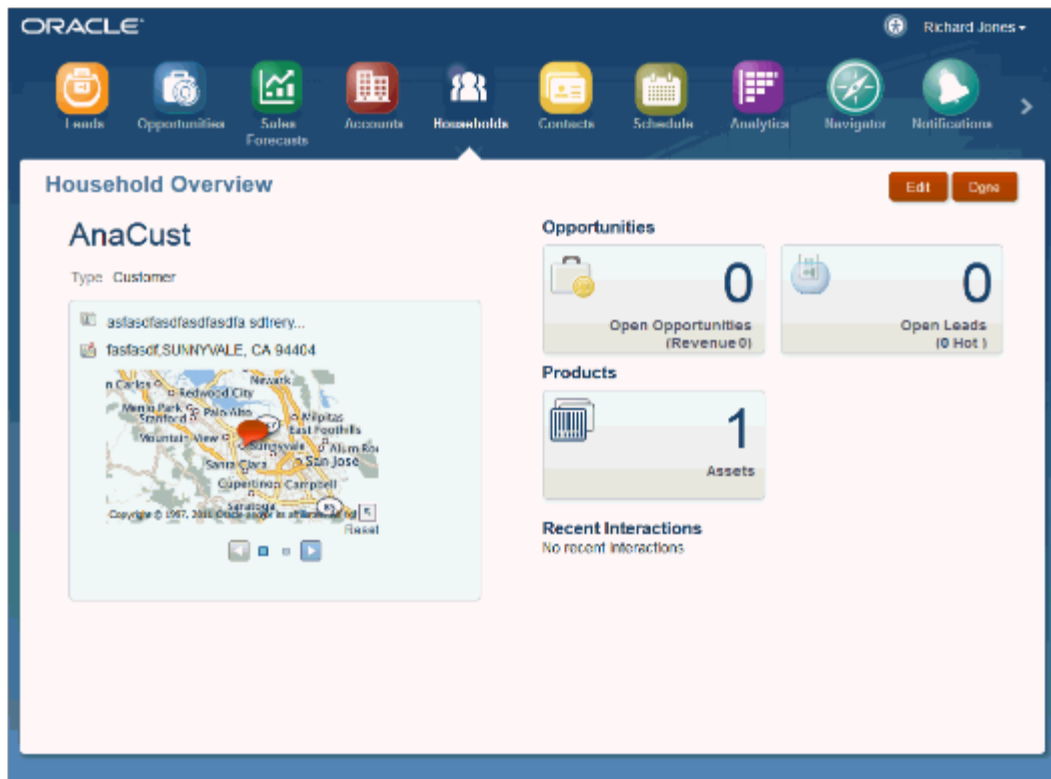
## Viewing the Changes in the Create Asset Page

In this section, we test whether the field **Asset Number** that we added to the Create Asset page appears at run time.

1. Login to the Application Pages main page and click **Households**.

2. Select a household that has a customer type.

This figure shows the Household overview page with the details of the selected household.



3. Click the number in the Assets region.

4. In the Edit Household page, click the **Create Asset** button.

This figure shows the Edit Household page for the selected item. You can create an asset from this page. The Create Asset button is visible only if you have the Asset Creation privilege.

5. The field **Asset Number** that you added using Application Composer now appears at the bottom of the Create Asset page.

This figure shows the Create Asset page with the field Asset Number that we added as part of extending the

Asset object.

#### Related Topics

- [Extend Pages for Assets](#)





# 44 Extend Activities

## Extend Application Pages for Activities

Use Application Composer to change the items that appear on the application set of pages for activities.

You can make changes to the following pages:

- Activities landing page
- Create Task
- Create Appointment
- Create Call Report
- Edit Task
- Edit Appointment
- Edit Call Report
- My Tasks
- My Appointments
- Activities subtab, available from the details pages of other objects, such as opportunity, account, contact, and so on.

For example, you can:

- Hide or show existing fields.
- Reorder columns.
- Change column labels.
- Add custom fields (all types).

### Activities Landing Page

To extend the Activities landing page:

1. Navigate to the Activity object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, in the Landing Page Layouts region, Activities area, copy the standard layout and edit the resulting copy.
4. Edit the **My Activity Overview Table** page.

### Create Task, Create Appointment, and Create Call Report Pages

To extend the Create Task, Create Appointment, and Create Call Report pages:

1. Navigate to the Activity object in Application Composer.
2. Select the **Pages** node.

3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout for either the Create Task, Create Appointment, or Create Call Report page to create a new layout to edit. Or, edit another existing layout.  
To enhance run time usability for your end users, optionally group custom fields into field groups.

## Edit Task, Edit Appointment, and Edit Call Report Pages

The Edit Task, Edit Appointment, and Edit Call Report pages consist of multiple subtabs that display along the left side of the page. You can modify most of these subtabs. You can also add custom subtabs to display records from child or related objects, for example.

To extend the Edit Task, Edit Appointment, and Edit Call Report pages:

1. Navigate to the Activity object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout for either the Edit Task, Edit Appointment, or Edit Call Report page to create a new layout to edit. Or, edit another existing layout.
4. When making changes to the Edit Task, Edit Appointment, and Edit Call Report pages, select the subtab you want to change first. The following subtabs are available from the Edit Task, Edit Appointment, and Edit Call Report pages. Use the following subtabs to configure which standard and custom fields display at run time.

**Tip:** The changes you make to these subtabs are unique across the Edit Task, Edit Appointment, and Edit Call Report pages. For example, the changes you make to the Contacts subtab on the Edit Task page aren't reflected on the Contacts subtab on the Edit Appointment page.

- o Summary
- o Contacts  
Use the Activity Contact child object to add custom fields as needed, before you can select them for display on the subtab.
- o Resources  
Use the Activity Assignee child object to add custom fields as needed, before you can select them for display on the subtab.
- o Notes  
Use the Note object in Application Composer to create custom fields as needed, and to extend this subtab.  
On the Application Pages tab for the Note object, edit the default creation page layout or duplicate it to create a new layout.  
The Notes list page isn't extensible.

## My Tasks Landing Page

To extend the My Tasks landing page:

1. Navigate to the Activity object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, in the Landing Page Layouts region, copy the standard layout and edit the resulting copy.
4. In the new layout, edit the **My Tasks Overview Table**

## My Appointments Landing Page

To extend the My Appointments page:

1. Navigate to the Activity object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, in the Landing Page Layouts region, copy the standard layout and edit the resulting copy.
4. In the new layout, edit the **My Appointments Overview Table**

## Embedded Activities Subtab

To extend the Activities subtab, available from the details pages of other objects:

1. Navigate to the Activity object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, in the Embedded Activity Summary Layout > Embedded Task List Read Only Overview Table or Embedded Task List Overview areas, copy the standard layout and edit the resulting copy.
4. In the new layout, edit the **Embedded Task List Read Only Overview Table** or the **Embedded Task List Overview Table**.



# 45 Extend Leads and Campaigns

## Overview of Extending Sales Lead and Marketing Campaign Objects

Read this chapter to learn about extending the sales lead and marketing campaign objects and pages in your sales application.

In this chapter, you will learn:

- How to modify leads pages
- How to create a sales lead validation rule using Application Composer
- How to extend campaigns and leads using data from Oracle Marketing Cloud
- How to create new objects by copying existing objects using the Copy Map feature
- How to map child objects and attributes in the source object to objects and attributes in the new object

### *Related Topics*

- [How to Create a Sales Lead Validation Rule Using Application Composer](#)
- [Example of Modifying the Lead to Opportunity Copy Map](#)

## Overview of Campaign Management and Reporting

You can store marketing related data, such as campaigns and campaign members created and updated in Oracle Marketing Cloud, also called Oracle Eloqua, in your sales application.

Campaign management and reporting is greatly improved by having campaign related data maintained and synchronized between Oracle Marketing Cloud and Oracle CX Sales.

You can view meaningful information about marketing campaigns and campaign members from the Campaigns user interface. The Campaigns UI provides visibility into the campaign effectiveness to support the sales processes. For example, you can view the campaigns and campaign members associated with a given lead and contact to gain key insights for closing a sale.

In addition, your administrator can also display a campaigns subtab and an Add to Campaign button on the Leads and Contacts user interface pages from where you can view data about the marketing campaigns and add the associated leads and contacts to the campaign. The functional security privilege MKT\_MANAGE\_MARKETING\_INTEGRATION\_CAMPAIGN\_MEMBER must be assigned to the intended user or their role.

**Note:** If you want users to have access only to Marketing Campaigns without granting them additional roles to other objects, then you can create a custom access group. Access groups are an alternative way of granting data permissions to users, and they use a different access path to that provided by the predefined data security policies. For more information, see the Create a Custom Access Group topic in the Securing Sales and Fusion Service guide.

The topic describes how to create an access group, create object sharing rules to give group members access to object data, and add members to the group. For the object sharing rules, use the **All Marketing Campaigns** predefined rule which gives full access to campaign records. You can create a group membership rule to add members to your access group based on user name, role, organization and so on. For more information, see the *Create Membership Rules for Custom Access Groups* topic in the *Securing Sales and Fusion Service* guide.

You can add contacts or leads to marketing campaigns from these locations within your sales application:

- Campaigns subtab on the Edit Contact page
- Campaigns subtab on the Edit Lead page
- Campaign Members subtab on the View Campaign page
- Contact and Lead saved search pages in Workspace

Use the campaign summary data to view associated leads, contacts, opportunities, and revenue amounts. You can add contacts and leads to marketing campaigns, and view only already added contacts or leads through the Campaign Members subtab. The total number responding to a campaign represents the total count of campaign members who have responded to a marketing campaign and can only be viewed from the Analytics subtab. Campaign members include either leads or contacts that were sent or responded to a marketing campaign and have a status of Responded or Sent. Note that the response is only counted once even when a campaign member has responded multiple times to the same campaign.

#### *Related Topics*

- [Enable the Campaigns Subtab and Add to Campaign Button in Leads](#)
- [Enable the Campaigns Subtab and Add to Campaign Button in Contacts](#)
- [Enable the Campaign Analytics Tab in Campaigns List Page](#)
- [About Campaign Management Reports](#)

## Sales Leads

### Extend Pages for Leads

Using Application Composer, you can change many items that appear on the pages for sales leads.

Use Application Composer to modify these pages:

- Leads landing page (Landing Page Layouts)
- Create Lead page (Creation Page Layouts)
- Edit Lead page (Details Page Layouts)
- Lead Email notifications page (Lead Notification Content)
- Mass Lead Convert page (Mass Lead Convert Page Layouts)
- Lead Convert page (Lead Convert Page Layouts)

For example, you can:

- Hide or show standard fields.

- Set fields as required.
- Set field default values.
- Reorder columns.
- Change column labels.
- Add user-defined fields (all types).

**Note:** To extend the set of pages for leads, use the Sales Lead object in Application Composer. You must be working in an active sandbox.

## Leads Landing Page

You can extend items that appears on the Leads landing page. For example, you can hide standard fields or show user-defined fields. To modify this page:

1. Navigate to the Sales Lead object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Landing Page Layouts, duplicate the standard layout to create a new layout.

## Create Lead Page

You can modify the Create Lead page. For example, you can hide standard fields, make a field required, add a default value, and show user-defined fields. To modify the Create Lead page:

1. Navigate to the Sales Lead object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

To enhance runtime usability for your end users, optionally group user-defined fields into field groups.

## Edit Lead Page

The Edit Lead page consists of multiple subtabs that display along the left side of the page. You can modify most of these subtabs. You can also add user-defined subtabs, for example, to display records from child or related objects.

To add user-defined fields to certain subtabs available from the Edit Lead page, you must first navigate to those subtab target objects in Application Composer to create the fields. After creating the fields on the target object, you can then navigate back to the details page layout for the Sales Lead object to add those fields to the specific subtabs.

To modify the Edit Lead page:

1. Navigate to the Sales Lead object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.
4. When making changes to the Edit Lead page, select the subtab you want to change first.

The changes you make to these subtabs are unique to the Edit Lead page. For example, you can extend the Sales Lead Products directly by adding new user-defined fields, but if you want to display those new fields, or hide existing fields for the Sales Lead Products object, you must navigate to the Sales Lead object, select Pages, and then go to the Details Page Layout, Summary subtab, Lead Details Products area.

Use these subtabs, available from the Edit Lead page, to configure which standard and user-defined fields display at runtime.

- Summary
- Contacts

Use the Sales Lead Contact object to create user-defined fields as needed.

- Qualification

Not extensible from this page.

- Sales Team

Use the Sales Lead Resources object to create user-defined fields as needed.

- Products

Use the Sales Lead Products object to create user-defined fields as needed.

- Activities

Use the Activity object in Application Composer to extend this subtab.

On the Application Pages tab for the Activity object, scroll down to the **Embedded Activity Summary Layout** section at the bottom of the page. Click the Standard layout or duplicate it to create a new layout.

- Responses

Not extensible from this page.

- Notes

Use the Note object in Application Composer to create user-defined fields as needed, and to extend this subtab.

On the Application Pages tab for the Note object, edit the default creation page layout or duplicate it to create a new layout.

The Notes list page isn't extensible.

- Opportunities

Use the Opportunity object to create user-defined fields as needed.

## Lead Email Notifications

The email notifications region is applicable only for partner leads. From here, you can configure actionable email content that's sent to users when partner leads are assigned. Use the Sales Lead object in Application Composer to extend the email notifications of the partner lead UI. On the Application Pages tab for the Sales Lead object, scroll down to the **Lead Notification Content** section at the bottom of the page. Click the Standard layout or duplicate it to create a new layout.

## Mass Lead Convert Page

Mass Lead Convert is a mass action available on Lead List page and is used for converting multiple selected leads simultaneously. When a salesperson uses the mass lead convert action, the Lead Mass Convert page is displayed for verification and input for the mass conversion process. You can add or remove standard or custom fields from the mass



lead convert page to your requirement. On the Application Pages tab, under Mass Lead Convert Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

## Lead Convert Page

Opportunity Name, Owner, Account and Primary Contact are exposed on the Lead Convert page. Account and Primary Contact are predefined read-only fields but they become editable fields if the Account and Primary Contact are directly typed into the lead and if they don't exist in the sales application.

You can add or remove standard or custom fields from the lead convert page to your requirement. On the Application Pages tab, under Lead Convert Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

### Related Topics

- [How do I enable mass update of records?](#)

## Example of Extending Pages for Leads Using Application Composer

You can extend lead pages using Application Composer. You must make your changes in a sandbox, so you can test them first.

This example demonstrates how you can extend the lead object by:

- Adding a check box to identify strategic leads
- Adding a Groovy script that checks if the size of the deal is greater than 1000 USD when a user saves a lead with this check box selected. If the deal is smaller than this amount, then users are prevented from saving the lead and receive an error message instead.

## Create the Strategic Deal Check Box and Add the Groovy Script Validation Check

Here's how to create the **Strategic Deal** check box and add the validation check:

1. Navigate to Application Composer. Select **Sales Lead** from the **Objects** panel.
2. Under the Lead object, select the **Fields** link.
3. Click the **Create a custom field** icon and, in the Select Field Type window, select **Check box**.
4. In the Create Check box Field page, enter "Strategic Deal" as the **Display Label**. Leave the rest of the fields with their default values.
5. Click **Save and Close**.
6. Next augment this new check box with a Groovy script. When the user attempts to save a record with the check box selected, then the script checks if the deal size is greater than 1000. If the deal size is less than 1000, then the script displays an error and the lead isn't saved.

Here is the Groovy logic that you can use:

```
def retVal
if (StrategicDeal_c == 'Y')
{
    if (DealAmount >= 1000)
    {
        retVal = true
    }
}
```

```

    }
    else
    {
        retVal = false
    }
}

if (StrategicDeal_c
== null || StrategicDeal_c
== 'N')
{
    retVal = true
}
return(retVal)

```

7. In the Objects panel, select **Server Scripts** under the **Sales Lead** object.
8. In the **Server Scripts Sales Lead** page, select the Validation Rules tab and under **Object Rules**, select **Action - Add** to add a new validation rule.
9. In the Create Object Validation Rule page, enter the rule name as *Eval* and enter a simple error message in the Error Message text region.
10. Cut and paste the script that you have written to validate the condition.
11. Next add this field to the sales lead application pages. In Application Composer, select the **Pages** link under the Sales Lead object and then select the Application Pages tab.
12. In the Details Page Layout region, duplicate the standard layout to create a new layout to edit.
13. Click the Edit pencil icon and select the **Strategic Deal** field.
14. Click **Done** and save and close Application Composer.
15. Sign in to the application again and drill into a lead.
16. Check if the **Strategic Deal** check box appears.

This figure shows an example of the Edit Lead Summary page with the Strategic Deal check box selected.

17. Enter a value less than 1000 in the **Deal Size** field.
18. Select the **Strategic Deal** check box and click **Save and Close**.

You should receive the error message that you entered in Step 9 because the deal size violates the validation rule.

19. Reenter a value greater than 1000 in the **Deal Size** field and save.

You have successfully extended a sales lead application page and added Groovy logic.

*Related Topics*

- [Overview of Sandboxes](#)

## How to Create a Sales Lead Validation Rule Using Application Composer

Lead management users can change the status of a lead to Qualified, regardless of whether the lead customer is a sales account or has a primary product associated with the lead.

However, to enforce compliance with your company's lead management business processes, you want to create business rules to control when to set a lead to a Qualified status.

This example describes how to use **Application Composer** to create a validation rule that ensures a sell-to address and a primary product exist before users change the lead's status to Qualified.

### Create a Validation Rule for Sell-to Address

Here's how to create a rule that validates the existence of a sell-to addresses for a sales lead:

1. Navigate to **Application Composer**.
2. Select **Sales** to filter the object search.
3. From the **Objects View**, select **Standard Objects, Sales Lead, Server Scripts**.
4. Click the **Object Functions** tab, and then click the **Add a New Object Function** icon. The **Create Object Function** page is displayed.
5. In the **Function Name** field, enter this name without spaces: `isSellToExists`.
6. In the **Returns** field, select **Boolean**.
7. In the **Function Body** area, enter the following:

```
if(null != CustomerId){ def partySites = newView('Address');
def criteria = partySites.createViewCriteria(); def criteriaRow = criteria.createRow();
criteria.insertRow(criteriaRow); def criteriaItem = criteriaRow.ensureCriteriaItem('PartyId');
criteriaItem.setValue(CustomerId) partySites.appendViewCriteria(criteria) partySites.executeQuery();
while(partySites.hasNext()) { def partySite = partySites.next(); def partySiteUses =
partySite?.getAttribute('PartySiteUse'); while (partySiteUses.hasNext()) { def partySiteUse =
partySiteUses.next(); if ('SELL_TO' == partySiteUse?.getAttribute('SiteUseType')) { return true; } } }
return false;
```
8. Click **Validate**.
9. Click **Save and Close**.

### Create an Enforcement Rule for Primary Product

Next, you want to create a rule for enforcing the primary product association for the sales lead.

1. Click the **Add a New Object Function** icon to go to the **Create Object Function** page.
2. In the **Function Name** field, enter the this name without spaces: `isPrimaryProductAssigned`.
3. In the **Returns** field, select **Boolean**.
4. In the **Function Body** area enter the following:

```
if((null != PrimaryInventoryOrgId && null !=
PrimaryInventoryItemId) || null != PrimaryProductGroupId) return true; else return false;
```
5. Click **Validate**.
6. Click **Save and Close** to return to the **Server Scripts Sales Lead** page.

## Create a Validation Rule for Lead Qualification

Next you want to create a validation rule that checks for the existence of a sell-to address and a primary product when a user sets the Qualified status for a sales lead.

1. Click the **Validation Rules** tab and from the **Object Rules** area.
2. Click the **Add a new validation rule** icon.
3. In the **Create Object Validation Rule** page navigate to the **Rule Name** field and enter this rule name without spaces: `qualifyLead`
4. In the **Rule Definition** area, enter the following: `if(isAttributeChanged('StatusCode') && getAttribute('StatusCode') == 'QUALIFIED') return (isPrimaryProductAssigned() && isSellToExists()); else return true;`
5. In the **Error Message** area, enter this message text: `Primary Product and Sell to Address are required for qualifying a Lead.`
6. Click **Save and Close**.  
This completes the task of using **Application Composer** to create validation rules for the primary product and sell-to address fields when qualifying a lead.

## Test the Rules

Here's how to validate the rules:

1. Navigate to the **Lead Qualification, Edit Lead** page.
2. From the **Actions** menu, select **Qualify**.  
If the **Primary Product** and **Sell to Address** fields contain no data, you should receive the following error message text:  
`Primary Product and Sell to Address are required for qualifying a Lead.`

## Example of Assigning Account Owner as the Owner of a Lead

You can configure your sales application to automatically set a lead owner based on the owner of the associated account.

For example, an employee in your organization who isn't a salesperson, has created a lead with an associated account. You can use a Groovy script to automatically assign that lead to the salesperson who owns the associated account.

You are a sales administrator and your management has asked you to create a script to automate setting the account owner as the lead owner after the lead is created or assigned. You can use Groovy scripts to cater for the these scenarios:

- When a lead is created with an associated account and the assignment process is run
- When a lead is created without an account, but the account is added later and the assignment process is run

**Note:** You can't set the account owner as the lead owner for leads created or updated using import management.

## Set Account Owner as the Lead Owner After Lead is Created or Assigned

Here's how to set the account owner as the lead owner after the lead is created or assigned:

1. Sign in using the sales administrator role.

2. Create a sandbox and activate it.  
For more information about sandboxes, see the Overview of Sandboxes topic.
3. Navigate to Application Composer and expand **Standard Objects**, then **Sales Lead** and then click **Server Scripts**.
4. Click the **Triggers** tab, and then click the Create icon in the **Object Triggers** section.
5. Select the **Before Insert in Database** trigger type. Enter a name such as `UpdatLeadOwnerOnCreate` in the **Trigger Name** field. Copy and paste the following content of the script to the **Trigger Definition** section:

```
if(nvl(CustomerId,null) != null)
{
    def account = newView('OrganizationProfile');
    def criteria = account?.createViewCriteria();
    def criteriaRow = criteria?.createRow();
    criteria?.insertRow(criteriaRow);
    def criteriaItem = criteriaRow?.ensureCriteriaItem('PartyId');
    criteriaItem?.setValue(CustomerId);
    account?.appendViewCriteria(criteria);
    account.executeQuery();
    if(account.hasNext())
    {
        def accRow = account.next();
        def leadResourceIterator = nvl(MklLeadResources,null);
        if(nvl(accRow?.OwnerPartyId,null) !=null)
        {
            setAttribute('OwnerId' , accRow?.OwnerPartyId);
            def resourceId = accRow?.OwnerPartyId;
            boolean alreadyOnSalesTeam = false;
            leadResourceIterator?.reset();
            for (; leadResourceIterator?.hasNext(); ) {
                def mklLeadResourcesVORowImpl = leadResourceIterator.next();
                Long existingResourceId = mklLeadResourcesVORowImpl.getAttribute('ResourceId');
                if (resourceId.equals(existingResourceId)) {
                    alreadyOnSalesTeam = true;
                    break;
                }
            }
            if(!alreadyOnSalesTeam) {
                def leadResourceVO = leadResourceIterator.createRow();
                leadResourceVO.setAttribute('LeadId',LeadId);
                leadResourceVO.setAttribute('ResourceId',resourceId);
                leadResourceVO.setAttribute('PrimaryFlag','Y');
            }
        }
    }
}
```

6. Click **Save and Close**. Verify that you see the newly created trigger in the **Object Triggers** section.
7. Next, click the Create icon in the **Object Triggers** section to create another object trigger.
8. Select **Before Update in Database** trigger type. Enter a name such as `UpdatLeadOwnerOnUpdate` in the **Trigger Name** field. Copy and paste the following content of the script to the **Trigger Definition** section:

```
if(isAttributeChanged('LastAssignmentDate')){
    def account = newView('OrganizationProfile');
    def criteria = account?.createViewCriteria();
    def criteriaRow = criteria?.createRow();
    criteria?.insertRow(criteriaRow);
    def criteriaItem = criteriaRow?.ensureCriteriaItem('PartyId');
    criteriaItem?.setValue(CustomerId);
    account?.appendViewCriteria(criteria);
    account.executeQuery();
    if(account.hasNext())
    {
```

```
def accRow = account.next();
def leadResourceIterator = nvl(MklLeadResources,null);
if(nvl(accRow?.OwnerPartyId,null) !=null) {
    {
        setAttribute('OwnerId' , accRow?.OwnerPartyId);
        def resourceId = accRow?.OwnerPartyId;
        boolean alreadyOnSalesTeam = false;
        leadResourceIterator?.reset();
        for (; leadResourceIterator?.hasNext(); ) {
            def mklLeadResourcesVORowImpl = leadResourceIterator.next();
            Long existingResourceId = mklLeadResourcesVORowImpl.getAttribute('ResourceId');
            if (resourceId.equals(existingResourceId)) {
                alreadyOnSalesTeam = true;
                break;
            }
        }
        if(!alreadyOnSalesTeam) {
            def leadResourceVO = leadResourceIterator.createRow();
            leadResourceVO.setAttribute('LeadId',LeadId);
            leadResourceVO.setAttribute('ResourceId',resourceId);
            leadResourceVO.setAttribute('PrimaryFlag','Y');
        }
    }
}
```

9. Click **Save and Close**. Verify that you see the newly created trigger in the **Object Triggers** section.
10. Thoroughly test these scenarios in your sandbox environment:
  - When a lead is created with an associated account and the assignment process is run.
  - When a lead is created without an account, but the account is added later and the assignment process is run.
11. Publish the sandbox after successfully verifying your tests.

#### Related Topics

- [Overview of Sandboxes](#)

## How to Modify the Leads UI for Sales Prospects

Since leads for sales prospects represent contacts with potential buying interest, some customers want to hide the lead name from the UI. Instead, they want to set the primary contact field as required, and use the primary contact as the lead identifier.

Use application composer and object triggers to cater for these configuration tasks:

- Set the Primary Contact field as required
- Mark the name field as hidden in both the create and edit lead pages
- Automatically populate the lead name with the primary contact value when a lead is created and updated

**Note:** Sign in using the sales administrator role and create a sandbox and activate it.

## Set Primary Contact Field as Required

Here's how to set the primary contact field as mandatory on the leads UI:

1. Navigate to Application Composer and expand **Standard Objects**, then **Sales Lead** and then click **Fields**.
2. Search for the **Primary Contact** field of type **Dynamic Choice List**.
3. From the **Edit Standard Field: Primary Contact** page, under the **Constraints** section, select the **Required** check box.
4. Click **Save and Close**.

## Hide the Name Field

Here's how to hide the Name field on the leads UI:

1. Navigate to Application Composer and expand **Standard Objects**, then **Sales Lead** and then click **Pages**.
2. Navigate to **Sales Lead > Pages > Creation Page Layout > Create a Duplicate Layout** page.
3. From the **Creation Page Layout** section, select **Duplicate Layout** from the **Actions** menu.
4. In the **Duplicate Layout** dialog, enter **Default User-Defined Layout** in the **New Layout Name** field.
5. Click **Save and Edit**.
6. Click the **Edit** icon to display the **Configure Detail Form**.
7. Move **Name** from **Selected Fields** list to **Available Fields** list.
8. Click **Save and Close**, then click **Done**.
9. Repeat steps 4 to 9 to edit the **Details Page Layout** section.

## Populate the Lead Name with the Primary Contact Value

Here's how to populate the lead name with the primary contact value when a lead is created and updated:

1. Navigate to Application Composer and expand **Standard Objects**, then **Sales Lead** and then click **Server Scripts**.
2. Click the **Triggers** tab, and then click the **Add a new Trigger** icon in the **Object Triggers** section.
3. In the **Trigger** field, select the **Before Insert in Database** trigger type.
4. In the **Trigger Name** field, enter a name, without spaces, such as **UpdatLeadOwnerOnCreate**.
5. Copy and paste the following content of the script to the **Trigger Definition** section:

```
if(PrimaryContactName == null)
{
    throw new oracle.jbo.ValidationException('Primary Contact is a required field. Please select a Primary Contact.')
}
else
{
    setAttribute('Name',PrimaryContactName)
}
```

6. Click **Save and Close**.  
Verify that you see the newly created trigger in the **Object Triggers** section.
7. Next, click the **Add a new Trigger** icon in the **Object Triggers** section to create another object trigger.
8. In the **Trigger** field, select the **Before Update in Database** trigger type.
9. In the **Trigger Name** field, enter a name such as **UpdatLeadOwnerOnUpdate**.
10. Copy and paste the following content of the script to the **Trigger Definition** section:

```
if(PrimaryContactName == null)
{
    throw new oracle.jbo.ValidationException('Primary Contact is a required field. Please select a Primary Contact.')
}
else if(isAttributeChanged('PrimaryContactName') && PrimaryContactName != null)
```

```
{  
  setAttribute('Name', PrimaryContactName)  
}
```

11. Click **Save and Close**.  
Verify that you see the newly created trigger in the **Object Triggers** section.
12. Thoroughly test all changes in your sandbox environment.
13. Publish the sandbox after successfully verifying your tests.

## Add Customer Type to Leads List Page

As part of the Lead Management feature for repeat business leads, salespeople use the Existing Account and Existing Contact fields in the Leads UI which supports extensible picker features. In addition, the Existing Account field represents the same field as an account, contact or household.

Here's how to add the **Customer Type** field to the Lead List page using Application Composer

1. Navigate to Application Composer from the Configuration category in the Navigator.
2. Expand the **Sales Lead** object that you want to add the field.
3. Click **Pages** and then select the **Application Pages** tab.
4. On the Details Page Layouts section, edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.
5. Edit the Summary region.
6. Select the **Customer Type** field from the list in the Available Fields region and move it to the Selected Fields region.
7. Click **Save and Close**.
8. Test the changes: Navigate to **Sales > Leads** as a user with access to the Leads List page, for example, as a salesperson and ensure you can see the **Customer Type** field.
9. Publish the sandbox.

### Related Topics

- [Define Fields](#)
- [Overview of Sandboxes](#)

## Add the Browse Catalog Button to Edit Lead Page

Sales administrators can add the Browse Catalog button to the edit lead page so that users can browse the sales catalog and view the product hierarchy.

This lets salespeople browse the sales catalog while editing a lead and select and add products or product groups to the lead.

**Note:** Before you can add the Browse Catalog button to the edit lead page, the profile option Browse Sales Catalog in Opportunities Enabled must be set to Y.

Use these steps to add the Browse Catalog button to the Edit Lead page.

1. Navigate to the Sales Lead object in Application Composer.
2. Ensure you're in a sandbox.



3. Select the Pages node.
4. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout to edit.
5. Select the **Summary** subtab on the Edit Lead page, scroll down to the **Fuse Lead Details Products** area, and click the **Edit** icon.
6. From the **Configure Detail Form: Buttons and Actions** region, move the Browse Catalog item from the Available Buttons area to the Selected Buttons area.
7. Click **Save and Close**.
8. On the Details Layout page, click **Done**.
9. Verify that you can see the **Browse Catalog** button on the Edit Lead Summary page for a draft lead.
10. Publish your sandbox.

#### Related Topics

- [Enable Salespeople to Browse the Catalog](#)

## Configure Default Search on Standard Subtabs for Leads

You can add default search criteria to standard subtabs for leads so that your salespeople can more easily find the subtab data that's relevant to their daily activities.

When a user opens the subtab at runtime, the records displayed are automatically filtered using the added. Users can change the default search value, but they can't change the default search field. They can, however, further refine their search by adding additional search fields and values at runtime.

Adding a default search filter to a subtab is optional. If you skip this step, then no search fields are automatically added to the subtab, but users can still see the search region and perform their desired search.

Use this procedure to add a default search filter field, operator, and value for the Contacts subtab search on the Edit Lead page.

**Note:** You can select only one default search filter for each subtab. When adding a default search filter to standard subtabs, note that the search filter applies to all existing details page layouts with this subtab. Let's say you add a search filter to the Lead subtab on an Opportunity details page layout. This means that the same search filter is added to the Lead subtab on an Account details page layout.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Sales Lead**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.
8. In the **Subtabs Region**, highlight **Contacts** and click the pencil icon.
9. From the **Configure Detail Form** page region, go to the **Configure Summary Table: Search Region**.
10. Select the default search filter to apply to the Contacts subtab.  
You can select from a list of both standard and custom Contact fields. Note that you can't pick dynamic choice list fields, set ID-based fixed choice list fields, and any fields that aren't searchable. Also, if this subtab was

added based on a many-to-many (M:M) relationship, then you can select from only those intersection object fields that are already displayed on the subtab.

For example, you want to create a search filter to search for all contacts that have a job title of sales manager. Select **Job Title** from the drop-down list and select **Equals** as the operator and enter Sales Manager.

11. Click **Done** and ensure that the layout status for your Contacts subtab layout is set to Active.
12. Test the changes: Navigate to **Sales > Leads** as a user with access to the leads pages. Edit a lead and confirm that the data that displays on the Contacts subtab includes only contacts with a job title of sales manager.
13. Publish the sandbox.

#### Related Topics

- [Overview of Subtabs](#)

## Extend Lead-Related Actions for Workspace

You can specify and modify some lead-specific actions that your salespeople can quickly access from Workspace. These lead-related actions include the Assign Partner, Convert, Reject, Retire actions.

For example, you can modify the convert lead layout page and specify a reason and additional comment field for the retire and reject lead actions.

Here's how to enable the Lead actions on Workspace.

1. Create a sandbox and navigate to the Smart Actions administration tool in Application Composer, under Common Setup.
2. Using the **Actions** search box, look for the lead action that you want - Assign Partner, Convert, Reject, or Retire. The action you selected for the lead is displayed.
3. Click the check box under the **Enabled** column to make available the selected action from the Workspace saved searches.
4. If you make changes to predefined actions be sure to publish the sandbox, sign out of the application, and sign back in.
5. Verify your changes in Workspace.

Here's how to extend the Convert action dialog box.

1. Create a sandbox and navigate to **Standard Objects > Sales Lead > Pages** in Application Composer.
2. In the Lead Convert Page Layouts section under the Application Pages tab, duplicate the Standard layout.
3. Edit the duplicated layout to extend the lead convert action with the changes you want.
4. Publish the sandbox, sign out of the application, and sign back in.
5. Verify your changes in Workspace.

**Note:** Workspace requires a few moments to index new or modified information. For example, you perform a successful lead to opportunity conversion and you notice that the lead record displays a status of Unqualified. Close the list and in a few moments when indexing is complete for the converted lead record, return again and note that the record status has changed to Converted.

#### Related Topics

- [Manage Workspace Smart Actions](#)
- [Overview of Smart Actions](#)

## Extend Search Region and Results for Leads

You can extend the search and select dialog layout for leads in your Sales application. Use Application Composer to modify and set custom values that suit your requirements for the search parameters in the lead extensible reusable region.

By extending the search and select dialog layout for your leads, you can tailor your search to suit your own business requirements.

Use this procedure to extend the search region and results for your leads search.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Sales Lead**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. Under the Reusable Regions section, duplicate the Search and Select Dialog Layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
The Edit Search and Select Layout page appears.
8. Next to the **Search Region**, click the pencil icon.
9. Under the **Configure Search Region**, select the fields to appear in the search region and move them from the Available Fields area to the Selected Fields area.
10. Click **Save and Close** to return to the Edit Search and Select Dialog Layout page.
11. Next to the **Search Results**, click the pencil icon.
12. Under the **Configure Detail Form**, select the fields to appear in the search results and move them from the Available Fields area to the Selected Fields area.
13. Click **Save and Close**.
14. Click **Done** and ensure that the layout status for your Search and Select Dialog Layout is set to Active.
15. Test the changes: Navigate to **Sales > Leads** as a user with access to the leads pages. Perform a search for leads and confirm that the fields you selected appear in the search and results region for your search.
16. Publish the sandbox.

## Groovy Support to Make Reject Reason and Comment Fields Mandatory

You can use Groovy scripts to specify rules to force both the Reject Reason and Comment fields to be set as mandatory fields for your lead records.

The following is a sample of code to insert before the Lead update trigger to ensure that salespeople enter a reject reason and a comment for the lead:

```
if ((RejectReasonCode == null || RejectReasonCode == ''))
{
    throw new oracle.jbo.ValidationException('Reason is Mandate')
}
else if (RejectComment == null || RejectComment == '')
{

```

```
throw new oracle.jbo.ValidationException('Comment is Mandate')
}
else
return true
```

For more information about Groovy scripting, see the [Oracle Applications Cloud Groovy Scripting Reference](#).

### Related Topics

## Insert a Groovy Script to Prevent Users Creating Duplicate Leads

Use a groovy script to prevent users from creating duplicate leads. You write groovy scripts using Application Composer's expression builder, which appears in many places as you modify existing objects or create new custom ones.

You can create a groovy script on the Sales Lead object in Application Composer to prevent salespeople from creating duplicate leads by checking if the phone number or email for a lead already exists in your sales application.

The following is a sample of code to insert before the Lead update trigger to ensure that salespeople can't create duplicated leads. The script checks against leads created over a period of 30 days but you can modify the script to extend or limit the checks to a period of time of your choice.

```
def vo = newView('Lead')
def vc = newViewCriteria(vo)
def vcr = vc.createRow()
def vci_1 = vcr.ensureCriteriaItem('LeadId')
vci_1.setOperator('!=')
vci_1.setValue(LeadId)
def vci_2 = vcr.ensureCriteriaItem('LeadAging')
vci_2.setOperator('<')
vci_2.setValue(30)
def vci_3 = vcr.ensureCriteriaItem('PrimaryPhoneNumber')
vci_3.setOperator('=')
vci_3.setValue(PrimaryPhoneNumber)
def vci_4 = vcr.ensureCriteriaItem('ContactEmail')
vci_4.setOperator('=')
vci_4.setValue(ContactEmail)
vc.insertRow(vcr)
vo.appendViewCriteria(vc)
vo.executeQuery()
def count=vo.getEstimatedRowCount()
if (vo.hasNext() && count>0){
    throw new oracle.jbo.ValidationException('A lead record with the same phone number and email already exists!')
}
```

For more information about groovy scripting, see the [Oracle Applications Cloud Groovy Scripting Reference](#).

## Send Automatic Emails to New Lead Contacts

When entering net new leads, salespeople can add brand new contacts who don't yet exist in the application. These new contacts don't become "official" contacts until after leads are converted to opportunities.

This means that, when activities are created for net new leads, the associated new contacts won't receive automatic email notifications. You can, however, set up automatic email notification so that new contacts are kept informed of important activities on the lead, such as new appointments.

Setting up automatic email notifications involves a few configuration steps on the Activity object:

1. Create an email template.
2. Create two custom fields.
3. Create an object workflow.

Let's look at these steps in detail.

## Create the Email Template

Outside an active sandbox, create an email template on the Activity object.

1. In Application Composer, navigate Common Setup > Email Templates.
2. Click the **Create** icon.
3. Select the Activity object.
4. Enter a template name and then enter the template details, such as the email subject and body, for the desired notification.
5. Click **Save and Close**.

## Create Custom Fields

Next, create two custom fields on the Activity object. One field captures the new contact's email address. The other field captures the type of Leads UI that the customer is using.

1. Enter a sandbox and, in Application Composer, navigate Standard Objects > Activity > Fields.
2. Click the **Create a custom field** icon.
3. Select the Formula option, then **OK**.
4. Create the email field on the Activity object:

| Field Attribute                      | Value                                                     |
|--------------------------------------|-----------------------------------------------------------|
| Field type                           | Formula (text type)                                       |
| Display name                         | Lead Contact Email                                        |
| API name                             | LeadContactEmail_c                                        |
| Script                               | <code>return LeadVOVA?.PrimaryContactEmailAddress;</code> |
| Include in Service Payload check box | Selected                                                  |

5. Create the UI indicator field on the Activity object. You create the field to check the type of Leads UI that the customer is using.

| Field Attribute                      | Value                                                  |
|--------------------------------------|--------------------------------------------------------|
| Field type                           | Formula (text type)                                    |
| Display name                         | Lead Simplified Indicator                              |
| API name                             | LeadSimplifiedIndicator_c                              |
| Script                               | <code>return LeadVOVA?.SimplifiedLeadIndicator;</code> |
| Include in Service Payload check box | Selected                                               |

## Create the Object Workflow

Now that you've created the email template and custom fields on the Activity object, create an object workflow to send automatic email notifications to new lead contacts.

1. Still inside your sandbox, in Application Composer, navigate Common Setup > Object Workflows.
2. Click **Actions > Create**.
3. Select the Activity object and enter the object workflow name.
4. Enter the condition that must be true before the object workflow executes:

```
if (LeadContactEmail_c != null && LeadSimplifiedIndicator_c == 'Y' ) {  
  return true;  
} else {  
  return false;  
}
```

5. In the Actions region, click **Create** next to **Email Notification**.
6. Enter the email notification name and details, including the email template that you previously created.
7. Click **Save > Save and Close**.

When a new activity is created on a lead, an automatic email notification will be sent if the lead was created in the simplified UI with a brand new contact.

## Enable Contact Phone for Leads Click-to-Dial Using Page Composer

Click-to-dial is a feature that supports outbound dialing directly from your sales application. Once enabled, salespeople can perform outbound dialing through the contact phone numbers from sales lead pages.

You can quickly and easily make an outbound call to a contact lead directly by clicking a phone icon enabled for click-to-dial from the Leads UI. You use Page Composer to enable the contact phone field on the Summary area of the Edit Leads page.

Here's how to add the click-to-dial icon for the **Contact Phone** field to the Edit Lead summary page using Page Composer:

1. Sign in to the application as a user with the Sales Administrator job role. Or, sign in as a setup user.
2. Create and enter a sandbox by selecting Application Composer and Page Composer.
3. Activate a sandbox. The active sandbox name appears at the top of the page.
4. Navigate to **Application Composer > Objects > Standard Objects > Sales Lead > Pages**.
5. Under the **Details Page Layouts** section, highlight the **Standard Layout** record, then click **Actions > Duplicate**.
6. In the Duplicate Layout dialog window, enter a new layout name and click **Save and Close**.
7. Next, open Page Composer by selecting Page Composer from the Tools menu.
8. Click your user image or name in the global header, and on the Settings and Actions menu, select Edit Pages.
9. With Page Composer in Direct Selection mode, in the Summary tab of the edit lead page, hover over the **Contact Country Code**, **Area Code**, and **Phone** fields.  
A colored box appears around each field and its label.
10. Click inside the box around the **Contact Country Code**, **Area Code**, and **Phone** fields.
11. A dialog box opens with two options:
  - Edit Component
  - Edit Parent Component.
12. Select the **Edit Component** option.
13. In the Component Properties dialog box, click the **Children** tab.
14. Select the check box next to the **clickToDial** item.
15. Click **Apply**.
16. Click **OK** and close Page Composer.
17. Publish the sandbox according to your company's business practices.

For more information about using Page Composer, see the Configuring and Extending Applications guide.

#### Related Topics

- [Expose New Account and New Contact Fields for Leads](#)

## How to Add the Interactions History Subtab to Leads

You can view interactions history associated with your leads through the **Edit Lead: Interactions History** subtab.

The Interactions History subtab is hidden by default but you can make it available to your users through Application Composer.

Here's how to add the Interactions History subtab to the Edit Lead page.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Sales Leads**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.

6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.
8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.  
The Configure Subtabs dialog box appears.
9. Move **Interactions History** from the Available Subtabs to the Selected Subtabs window.
10. Click **OK**.
11. Click **Save and Close**.
12. Click **Done** and ensure that the layout status for your user-defined layout is Active.
13. Test the changes: Navigate to **Sales > Leads** as a user with access to the lead pages, for example, as a salesperson. Edit a lead and ensure you can see the Interactions History subtab in the Edit Lead page.
14. Publish the sandbox.

For more information, see the Subtabs topic in the Configuring Applications Using Application Composer guide.

## Marketing Campaigns and Campaign Members

### Overview of Campaign Management and Reporting

You can store marketing related data, such as campaigns and campaign members created and updated in Oracle Marketing Cloud, also called Oracle Eloqua, in your sales application.

Campaign management and reporting is greatly improved by having campaign related data maintained and synchronized between Oracle Marketing Cloud and Oracle CX Sales.

You can view meaningful information about marketing campaigns and campaign members from the Campaigns user interface. The Campaigns UI provides visibility into the campaign effectiveness to support the sales processes. For example, you can view the campaigns and campaign members associated with a given lead and contact to gain key insights for closing a sale.

In addition, your administrator can also display a campaigns subtab and an Add to Campaign button on the Leads and Contacts user interface pages from where you can view data about the marketing campaigns and add the associated leads and contacts to the campaign. The functional security privilege MKT\_MANAGE\_MARKETING\_INTEGRATION\_CAMPAIGN\_MEMBER must be assigned to the intended user or their role.

**Note:** If you want users to have access only to Marketing Campaigns without granting them additional roles to other objects, then you can create a custom access group. Access groups are an alternative way of granting data permissions to users, and they use a different access path to that provided by the predefined data security policies. For more information, see the Create a Custom Access Group topic in the Securing Sales and Fusion Service guide.

The topic describes how to create an access group, create object sharing rules to give group members access to object data, and add members to the group. For the object sharing rules, use the **All Marketing Campaigns** predefined rule which gives full access to campaign records. You can create a group membership rule to add members to your access



group based on user name, role, organization and so on. For more information, see the Create Membership Rules for Custom Access Groups topic in the Securing Sales and Fusion Service guide.

You can add contacts or leads to marketing campaigns from these locations within your sales application:

- Campaigns subtab on the Edit Contact page
- Campaigns subtab on the Edit Lead page
- Campaign Members subtab on the View Campaign page
- Contact and Lead saved search pages in Workspace

Use the campaign summary data to view associated leads, contacts, opportunities, and revenue amounts. You can add contacts and leads to marketing campaigns, and view only already added contacts or leads through the Campaign Members subtab. The total number responding to a campaign represents the total count of campaign members who have responded to a marketing campaign and can only be viewed from the Analytics subtab. Campaign members include either leads or contacts that were sent or responded to a marketing campaign and have a status of Responded or Sent. Note that the response is only counted once even when a campaign member has responded multiple times to the same campaign.

#### *Related Topics*

- [Enable the Campaigns Subtab and Add to Campaign Button in Leads](#)
- [Enable the Campaigns Subtab and Add to Campaign Button in Contacts](#)
- [Enable the Campaign Analytics Tab in Campaigns List Page](#)
- [About Campaign Management Reports](#)

## Enable the Campaigns Subtab and Add to Campaign Button in Leads

View campaigns associated with your leads through the Edit Lead: Campaigns subtab. The Campaigns subtab and the Add to Campaign button are hidden by default but you can make them available to your users through Application Composer.

Users can then filter the Campaigns subtab by the following attributes: Name, Type, Start Date, End Date, Last Updated, and Status.

Before you expose the Campaigns subtab list and the Add to Campaign button in the Edit Lead page, ensure that the functional security privilege MKT\_MANAGE\_MARKETING\_INTEGRATION\_CAMPAIGN\_MEMBER is assigned to the intended user or their role. Alternatively, if you want users to have access only to Marketing Campaigns without granting them additional roles to other objects, then you can create a custom access group as outlined in the Create a Custom Access Group topic in the Securing CX Sales and B2B Service guide.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Sales Lead**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.

8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.  
The Configure Subtabs dialog box appears.
9. Move **Campaigns** from the Available Subtabs to the Selected Subtabs window.
10. Click **OK**.
11. In the Subtabs Region, select the newly added Campaigns subtab icon.
12. Click the pencil icon next to the **Fuse Lead Campaign Overview Region**.
13. From the **Configure Detail Form: Buttons and Actions** region, move **Add to Campaign** from the Available Buttons to the Selected Buttons window.
14. Click **Save and Close**.
15. Click **Done** and ensure that the layout status for your user-defined layout is Active.
16. Test the changes: Navigate to **Sales > Leads** as a user with access to the leads pages, for example, as a salesperson. Edit a lead and ensure you can see both the Campaigns subtab and the Add to Campaign button in the Edit Leads page.
17. Publish the sandbox.

For more information, see the Subtabs topic in the Configuring Applications Using Application Composer guide.

#### Related Topics

- [Overview of Campaign Management and Reporting](#)
- [Enable the Campaigns Subtab and Add to Campaign Button in Contacts](#)
- [Enable Campaign Members Subtab, Add Leads, and Add Contacts Buttons in Campaigns](#)
- [Overview of Sandboxes](#)

## Enable the Campaigns Subtab and Add to Campaign Button in Contacts

You can view campaigns associated with your contacts through the Edit Contacts: Campaigns subtab. The Campaigns subtab and the Add to Campaign button are hidden by default but you can make them available to you users through Application Composer.

They can then filter the Campaigns subtab by the following attributes: Name, Type, Start Date, End Date, Last Updated, and Status.

Before you expose the Campaigns subtab list and the Add to Campaign button in the Edit Contact page, ensure that the functional security privilege `MKT_MANAGE_MARKETING_INTEGRATION_CAMPAIGN_MEMBER` is assigned to the intended user or their role. Alternatively, if you want users to have access only to Marketing Campaigns without granting them additional roles to other objects, then you can create a custom access group as outlined in the Create a Custom Access Group topic in the Securing CX Sales and B2B Service guide.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Contact**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, go to the **Edit Contact** region and duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.

8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.  
The Configure Subtabs dialog box appears.
9. Move **Campaigns** from the Available Subtabs to the Selected Subtabs window.
10. Click **OK**.
11. In the Subtabs Region, select the newly added Campaigns subtab icon.
12. Click the pencil icon next to the **Fuse Contact Campaign Overview Region**.
13. From the **Configure Detail Form: Buttons and Actions** region, move **Add to Campaign** from the Available Buttons to the Selected Buttons window.
14. Click **Save and Close**.
15. Click **Done** and ensure that the layout status for your user-defined layout is Active.
16. Test the changes: Navigate to **Sales > Contacts** as a user with access to the contacts pages, for example, as a salesperson. Edit a contact and ensure you can see the Campaigns subtab and the Add to Campaign button in the Edit Contacts page.
17. Publish the sandbox.

For more information, see the Subtabs topic in the Configuring Applications Using Application Composer guide.

#### Related Topics

- [Overview of Campaign Management and Reporting](#)
- [Enable the Campaigns Subtab and Add to Campaign Button in Leads](#)
- [Enable Campaign Members Subtab, Add Leads, and Add Contacts Buttons in Campaigns](#)
- [Overview of Sandboxes](#)

## Enable Campaign Members Subtab, Add Leads, and Add Contacts Buttons in Campaigns

You can add contacts and leads to marketing campaigns, and view already added contacts or leads through the Campaign Members subtab.

The Campaigns Members subtab, in addition to the **Add Leads** and **Add Contacts** buttons, are hidden by default but you can make them available to your users through Application Composer.

Here's how to expose the Campaign Members subtab in the View Campaign page. The steps also include how to expose the Add Leads and Add Contacts buttons in the Campaign Members subtab.

**Note:** Make sure that the functional security privilege `MKT_MANAGE_MARKETING_INTEGRATION_CAMPAIGN_MEMBER` is assigned to the intended user or their role. Alternatively, if you want users to have access only to Marketing Campaigns without granting them additional roles to other objects, then you can create a custom access group as outlined in the Create a Custom Access Group topic in the Securing CX Sales and Fusion Service guide.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Campaigns**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.

7. Type a new layout name and click **Save and Edit**.

The Details Layout page appears.

8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.

The Configure Subtabs dialog box appears.

9. Move **Campaign Members** from the Available Subtabs to the Selected Subtabs window.

10. Click **OK**.

Follow the next steps to expose the Add Leads and Add Contacts buttons in the Campaign Members subtab.

11. In the Subtabs Region, select the newly exposed Campaign Members icon.
12. Click the pencil icon next to the **Campaign Member Region**.
13. From the **Configure Detail Form: Buttons and Actions** region, move both the **Add Leads** and **Add Contacts** from the Available Buttons to the Selected Buttons window.
14. Click **Save and Close**.
15. Click **Done** and ensure that the layout status for your user-defined layout is Active.
16. Test the changes: Navigate to **Sales > Campaigns** as a user with access to the campaign pages, for example, as a salesperson. View a campaign and ensure you can see the Campaign Members subtab and the Add Leads and Add Contacts button in the View Campaign page.
17. Publish the sandbox.

For more information, see the Subtabs topic in the Configuring Applications Using Application Composer guide.

#### Related Topics

- [Enable the Campaigns Subtab and Add to Campaign Button in Leads](#)
- [Enable the Campaigns Subtab and Add to Campaign Button in Contacts](#)

## Add Contacts and Leads from Your Workspace to Oracle Marketing Cloud

Salespeople can select contacts or leads from their Workspace saved searches and add them as campaign members to marketing campaigns. After the added contacts and leads are synchronized to the Marketing Cloud (Oracle Eloqua), they get added to the specified Oracle Eloqua marketing campaigns.

Before you start to add contacts and leads from your Workspace to Oracle Eloqua, ensure that the functional security privilege `MKT_MANAGE_MARKETING_INTEGRATION_CAMPAIGN_MEMBER` is assigned to the intended user or their role. Alternatively, if you want users to have access only to Marketing Campaigns without granting them additional roles to other objects, then you can create a custom access group as outlined in the Create a Custom Access Group topic in the Securing CX Sales and Fusion Service guide.

**Note:** You must set up the Campaign Member Import in the Oracle Sales Cloud Integration App in Oracle Eloqua. This enables Oracle Eloqua to synchronize the campaign members (leads and contacts) from your sales application.

1. Create a sandbox and navigate to the Smart Actions administration tool in Application Composer, under Common Setup.

Smart actions are actions that are specifically mapped to a client application, such as Workspace, and displayed to users only when specific conditions are met.

2. Using the **Actions** search box, look for the **Add to Campaign** action.  
Two system actions are displayed: one for the **Contact** object and one for the **Lead** object.
3. For each of the objects, select the **Enabled** check box.
4. Verify that the **Add to Campaign** action is available for both Contacts and Leads saved searches in Workspace.

## Enable the Campaign Analytics Tab in Campaigns List Page

You can view reports associated with marketing campaigns through the Analytics side tab from the Campaigns list page. The Analytics tab is hidden by default but you can make it available to your users through the Structure tool.

You can then filter the Analytics tab to display which user-defined or predefined campaign related reports to display to campaign users.

Here's how to expose the **Analytics** tab in the **Campaigns** list page.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Structure**, in the Configuration category.
4. In the Structure page, ensure that the Navigation Configuration tab is selected.
5. Expand the **Sales** node and click **Campaigns**.
6. From the Edit Page Entry: Campaigns page, select **Tabs**.
7. On the Campaign ROI Analytics row, change the value for visible column to **Yes**.
8. Test the changes: Navigate to **Sales > Campaigns** as a user with access to the campaigns pages, for example, as a salesperson. View the campaign and ensure you can see the Analytics side tab in the Campaigns list page.
9. Publish the sandbox.

Here's how to expose the user-defined Analytic subtabs in the Edit Campaign page.

1. Navigate to **Application Composer**, in the Configuration category.
2. In the navigation tree, expand **Standard Objects**, expand **Campaigns**, and click **Pages**.
3. Ensure that the **Application Pages** tab is selected.
4. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
5. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.
6. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.  
The Configure Subtabs dialog box appears.
7. Move **Analytics** from the Available Subtabs to the Selected Subtabs window.
8. Click **OK**.
9. Back in the Details Layout page, click **Done**.
10. Be sure that the layout status for your user-defined layout is Active.
11. Test the changes: Navigate to **Sales > Campaigns** as a user with access to the campaigns pages, for example, as a salesperson. View the campaign and ensure you can see the Analytics side tab in the Campaigns list page.
12. Publish the sandbox.

For more information, see the Subtabs topic in the Configuring Applications Using Application Composer guide.

### Related Topics

- [Overview of Sandboxes](#)

# Marketing Cloud Data

## Overview of Oracle CX Sales Configuration

You can extend leads and contacts in Oracle CX Sales to show the activity data collected by Oracle Marketing Cloud. This provides important marketing context to your sales representatives when they're perusing leads and contacts in CX Sales.

You can expose the Digital Profile Infolets to show highlights of the activity data. You can also configure Digital Profile and Interaction Data in CX Sales to leverage the Eloqua Profiler and Eloqua Engage sales tools. These tools enable you to gain deeper insights into contact profiles to effectively use marketing collateral in outbound sales communications.

You must have the Sales Administrator job role, and the Resource and Employee abstract roles, to access the integration functionality and perform the configuration tasks described in the following sections. The Sales Administrator job role is required to access Personally Identifiable Information (PII), such as email, or mobile phone data.

**Note:** Use the Manage Users work area, and not the Security Console, for creating Sales Cloud users. For information about creating users and provisioning them with the required job roles, see the Securing CX Sales and Fusion Service guide.

### *Related Topics*

## Options for Accessing Digital Data in Oracle Marketing Cloud

The integration enables you to access digital activity data maintained for users in Marketing Cloud from the CX Sales UI. Here are your options:

- Display an embedded Digital Profile infolet on the Contact - Overview page to display digital activity data for a contact.  
  
This infolet comes with the integration but must be made visible in the UI using Application Composer. For information, see the topic, How You Configure Access to the Digital Profile Infolet.
- Extend the integration by creating custom links to Oracle Eloqua Profiler for leads and to Oracle Eloqua Engage for contacts and leads, and then embed the links in the CX Sales UI.

For information, see the Digital Profile and Interaction Data section.

## Requirements for Accessing Digital Data

To view the digital profile infolets, you must have:

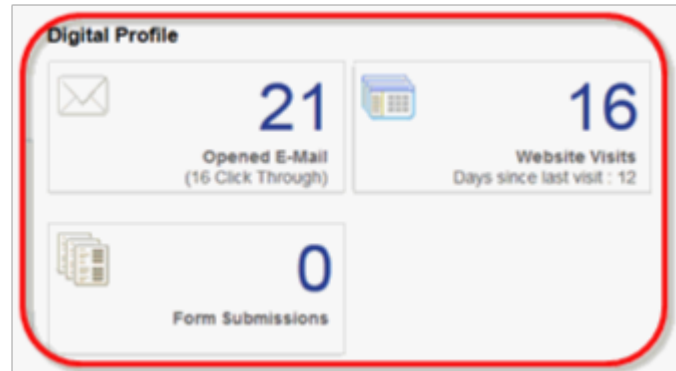
- User login accounts in both Oracle CX Sales and Oracle Marketing Cloud.
- The same email for use in both Marketing and CX Sales applications.

For information see the topic, How You Configure Access to the Digital Profile Infolet.

## How You Configure Access to the Digital Profile Infolet

You can enable the optional Digital Profile infolet to display on the CX Sales Edit Contact - Overview page.

The Digital Profile infolet shown in the following figure displays summary information about a contact's digital activities, such as the number of websites visited or form submissions made. These activities are captured by Eloqua (Oracle Marketing Cloud). You can also drill down on each activity type to access the Digital Profiler tool in Marketing Cloud



where detailed information for each activity is available.

To enable the Digital Profile infolet functionality you perform the following two steps:

- Set up a connection to Marketing Cloud.
- Display the infolet using Application Composer.

Both tasks are described in the following sections.

**Note:** Before you enable the Digital Profile infolet, make sure that the Dhttps and JSSE settings are enabled on your environment.

## Set Up a Connection to Oracle Marketing Cloud

In Oracle CX Sales, perform the following steps to set up a connection to Oracle Marketing Cloud.

1. Sign in as a sales administrator or as a setup user.
2. Navigate to the Setup and Maintenance work area.
3. Select the Sales offering, then search for the Manage Oracle CX Sales to Oracle Eloqua Integration task.
4. Select the task in the search results list, and then click **OK**.
5. Enter the values for the fields shown in this table to set up the connection to Marketing Cloud.

| Field | Value                                                                                                                                           |
|-------|-------------------------------------------------------------------------------------------------------------------------------------------------|
| URL   | If you're using Oracle CX Sales Release 12, patch bundle 10 or later, you must specify the following URL: <code>https://login.eloqua.com</code> |

| Field           | Value                                                                                                                                                                                                                                                                                                         |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Security Policy | For example: <code>oracle/wss_username_token_over_ssl_client_policy</code>                                                                                                                                                                                                                                    |
| User name       | <p>Enter the company name and user name used to connect to Oracle Marketing Cloud in the following format: <code>Company_Name\User_Name</code></p> <p>The user you specify must have a license for Oracle Eloqua Profiler and Oracle Eloqua Engage if you're configuring access to data from these tools.</p> |
| Password        | The password used to connect to Oracle Marketing Cloud.                                                                                                                                                                                                                                                       |

## Display the Digital Profile Infolet on the UI

Here's how to make the Digital Profile infolet visible on the Contact Overview page using Application Composer.

1. Sign in as a sales administrator or as a setup user.
2. Navigate to the Application Composer work area (**Navigator > Configuration > Application Composer**).
3. In the Objects area, expand **Standard Objects**, then expand the node for the **Contact** object and select **Pages**.
4. On the Application Pages tab, navigate to the Detailed Page Layouts section.
5. Edit the Default layout (or make a copy of the default layout if you prefer).
6. In the Subtabs region, select the Overview icon (the first icon in the list).
7. Click the Create Infolet Group icon, which is located near the end of the page.
8. On the Create Infolet Group page, enter a name for the new infolet in the **Infolet Group Name** field, for example, **Digital Activities**, or **Digital Profile**.
9. Shuttle the following infolets from the Available Infolets region to the Displayed Infolets region:
  - Form Submissions
  - Website Visits
  - Opened E-Mail
10. Click **Save and Close**.
11. Test your changes in the sandbox before publishing. For more information about sandboxes, see the topic Overview of Sandboxes in the Configuring Applications Using Application Composer guide.

### Related Topics

- [Overview of Sandboxes](#)



# Digital Profile and Interaction Data

## Overview of Creating Custom Links

You can create custom links in the Oracle CX Sales UI that users can click to access digital profile and interaction data maintained in Oracle Marketing Cloud for a contact or lead. To enable this functionality, you must:

1. Create custom links to Oracle Eloqua Profiler and Oracle Eloqua Engage (Lead object) or to Oracle Eloqua Engage (Contact object). For information, see the following topics:
  - Create Custom Links for the Sales Lead Object
  - Create a Custom Link for the Contact Object

**Note:** You don't have to create a custom link to Oracle Eloqua Profiler for the Contact object because the Digital Profile infolet provides this functionality. For information, see the Digital Profile and Interaction Data section.

2. Add the custom links to the CX Sales UI. For information, see the following topics:
  - Add Custom Links to the Sales Lead UI
  - Add the Custom Link to the Sales Contact UI

### Note:

Before you can access the responsive version of Profiler it must be installed in your Oracle Eloqua instance. Once installed, your administrator can configure the options that Profiler provides. See the Oracle Eloqua Help Center for more information.

You can embed the Eloqua Profiler and Eloqua Engage pages as subtabs in the CX Sales UI instead of creating links. For information about creating subtabs, see the section on Subtabs in the Configuring Applications Using Application Composer guide.

## Create Custom Links for the Sales Lead Object

Perform the steps in the following procedure to create custom links to Oracle Eloqua Profiler and Oracle Eloqua Engage for the Sales Lead object.

1. Sign in as an administrator or as a setup user.
2. Navigate to the Application Composer work area (**Navigator > Configuration > Application Composer**).
3. In the **Objects** area, expand **Standard Objects**, and then expand the node for the **Sales Lead Contacts** object.
4. Select **Actions and Links**
5. Create the link to Eloqua Engage:
  - a. In the Sales Lead Contacts: Actions and Links area, click the Create icon.
  - b. Set the value of the **Display Label** field to **Eloqua Engage**.

- c. Verify that the **Name** field is automatically set to **Eloqua\_Engage**.
  - d. To indicate the **Type** of item you want to create, click the **Link** radio button.
  - e. In the Script region, click the New icon.
  - f. In the expression text box, enter the Oracle Eloqua Engage URL with arguments as follows: `https://login.eloqua.com/autoLogin?LoginPrefix=<Your_Eloqua_Prefix>&Url=/apps/engage?sendTemplateToContacts/" + nvl (PersonEmail,"no email")` where `<Your_Eloqua_Prefix>` is the prefix of your Oracle Eloqua instance.
  - g. Validate the script by clicking the Validate icon.
  - h. If the script validates successfully, click the **Save** button.
6. Create the link to Eloqua Profiler:
  - a. In the Sales Lead Contacts: Actions and Links area, click the Create icon.
  - b. Set the value of the **Display Label** field to **Digital Profile**.
  - c. Verify that the **Name** field is automatically set to **Digital\_Profile**.
  - d. To indicate the **Type** of item you want to create, click the **Link** radio button.
  - e. In the Script region click the New icon.
  - f. In the expression text box, enter the Oracle Eloqua Profiler URL with arguments as follows: `https://login.eloqua.com/autoLogin?LoginPrefix=<Your_Eloqua_Prefix>&Url=/apps/profiler?emailAddress=" + nvl (PersonEmail,"no email")` where `<Your_Eloqua_Prefix>` is the prefix of your Oracle Eloqua instance.
  - g. Validate the script by clicking the Validate icon.
  - h. If the script validates successfully, click the **Save** button.

## Add Custom Links to the Sales Lead UI

Perform the steps in the following procedure to add the Eloqua Engage and Eloqua Profiler custom links you created for the Sales Lead object to the Sales Lead UI.

1. In Application Composer, in the Objects area, expand Standard Objects, then expand the node for the Sales Lead object.
2. Select Pages, and then click the Application Pages tab.
3. In the Details Page Layouts area, edit the Default Layout.
4. Edit the Summary area.
5. Move the custom links you created for Eloqua Engage and Eloqua Profiler from the Available Fields list to the Selected Fields list, and position them as required.
6. Click Save and Close, and then Done.

You can view the custom links on the Sales Edit Lead UI as shown in the following figure.

**Edit Lead: Green Server Interest: Summary**

Home: **Green Server Interest**

Account: **Applied Nicro Circuits Corp.** x

Primary Contact: **Aaron Riley**

Primary Product: **Green Servers**

Owner: **Lisa Jones**

Description:

Status: **Unqualified**

Rank: **Hot**

Currency: **USD**

Deal Size: **250,000.00**

Lead Score: **90**

Source: **Green Server Summer Campaign**

**Digital Profile**

**Eloqua Engage**

**Products**

| Product       | UOM | Quantity | Estimated Unit Price | Amount       |
|---------------|-----|----------|----------------------|--------------|
| Green Servers |     | 50       | 5,000.00             | 250,000.00 x |

**Basic Qualification**

Budget Amount: **300,000.00**

Budget Status: **Pending**

Time Frame: **3 months**

☐ Decision Maker Identified

Customer Project:

Customer Need:

## Create a Custom Link for the Contact Object

Perform the steps in the following procedure to create a custom link to Oracle Eloqua Engage for the Contact object.

You don't have to create a custom link to Oracle Eloqua Profiler for the Contact object because the Digital Profile infolet provides this functionality. For information, see the topic, [How You Configure Access to the Digital Profile Infolet](#).

1. Sign in as a sales administrator or as a setup user.
2. Navigate to the Application Composer work area (Navigator > Configuration > Application Composer).
3. In the Objects area, expand Standard Objects, expand the node for the Contact object, and then select Actions and Links.
4. Create the link to Eloqua Engage:
  - a. In the Contact: Actions and Links area, click the Create icon.
  - b. Set the value of the Display Label field to Eloqua Engage.
  - c. Verify that the Name field is automatically set to Eloqua\_Engage.
  - d. To indicate the Type of item you want to create, click the Link option. "https://login.eloqua.com/autoLogin?LoginPrefix=<Your\_Eloqua\_Prefix>&Url=/apps/engage?sendTemplateToContacts/" + nvl(PrimaryEmailAddress, "") where <Your\_Eloqua\_Prefix> is the prefix of your Oracle Eloqua instance. If you don't know what your prefix is, contact Oracle Eloqua Product Support.
  - e. In the expression text box, enter the Oracle Eloqua Engage URL with arguments as follows:
  - f. Validate the script by clicking the Validate icon.
  - g. If the script validates successfully, click Save.

*Related Topics*

## Add the Custom Link to the Sales Contact UI

Perform the steps in the following procedure to add the Eloqua Engage custom link you created for the Contact object to the CX Sales Contact UI.

1. In Application Composer, in the Objects area, expand Standard Objects, expand the node for the Contact object, and then select Pages.
2. Click the Application Pages tab.
3. In the Details Page Layouts area, edit the Default Layout.
4. Edit the Summary area.
5. Move the custom link you created for Eloqua Engage from the Available Fields area to the Selected Fields area, and position it as required.
6. Click Save and Close, and then Done.

You can view the custom link on the CX Sales Edit Contact UI as shown in this figure.

**Edit Contact: Aaron Riley: Profile**

Actions Save Save and Close Cancel

Prefix  First Name  Last Name  Middle Name  Mobile Phone  Work Phone  E-Mail  Account  Job Title  Influence Level

**Primary Address**

Country  Address Line 1  Address Line 2  Address Line 3

Affinity  Buying Role  Attachments  ☒ Favorite Contact

**Eloqua Engage** Facebook LinkedIn

Type ☐ Customer ☐ Prospect

City  State  Postal Code

# 46 Extend Microsoft 365

## Overview of Extending Microsoft 365 for Sales

Read this chapter to learn about configuring the Oracle Microsoft 365 add-in side panel.

Read this chapter to learn:

- How to configure the Microsoft 365 add-in side panel
- How to configure standard and custom objects

## Configure Oracle CX Sales for Microsoft 365

Use Application Composer to configure Oracle CX Sales for Microsoft 365 side panel.

You can manage the objects and fields that are visible on Oracle CX Sales for Microsoft 365 without having to carry out specific configurations for a particular object. Here are the tasks you can do:

- Set standard and custom objects to be visible on the side panel.
- Configure the header visible on the side panel.
- Configure the Related Records section on the side panel.
- Configure views within standard and custom objects.
- Add a role to a layout.

## Extensible Objects

Here are the objects that you can configure and the layouts within those objects that can be extended:

| Objects     | Extensible Layouts                                   |
|-------------|------------------------------------------------------|
| Appointment | Detail and Edit Layouts                              |
| Call Report | Detail and Edit Layouts                              |
| Task        | List, Detail, Edit, and Saved Search layouts         |
| Accounts    | List, Detail, Edit, Picker, and Saved Search layouts |
| Contacts    | List, Detail, Edit, Picker, and Saved Search layouts |
| Sales Leads | List, Detail, Edit, Picker, and Saved Search layouts |

| Objects               | Extensible Layouts                                   |
|-----------------------|------------------------------------------------------|
| Opportunities         | List, Detail, Edit, Picker, and Saved Search layouts |
| Resources             | List, Detail, and Picker layouts                     |
| Revenue               | List, Detail, and Edit layouts                       |
| Competitors           | Picker layout                                        |
| Opportunity Contacts  | List and Edit layouts                                |
| Opportunity Resources | List and Edit layouts                                |
| Sales Lead Resources  | List and Edit layouts                                |
| Sales Lead Contacts   | List and Edit layouts                                |

## Configure Oracle CX Sales for Microsoft 365 Using Application Composer

Open and create a sandbox and then you configure Oracle CX Sales for Microsoft 365 using Application Composer:

1. Sign in as the sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigator > Configuration > Application Composer**.
4. Select Productivity Applications Setup from the Overview region.
5. Select CX Cloud Microsoft 365.

You are taken to the setup page where you can configure the Oracle CX Sales for Microsoft 365.

## Create a Layout for a Feature

In the Oracle add-in, there are standard pages for capturing details such as user accounts and appointments. However, your business may need you to capture certain additional details for accounts or appointments which aren't available in the standard pages.

In such situations, you can create your own layouts for these pages in the Oracle sales cloud. The layouts can be in any of the following page view formats: List, Detail, Edit, Picker, or Saved Search. In your own layouts, you can add fields of your choice and also decide user access at form level or even at a field level.

Here are the steps to create a layout:

1. Sign in to your sales cloud as the sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigator > Configuration > Application Composer**.
4. In the Common Set up Menu, or on the Overview page, go to **Productivity Application Setup**, and then select **CX Cloud Microsoft 365**.

5. Expand the feature for which you want to create a new layout. For example, expand the **Accounts** feature.
6. Within that, expand the type of page view. For example, expand the **Detail** view.
7. Click the **Duplicate** icon. Give a name to your new layout. Ensure that the name speaks the purpose of the layout.
8. Click **OK**.
9. Select the **Active** icon to make your layout active.  
Once you have created the layout, you can configure the fields that are available, assign roles, add criteria to the layout.
10. Click **Save**.
11. Publish the sandbox.

#### Related Topics

- [Set Role Permissions on the Layouts You Created](#)
- [Create Advanced Criteria for a Layout](#)

## Configure the Microsoft 365 Side Panel

The side panel shows contact information and has links to related records.

### How Can I Configure the Contacts Header Section

You can configure what users can see on the Contacts header region. By default, the application shows the following: contact snapshot, name (if available), the account that the contact is associated with, and the job title. You can select additional fields to show on the header.

To configure the contact header:

1. Expand the **Side Panel**, and then expand **Header**.  
The Standard layout is the default layout and you can't modify this layout. This paradigm is true for all the features.
2. Click the **Duplicate** icon to create a layout that you can configure.
3. Enter the name of the layout and click **OK**.  
You can now modify the layout that you have created.
4. To add a field to layout, select the field from the **Available Fields** region. Drag and drop that field to the layout.
5. Click the **Cross** icon to remove a field from the layout.  
**Note:** You can also modify the order in which the fields are shown on the contact header. The contact snap and the name can't be removed from the header.
6. Activate the layout that you created.

### How Can I Configure the Related Records Section?

Here's how you can configure the Related Records section:

- Add or remove features.
- Create sorting logic for the features.

To create a sorting logic select the field on which the feature is sorted and also the order of the sort.

**Note:** This sort is only applicable to the side panel. You can't configure list view sort here.

- Create filter logic for the features.

## Set Role Permissions on the Layouts You Created

On the List, Edit, and Detail layouts you create, you can make few fields privileged to selective roles. For example, you can show few fields in the Accounts Detail page to the sales managers only and hide them from others.

### Add a Role to a Layout

Here is an example of how you can add the Sales Manager role to the Accounts Detail layout:

1. Sign in as the sale administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigators > Configuration > Application Composer**.
4. On the Overview page, go to **Productivity Applications Setup**, and then select **CX Cloud Microsoft 365**.
5. In the Application Features region, expand **Account**, and then expand **Detail**.
6. Select the Standard layout and create a copy.
7. Give a name to the layout you created.
8. In the Assigned Role section, search for and select the Sales Manager role.
9. Move the **Parent Account ID** field from the Available Fields section to the layout.
10. **Save** your changes.
11. Publish the sandbox, for your changes to take effect.

When you sign in to Microsoft 365 as a Sales Administrator, you can see the Parent Account ID, which users with other roles can't see.

#### *Related Topics*

## Create Advanced Criteria for a Layout

Advanced criteria enables you to define a set of conditions that the application must meet before displaying the page for a feature's Detail or Edit views.

For example, if you create an advanced criteria for an Opportunity Detail page layout as follows: **Status Equal to Open**, then your layout will only show open opportunities.



**Note:** You can't create advanced criteria for List, Picker, and Saved Searched layouts. Here are the steps to Create Advanced Criteria:

1. Sign in as the sales administrator or as a setup user.
2. Ensure that you're working in an active sandbox.
3. Go to **Navigator > Configuration > Application Composer**.
4. On the Overview page, select **Productivity Applications Setup**, and then select **CX Cloud Microsoft 365**.
5. In the Application Features section, expand the feature that contains the page payout that you want to add advanced criteria to.
6. Expand the relevant layout and create a new layout.
7. In the Advanced Criteria, click **Add**.
8. Create your criterion by selecting the field, operator, and then entering the condition or field value.
9. You can create multiple condition statements and join them using the **AND** or **OR** clauses.
10. **Save the layout**.
11. Publish the sandbox.

## Disable the Create, Edit, and Delete Actions on Objects

By default, users using the Oracle add-in can create, edit, and delete appointments, tasks, call reports, and contacts, based on their role privilege. There can be situations where you may want to disable these abilities for all the add-in users.

For example, if your business doesn't want anyone to delete call reports, you can disable the delete action on call reports so that your users can't delete them anymore. Similarly, if your business doesn't want users to update tasks once created, you can disable the Edit action on Tasks.

Here's how you can disable these actions:

1. From the sandbox of your sales application, open the CX Microsoft 365 Designer (Sales application > Application Composer > Productivity Applications Setup > CX Microsoft 365 Designer).
2. Decide the object you want to disable the actions on. For example, if you want to disable actions on call reports, select Call Report.
3. Under Feature details, turn on the suitable disable options:
  - **Disable Create Flow:** Turn this on, to disable the ability to create an object. For example, if you don't want users to create the call reports, turn this on.
  - **Disable Edit Flow:** Turn this on, to disable the ability to edit an object. For example, if you don't want users to edit or update the call reports, turn this on.

- **Disable Delete Flow:** Turn this on, to disable the ability to remove an object. For example, if you don't want users to remove the call reports, turn this on.
- 4. Save your changes to the object and publish.

## Enable Do Not Contact Fields for Custom Layouts

By default, the standard Contacts page shows three Do-Not-Contact fields: Do Not Call, Do Not Email, and Do Not Mail. Users of the Oracle add-in can set communication preference of their contacts using these fields.

However, for custom layouts, these fields aren't enabled by default.

Here are the steps to enable these fields on your custom layouts:

1. From the sandbox of your sales application, open the CX Microsoft 365 Designer (Sales application > Application Composer > Productivity Applications Setup > CX Microsoft 365 Designer).
2. From the menu (hamburger icon), open your custom layout for Contacts.
3. From the Available Fields, drag-and-drop the Do Not Call, Do Not Email, and Do Not Mail fields. You have one more field called 'Do Not Contact'. If users want to indicate that a contact doesn't want to be communicated by any mode, they can turn on just this one. To the custom layout, you can add this field as well.
4. Save your changes and publish.

## Add User-Defined Links

You can use the Open URL functionality to configure external links and add those links into objects.

Here's how to do it:

1. Ensure that you're working in an active sandbox.
2. Sign in as a sales administrator or a setup user.
3. Click **Navigator > Configuration > Application Composer**.
4. In the Common Setup menu, or on the Overview page, click **Productivity Applications Setup** and then click **CX Cloud Microsoft 365**.
5. Expand the feature where you want to add the link. For example, expand the **Accounts** feature.
6. Expand the **Detail** view.
7. Click the **Duplicate** icon to create a layout that you can configure.
8. Enter the name of the layout and click **OK**.
9. Go to the **Action and Links** region.
10. Drag and drop the **Open Custom URL** link from the **Available Links** section to the **Action and Links** section.
11. On the Custom URL Properties page, enter the link name and URL.
12. Click Save. The URL is now available in this region.
13. Activate the layout that you created by publishing the sandbox.

## Add a User-Defined Logo

You have the flexibility to change the appearance of the add-in home page banner by replacing the Oracle logo with a logo of your choice.

To add your logo:

1. Ensure that you're working in an active sandbox.
2. Sign in as a sales administrator or a setup user.
3. Click **Navigator** > **Configuration** > **Application Composer**.
4. In the Common Setup menu, click **Productivity Applications Setup** and then click **CX Cloud Microsoft 365**.
5. Expand **Side Panel** and go to the Header layout.
6. In the Logo region, click **Upload** to upload your logo.
7. Click **Save**.

Once you upload your logo, the application removes the default Oracle logo. But, you can get back to the default logo by deleting the user-defined logo.

## Configure a Saved Search for Microsoft 365

Create saved searches to use the same search condition multiple times, without having to explicitly define the search conditions.

Do this to configure a search operation:

- Set the search as your default search.
- Create a search criteria.

The fields that are available depend on the object that you have selected. For example, a typical search on the accounts object could be; **Record Set Equals I Own**. This condition fetches all accounts that you own.

**Note:** You can include fixed or multi-select drop-down list fields as well to your search criteria.

- Add fields on which you can create search conditions.
- Add roles to your configured search.

## FAQs for Extending Microsoft 365

### How can I create a trigger to allow or prevent a before-insert script, called only from Outlook?

You can allow or prevent a before-insert script through Groovy scripts using the `AutoLogSource` field. Here's an example script that shows how to modify the `AfterCreate` trigger:

```
if(AutoLogSource != 'OUTLOOK')
{
// Place your groovy code here. This won't be triggered through Outlook.
}
```

## How can I make a field read-only?

You can make a field read-only in the Edit page of a feature. Create an edit layout, select the appropriate field, and add Updatable Conditions in the Field Criteria region.

When the conditions are met, the field can be edited in the Microsoft 365 add-in. Otherwise, the field remains read-only.

## How can I make a field mandatory?

Certain fields, such as First Name, in the Contacts page, are required in the default setup of the Oracle add-in. You can set certain fields, such as Location, as required, when setting up the standard objects in Application Composer.

However, there can be scenarios where you want to make some fields in the add-in required, without affecting the default setup or the standard objects.

For example, in the Appointments page, you may want to make Appointment Type mandatory, which is otherwise an optional field in the default or standard setup. In such case, you can set it as mandatory from the Microsoft 365 designer.

Here's how you can do that:

1. Enter a sandbox and open Microsoft 365 Designer (Application Composer > Productivity Applications Setup > CX Cloud Microsoft 365).
2. Open the Edit layout of an object, such as Appointment.
3. Create a copy of the standard layout or modify any existing custom layout.
4. Within the layout, go to the field you want to change the mandatory options of.
5. Expand the Field Criteria section on the right-side pane and see the options under Required Conditions field. By default, it's set to Application Composer Default. This means that the field follows the standard object settings done in Application Composer.
6. Change the Required Conditions to 'Always Required' or 'Conditionally Required' as needed - Pick **Always Required** if you want the field to be mandatory always. Pick **Conditionally Required** to make a field as required, only when few conditions are met. For example, Appointment Type must be required only when a user selects an appointment as 'All Day'.
7. Save the layout.

## How can I add or remove fields?

Navigate to the CX Cloud Microsoft 365 designer in Application Composer, select the field that you want to add in the Available Fields region, and then click the field and move it to your preferred location in the page layout. Save the layout.

## How can I enable the field, 'Do not Contact', for the layouts duplicated from standard layout?

By default, the Do Not Contact field isn't enabled in the layouts created from the standard layout. You can add this field to the layout so that your users can see and use this in the side panel.

To add the field, go to the sandbox of your sales application. Open the CX Microsoft 365 Designer (Sales application > Application Composer > Productivity Applications Setup > CX Microsoft 365 Designer). From the menu (hamburger icon), open standard layout of your Contacts page. From the Available Fields, drag-and-drop **Do Not Contact**. Save your changes and publish.

## How can I add actions to a layout?

To add actions to your layout, navigate to the CX Cloud Microsoft 365 designer in Application Composer, select the feature, and go to the Detail layout. Create a copy of the standard layout and click page control to go to the Actions page.

## Can I remove the layouts I created in the Microsoft 365 Designer?

Yes. You can remove the layouts you don't want in the Microsoft 365 Designer. To remove an active layout, first deactivate the layout, and then click the Delete icon.

You can't deactivate or delete standard layouts and saved searches.

### *Related Topics*

- [Create a Specific Layout](#)

## How can I configure the features list on the Navigator?

Select the feature in the Navigator, and click Show On Navigator to show or hide the feature. You can also add features in the Navigator by moving them from the Available Features section to the Navigator.

You can remove only those features that you added and not those that are available by default.

## How You See Service Requests in the Microsoft 365 Side Panel

Managing service requests is integral part of the daily job of some salespeople.

Let's say a salesperson gets an email from his contact that a service request isn't making progress. He may want to view the details of the service request immediately from the context of this email. After you enable the functionality, salespeople see service requests in the side panel as related records, and in the Accounts tab as a subtab.

Here are the steps to enable the Service Requests subtab for Accounts:

1. Activate a sandbox.
2. Go to the Application Composer.
3. Click **Productivity Applications Setup** in the Common Setup section, and then click **CX Cloud Microsoft 365**.

4. In the Microsoft 365 Designer, select **Related Records** in the side panel.
5. Create a layout.
6. In your layout, expand the **Available Items** section.
7. Drag and drop **Service Request** into your layout.
8. Next, add the Service Requests subtab in the Accounts tab.
9. Expand **Details** in Accounts, in the Application Features section.
10. Create a details layout.
11. Go to **Related Items** in your layout.
12. Expand the **Available Related Items** section.
13. Drag and drop **Service Requests** into your layout.
14. **Save** the layout.

**Note:** Only critical service requests appear under the Service Requests subtab of accounts.

# 47 Extend Opportunities and Related Objects

## Overview of Extending Sales and Opportunity Management Objects

Read this section to learn how to extend sales and opportunity management objects and pages.

You learn about how to:

- Extend each opportunity management object using Application Composer
- Modify opportunity management objects using Page Composer

## Extend Pages for Opportunities

Using Application Composer, you can change many items that appear in the pages for opportunities.

Use Application Composer to configure these pages:

- Opportunities landing page
- Create Opportunity page
- Edit Opportunity page
- Products table in the Edit Opportunity page
- These subtabs within the Edit Opportunity page:
  - Activities
  - Contacts
  - Deal Registrations
  - Leads
  - Notes
  - Partners
  - Team

For example, you can:

- Hide or show standard fields.
- Hide or show standard actions and buttons.
- Add user-defined fields of all types.
- Set fields as required.
- Set field default values.
- Reorder columns.

- Change column labels.
- Add user-defined actions and buttons.

## High-Level Steps to Modify Opportunity Pages

Here are the high-level steps to make changes to the opportunity UI pages:

1. Activate a sandbox.
2. Navigate to the Application Composer.
3. Expand the **Opportunity** object tree.
4. In the Opportunity tree, click the **Pages** link.
5. Ensure that the **Application Pages** tab is active.
6. In the region that corresponds to the page you're modifying, duplicate the standard layout and edit the resulting layout. For example, in the Details Page Layout region, duplicate the standard layout and then edit the resulting layout. See the Configure Opportunity Pages section in this topic for details about which regions in the Application Pages tab correspond to which opportunity pages.
7. In the new user-defined layout row, the Active check box will be automatically checked, indicating that the new user-defined layout is active.

**Note:** Since you have duplicated the standard layout, two layouts now display. When the application finds more than one layout, it evaluates each layout at runtime, starting with the first layout in the table. If all conditions are met for the layout, then it's displayed. If not, then the next layout is evaluated, and so on.
8. Save your changes.
9. Publish the sandbox.

## Configure Opportunity Pages

This table shows the opportunity pages or subtabs that can be modified, along with the navigation steps to the areas where you make the modifications.

All of these navigation steps assume the use of the Application Pages tab.

| Opportunity Page                      | Navigation                                                                                                                                                                                                                                                                                                                              |
|---------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Landing (list) page                   | <ol style="list-style-type: none"><li>1. Expand the <b>Opportunity</b> object.</li><li>2. Click the <b>Pages</b> link.</li><li>3. In the Landing Page Layouts region, duplicate the standard layout and edit the resulting layout.</li></ol>                                                                                            |
| Create Opportunity Page               | <ol style="list-style-type: none"><li>1. Expand the <b>Opportunity</b> object.</li><li>2. Click the <b>Pages</b> link.</li><li>3. In the Creation Page Layouts region, duplicate the standard layout and edit the resulting layout.</li></ol>                                                                                           |
| Edit Opportunity Page, Summary region | <ol style="list-style-type: none"><li>1. Expand the <b>Opportunity</b> object.</li><li>2. Click the <b>Pages</b> link.</li><li>3. In the Details Page Layouts region, duplicate the standard layout and edit the resulting layout.</li><li>4. Ensure the <b>Summary</b> subtab is active.</li><li>5. Edit the Summary region.</li></ol> |
| Edit Opportunity Page, Products table | <p>Optionally, first add user-defined fields to the Opportunity Revenue object.</p> <ol style="list-style-type: none"><li>1. Expand the <b>Opportunity</b> object.</li><li>2. Click the <b>Pages</b> link.</li><li>3. In the Details Page Layouts region, duplicate the standard layout and edit the resulting layout.</li></ol>        |



| Opportunity Page                                     | Navigation                                                                                                                                                                                                                                                                                                                                                                                                                                |
|------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                                      | <ol style="list-style-type: none"> <li>4. Edit the Edit Revenue Table region.</li> </ol>                                                                                                                                                                                                                                                                                                                                                  |
| Edit Opportunity Page, Contacts subtab               | <p>Optionally, first add user-defined fields to the Opportunity Contact object.</p> <ol style="list-style-type: none"> <li>1. Expand the <b>Opportunity</b> object.</li> <li>2. Click the <b>Pages</b> link.</li> <li>3. In the Details Page Layouts region, duplicate the standard layout and edit the resulting layout.</li> <li>4. Click the <b>Contacts</b> subtab.</li> <li>5. Edit the Contacts subtab.</li> </ol>                  |
| Edit Opportunity Page, Team subtab, Team view        | <p>Optionally, first add user-defined fields to the Opportunity Team Member object.</p> <ol style="list-style-type: none"> <li>1. Expand the <b>Opportunity</b> object.</li> <li>2. Click the <b>Pages</b> link.</li> <li>3. In the Details Page Layouts region, duplicate the standard layout and edit the resulting layout.</li> <li>4. Click the <b>Team</b> subtab.</li> <li>5. Edit the Fuse Opportunity Team region.</li> </ol>     |
| Edit Opportunity Page, Team subtab, Territories view | <p>Optionally, first add user-defined fields to the Sales Territory object.</p> <ol style="list-style-type: none"> <li>1. Expand the <b>Opportunity</b> object.</li> <li>2. Click the <b>Pages</b> link.</li> <li>3. In the Details Page Layouts region, duplicate the standard layout and edit the resulting layout.</li> <li>4. Click the <b>Team</b> subtab.</li> <li>5. Edit the Territories region.</li> </ol>                       |
| Edit Opportunity Page, Partners subtab               | <p>Optionally, first add user-defined fields to the Opportunity Partner object.</p> <ol style="list-style-type: none"> <li>1. Expand the <b>Opportunity</b> object.</li> <li>2. Click the <b>Pages</b> link.</li> <li>3. In the Details Page Layouts region, duplicate the standard layout and edit the resulting layout.</li> <li>4. Click the <b>Partners</b> subtab.</li> <li>5. Edit the Partners subtab.</li> </ol>                  |
| Edit Opportunity Page, Deal Registrations subtab     | <p>Optionally, first add user-defined fields to the Opportunity Deal object.</p> <ol style="list-style-type: none"> <li>1. Expand the <b>Opportunity</b> object.</li> <li>2. Click the <b>Pages</b> link.</li> <li>3. In the Details Page Layouts region, duplicate the standard layout and edit the resulting layout.</li> <li>4. Click the <b>Deal Registrations</b> subtab.</li> <li>5. Edit the Deal Registrations subtab.</li> </ol> |
| Edit Opportunity Page, Activities subtab             | <p>You must use the Activity object in Application Composer to extend this subtab.</p> <ol style="list-style-type: none"> <li>1. Navigate to the <b>Activity</b> object.</li> <li>2. Click <b>Pages</b> and ensure the <b>Application Pages</b> tab is active.</li> <li>3. In the <b>Embedded Activity Summary Layout region</b> at the bottom of the page, duplicate the standard layout and edit the resulting layout.</li> </ol>       |
| Edit Opportunity Page, Notes subtab                  | <p>You must use the Notes object in Application Composer to extend this subtab.</p> <ol style="list-style-type: none"> <li>1. Navigate to the <b>Notes</b> object.</li> <li>2. Click <b>Pages</b> and ensure the <b>Application Pages</b> tab is active.</li> <li>3. Duplicate the standard layout and edit the resulting layout.</li> </ol> <p>The Notes list page isn't extensible.</p>                                                 |

| Opportunity Page                    | Navigation                                                                                                                                                                                                                                                                                                                                                                                                      |
|-------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Edit Opportunity Page, Leads subtab | <p>Optionally, first add user-defined fields to the Sales Lead object.</p> <ol style="list-style-type: none"><li>1. Expand the <b>Opportunity</b> object.</li><li>2. Click the <b>Pages</b> link.</li><li>3. In the Details Page Layouts region, duplicate the standard layout and edit the resulting layout.</li><li>4. Click the <b>Leads</b> subtab.</li><li>5. Edit the Fuse Lead Overview table.</li></ol> |

These Assessments subtab isn't configurable.

Related Topics

- [Overview of Application Pages](#)

# Example of Extending Pages for Opportunities Using Application Composer

This example demonstrates how you can modify pages for Opportunities using Application Composer.

## Extending Pages for Opportunities Using Application Composer

1. Navigate to the Application Composer Overview page.
2. In the object tree, select a standard object that includes a set of pages, such as Opportunity.
3. Select the Pages node.
4. Select the Application Pages tab.
5. Use the links on the tab to navigate to the object's configuration pages, where you can modify the pages that are available for the selected object. You can show or hide fields, rearrange fields, and add your own fields.
6. For example, if you want to add the field 'Budget Amount' to the Create Opportunity page, select a layout in the **Creation Page Layouts** region. Click the **Edit** icon or select **Actions > Edit Layout**
7. In the **Edit Application Page Creation** page, select the **Edit** icon in the **Opportunity Create** region
8. In the Configure Detail Form region of the Opportunity Create page, move the **Budget Amount** field from the Available Fields to the Selected Fields list.
9. Click Save and Close.

# Make Changes to Competitors Pages

Competitors pages are available from the Navigator by selecting the Competitors menu item. You can use Application Composer to change look of the these pages.

## Competitors Pages and Navigation

Here are the extensible pages and regions for the Sales Competitor object, along with the navigation to the configuration pages.

| Competitors Page          | Competitors Region      | Navigation                                                                                                                                                                                                    |
|---------------------------|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Competitors Overview page | Competitors list region | <ol style="list-style-type: none"><li>1. Select the Sales Competitor object.</li><li>2. Click the Pages link.</li><li>3. Click the Desktop Pages tab.</li><li>4. Click the Edit Summary Table link.</li></ol> |
| Create Competitor page    | Details region          | <ol style="list-style-type: none"><li>1. Select the Sales Competitor object.</li><li>2. Click the Pages link.</li><li>3. Click the Desktop Pages tab.</li><li>4. Click the Edit Creation Page link.</li></ol> |
| Edit Competitor page      | Details region          | <ol style="list-style-type: none"><li>1. Select the Sales Competitor object.</li><li>2. Click the Pages link.</li><li>3. Click the Desktop Pages tab.</li><li>4. Click the Edit Summary Form link.</li></ol>  |

For more details about adding fields, see the topics on adding fields using Application Composer.

## Create New Competitor Fields

If you want to put more fields on Competitors competitor pages, then you first create them. Here's an example of how to do that:

1. Navigate to **Configuration > Application Composer**.
2. In the Objects tree, under Standard Objects, expand the object tree for the object you're modifying. For example, expand the **Sales Competitor** tree.
3. Click the **Fields** node for the object.
4. Click the **Custom** tab.
5. Click the **Create** icon, or select **Create** from the Actions menu.
6. Select the type of field you're creating. For example, select **Text** as the type for a text entry field.
7. Click **OK**.
8. In the Appearance area, enter a **Display Label** for the new field. Set other optional attributes as desired.
9. In the Name area, enter an internal name for the field. The application prepopulates one based on your entry in the Display Label field, but you can override the default value. Ensure there's no space in an internal name.
10. Optionally, in the Constraints area, enter additional parameters for the field. For example, make the field a required field.
11. Optionally, in the Default Value region, enter a default value for the field.
12. Click **Save and Close**.

## Modify Competitors Pages

Now that you have added your fields, here's how add them to the Competitors pages or regions.

1. Navigate to **Configuration > Application Composer**.
2. In the Objects tree, under Standard Objects, expand the **Sales Competitor** object tree.

3. Click the **Pages** node for the Sales Competitor object.
4. All competitor pages are located under the Desktop Pages tab. Click the **Desktop Pages** tab.
5. Click the page you want to change and make the changes. See the Competitors Pages and Navigation section above for more information on which pages are extensible.
6. Save your changes.

## Duplicate Display Names for Fields

When you configure Competitors pages, in the Available Fields list, some field display names appear to be duplicates. For example, you may see two fields for Primary Competitor. The names you see in the list are display names only; each has an underlying name, which is its actual name. To see the underlying name of the field, hover your mouse pointer over the field name. The hover text displays the actual name of the field.

### Related Topics

- [About Application Composer](#)
- [Overview of Sandboxes](#)

## Example of Modifying Your Object to Validate Assessments

Use this example to learn how to modify your account, lead, contact, or opportunity to validate that a specified assessment template is completed, using Groovy scripts in Application Composer.

In this example, you're a sales administrator and you want to ensure that sales representatives complete the assessment template Discount Eligibility before they set an opportunity to Won.

## Validating Assessment Using Scripting

To ensure that sales representatives always fill in the Discount Eligibility Assessment template before closing an opportunity:

1. Sign in as a sales administrator.
2. Create and activate a sandbox.
3. Navigate to Application Composer.
4. From the **Applications** list, select **Sales**.
5. Expand **Standard Objects**, and then expand **Opportunity**.
6. Click **Server Scripts**.
7. On the Server Scripts Opportunity page, select **Triggers**.
8. In the Object Triggers region, click the **Add a new Trigger** icon.
9. On the Create Object Trigger page, select **Before Update in Database** from the **Trigger** list.
10. Enter a trigger name.
11. Enter the following script in the Trigger Definition region.

```
def optyStatusCode = getAttribute('StatusCode')
if (optyStatusCode == 'WON') {

    def id = getAttribute('OptyId')
    def vo = newView('AssessmentVO')
```

```
def vc = vo.createViewCriteria()
def vcr = vc.createRow()
def vci = vcr.ensureCriteriaItem('AssessedObjectId')
vci.setOperator('=')
vci.setValue(id)
vc.add(vcr)
vo.appendViewCriteria(vc)
vo.executeQuery()
def completedMandatoryAsmnt = false;

if (vo.getEstimatedRowCount() > 0) {
  vo.reset()
  while (vo.hasNext()) {
    def row = vo.next()
    if (row != null) {
      def tempName = row.getAttribute('TemplateName')

      if (tempName == 'Discount Eligibility') {
        def status = row.getAttribute('StatusCode')
        println("Asmnt Status is " + status)
        if(status != 'COMPLETED') {
          throw new oracle.jbo.ValidationException('Please complete the Mandatory Discount Eligibility Assessment
          before changing status to WON')
        } else {
          completedMandatoryAsmnt = true;
          break;
        }
      }
    }
  }
  if (completedMandatoryAsmnt == false) {
    throw new oracle.jbo.ValidationException('Please create and complete Mandatory Discount Eligibility
    Assessment before changing status to WON')
  }
}
```

## 12. Click **Save and Close**.

The trigger script displays a message whenever a sales representative changes the opportunity status to Won. This message ensures that the sales representative fills in the Discount Eligibility assessment template before changing the status to Won.

# Hide and Reorder Opportunity Fields Using Page Composer

You can hide fields, make fields required, and change the order of fields in the edit opportunity page, for specific job roles. You use Page Composer to do the modifications.

## Prerequisites

Before you begin, consider the following setup requirements or prerequisites:

- This procedure applies only to the desktop UI.
- You must have the job role of a setup user or Sales Administrator to do this task.

- You must know how to create and publish sandboxes following your organization's established processes. As a best practice, your organization might want you to first make changes in a sandbox before rolling the changes out to all users with the Sales Representative job role by publishing the sandbox.

## Starting Page Composer

First, start Page Composer's design mode to be able to make the changes:

1. Sign in to the application as a user with the Sales Administrator job role. Or, sign in as a setup user.
2. From the Navigator, select **Opportunities**.
3. Find an opportunity and edit it.
4. In the global region, expand the Settings and Actions menu which is available next to your user name. Then select **Edit Pages**, under the Administration subheading

The Edit Pages dialog appears.

5. In the Edit Pages dialog box, select the **Edit** option for the Job Role layer.
6. In the Value column next to Job Role, select **Sales Representative** from the list.
7. Click **OK**.

The page opens in Page Composer design mode.

8. Next, toggle Page Composer to Direct Selection mode: Click the **Select** icon in the global region.

Direct Selection mode is now invoked, allowing you to make field-level changes.

## Hiding a Field and Changing the Order of a Field

To hide the **Worst Case** field and change the order of the **Attachments** and **Partners** fields, use the following steps:

1. With Page Composer in Direct Selection mode, in the Additional Details region of the edit opportunity page, hover over the **Worst Case** field.

A colored box appears around the field and its label.

2. Click inside the box around the **Worst Case** field.

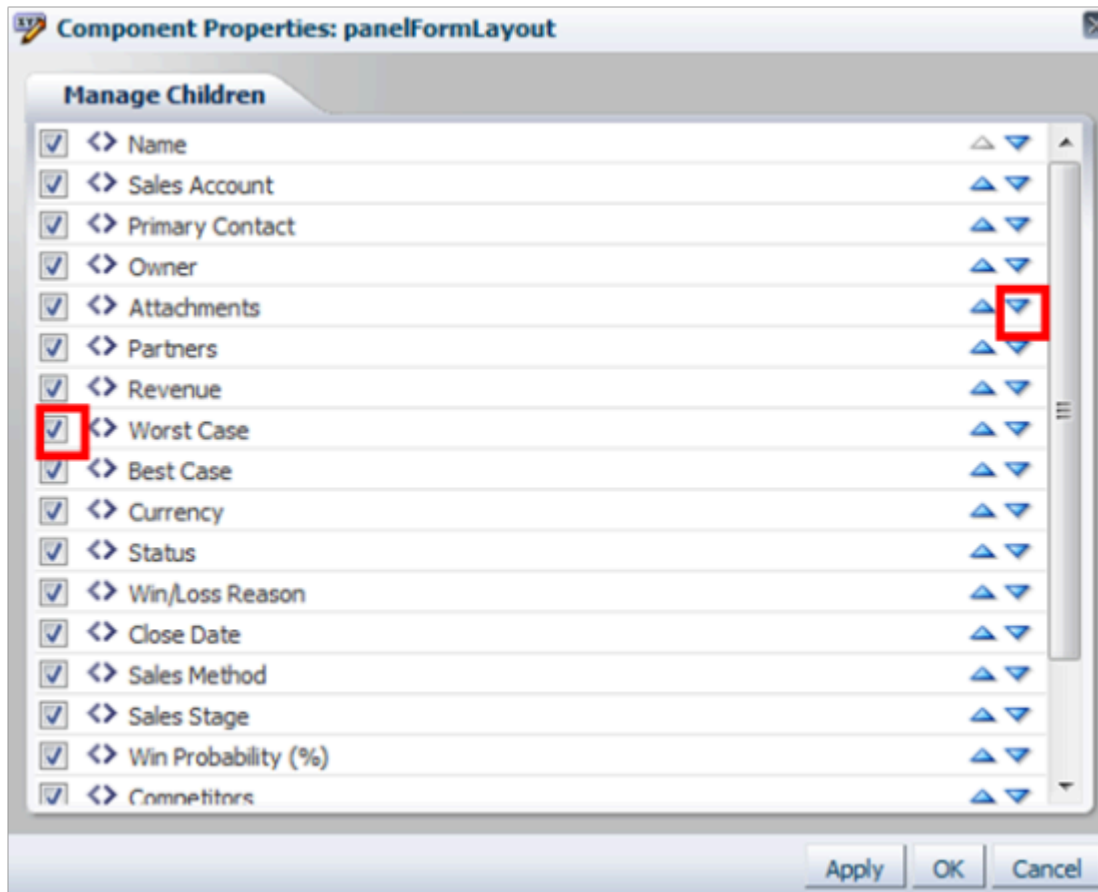
A dialog box opens with two options: **Edit Component** and **Edit Parent Component**.

3. Select the **Edit Parent Component** option.

The Component Properties: panelFormLayout window opens.

4. In the Component Properties: panelFormLayout window, clear the check box next to the **Worst Case** field.

The following figure shows the Component Properties dialog box with Worst Case selected.



5. Select the down arrow to the right of the **Attachments** field to move it below the **Partners** field.

The order of the two fields changes.

6. Click **OK**.

## Making a Field Read-Only

To make the **Win Probability** field read-only, use the following steps:

1. While still in Page Composer Direct Selection mode, hover over and then click the **Win Probability (%)** label.

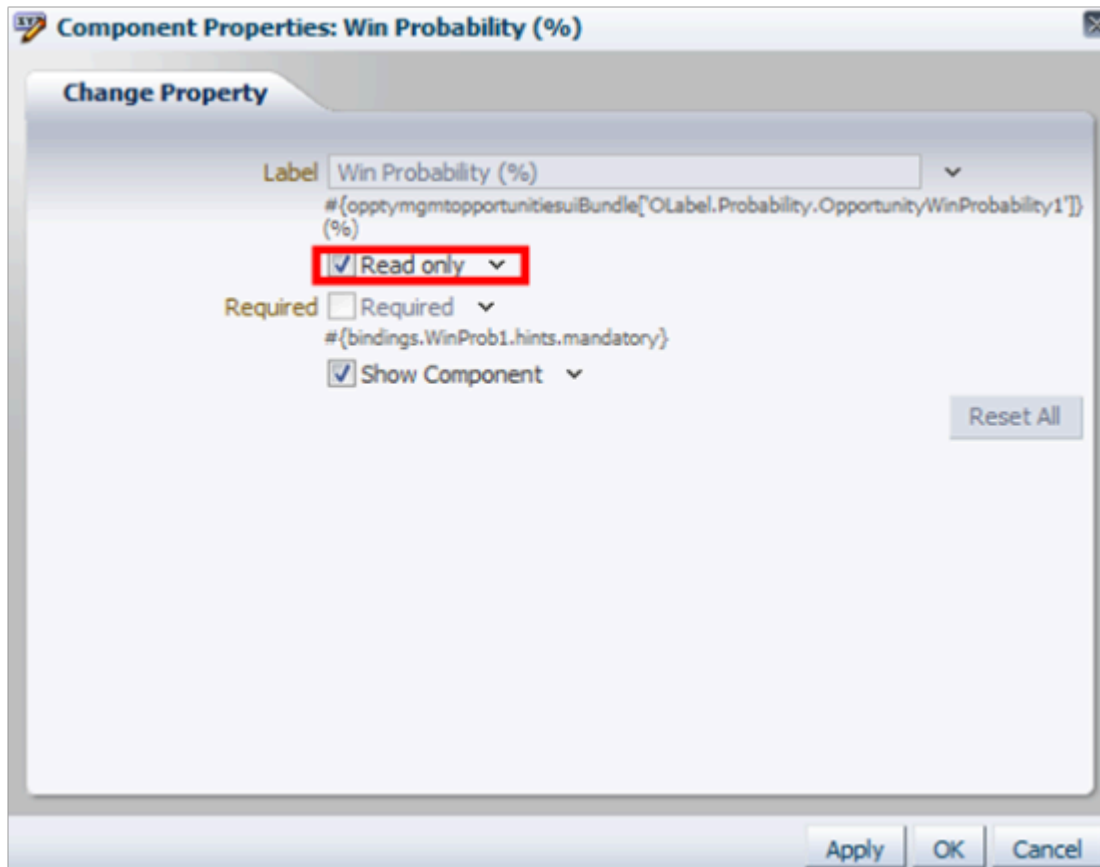
A dialog box opens with two options: **Edit Component** and **Edit Parent Component**.

2. Select the **Edit Component** option.

The Component Properties: Win Probability (%) window opens.

3. In the Component Properties: Win Probability (%) window, select the **Read only** check box.

The field becomes read-only, as shown in the following figure.



4. Click **OK**.

## Making a Field Required and Not Sortable

To make the Quantity column in the Revenue Items table required and not able to be sorted, use the following steps:

1. With Page Composer still in Direct Selection mode, in the Revenue Items region, hover over the **Quantity** column and click its header.

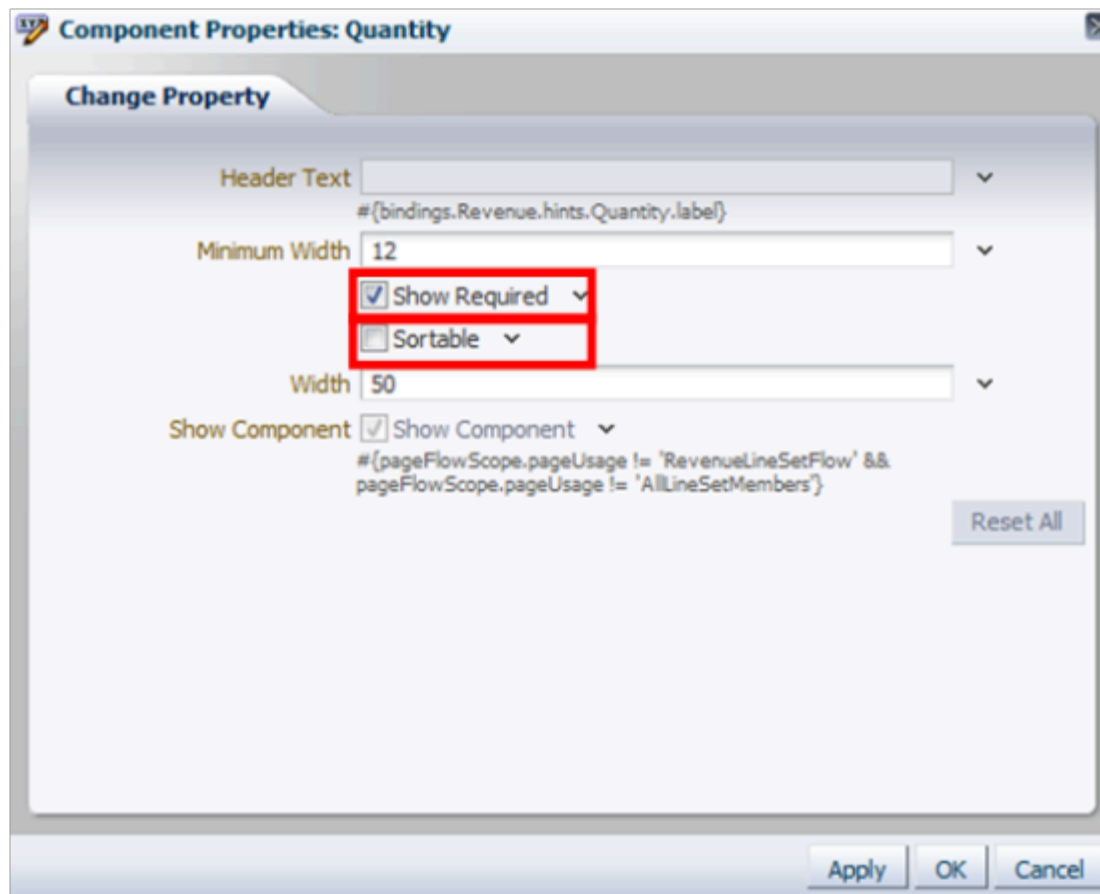
A dialog box opens two options: **Edit Component** and **Edit Parent Component**.

2. Select the **Edit Component** option.
3. Select the **Show Required** check box to make it a required field.



4. Clear the **Sortable** check box to make the column appear as not sortable.

The following figure shows the Change Property dialog box with the Show Required and Sortable check boxes.



5. Click **OK**.

## Saving Your Changes

When you're ready to commit your modification changes to the main line, perform these steps:

1. Click the **Close** button in the global region to sign out of Page Composer editor.
2. On the Sandboxes page, click the name of the sandbox you want to publish, and click **Publish**.

## Verifying Your Changes

Verify your modifications by using the following steps:

1. When you're done with your changes, click **Close** in the header to sign out of Page Composer.
2. Sign out of the application.
3. Sign as a user with the Sales Representative role.
4. Navigate to the opportunity record that you edited, and verify the following:
  - o The **Additional Details** region is expanded by default.
  - o The **Worst Case** field isn't visible.

- The **Win Probability (%)** field is read-only.
- The **Attachments** field is below the **Partners** field.
- The **Quantity** column is marked as required with an asterisk, and can't be sorted.

### Related Topics

## Configure Default Search on Standard Subtabs for Opportunities

You can add default search criteria to standard subtabs for opportunities so that your salespeople can more easily find the subtab data that's relevant to their daily activities.

When a user opens the subtab at runtime, the records displayed are automatically filtered using the search criteria you added. Users can change the default search value, but they can't change the default search field. They can, however, further refine their search by adding additional search fields and values at runtime.

Adding a default search filter to a subtab is optional. If you skip this step, then no search fields are automatically added to the subtab, but users can still see the search region and perform their desired search.

Use this procedure to add a default search filter field, operator, and value for the Leads subtab search on the Edit Opportunity page.

**Note:** You can select only one default search filter for each subtab. When adding a default search filter to standard subtabs, the search filter applies to all existing details page layouts with this subtab. Let's say you add a search filter to the Lead subtab on an Opportunity details page layout. This means that the same search filter is added to the Lead subtab on an Account details page layout.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**.
4. In the navigation tree, expand **Standard Objects**, expand **Opportunity**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.
8. In the **Subtabs Region**, highlight **Leads** and click the pencil icon.
9. From the **Configure Detail Form** page region, go to the **Configure Summary Table: Search Region**.
10. Select the default search filter you want to apply to the Leads subtab.

You can select from a list of both standard and custom Lead fields. Note that you can't pick dynamic choice list fields, set ID-based fixed choice list fields, and any fields that aren't searchable. Also, if this subtab was added based on a many-to-many (M:M) relationship, then you can select from only those intersection object fields that are already displayed on the subtab.

For example, you want to create a search filter to search for all qualified leads for an opportunity. Select **Status** from the drop-down list and select **Equals** as the operator and then select the Qualified check box.

11. Click **Done** and ensure that the layout status for your Leads subtab layout is set to Active.
12. Test the changes: Navigate to **Sales > Opportunities** as a user with access to the opportunity pages, for example, as a salesperson. Edit an opportunity and confirm that the data that displays on the Leads subtab includes only qualified leads.
13. Publish the sandbox.

#### Related Topics

- [Overview of Subtabs](#)

## Extend Search Region and Results for Opportunities

You can extend the search and select dialog layout for opportunities in your Sales application. Use Application Composer to modify and set custom values that suit your requirements for the search parameters in the opportunity extensible reusable region.

By extending the search and select dialog layout for your opportunities, you can tailor your search to suit your own business requirements.

Use this procedure to extend the search region and results for your opportunities search.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Opportunity**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. Under the Reusable Regions section, duplicate the Search and Select Dialog Layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.

The Edit Search and Select Layout page appears.

8. Next to the **Search Region**, click the pencil icon.
9. Under the **Configure Search Region**, select the fields to appear in the search region and move them from the Available Fields area to the Selected Fields area.
10. Click **Save and Close** to return to the Edit Search and Select Dialog Layout page.
11. Next to the **Search Results**, click the pencil icon.
12. Under the **Configure Detail Form**, select the fields to appear in the search results and move them from the Available Fields area to the Selected Fields area.
13. Click **Save and Close**.
14. Click **Done** and ensure that the layout status for your Search and Select Dialog Layout is set to Active.
15. Test the changes: Navigate to **Sales > Opportunities** as a user with access to the opportunity pages. Perform a search for opportunities and confirm that the fields you selected appear in the search and results region for your search.
16. Publish the sandbox.

## How to Add Assessment Subtab to Opportunity UI

You can view assessments associated with your opportunities through the Edit Opportunity: Assessment subtab. The Assessment subtab is hidden by default but you can make it available to your users through Application Composer.

Here's how to add the Assessment subtab to the Edit Opportunity page.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Opportunity**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.

The Details Layout page appears.

8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.

The Configure Subtabs dialog box appears.

9. Move **Assessments** from the Available Subtabs to the Selected Subtabs window.
10. Click **OK**.
11. Click **Save and Close**.
12. Click **Done** and ensure that the layout status for your user-defined layout is Active.
13. Test the changes: Navigate to **Sales > Opportunities** as a user with access to the opportunity pages, for example, as a salesperson. Edit an opportunity and ensure you can see the Assessment subtab in the Edit Opportunity page.
14. Publish the sandbox.

For more information, see the Subtabs topic in the Configuring Applications Using Application Composer guide.

## How to Add the Interactions History Subtab to Opportunities

You can view interactions history associated with your opportunities through the **Edit Opportunity: Interactions History** subtab.

The Interactions History subtab is hidden by default but you can make it available to your users through Application Composer.

Here's how to add the Interactions History subtab to the Edit Opportunity page.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.

4. In the navigation tree, expand **Standard Objects**, expand **Opportunity**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.  
The Details Layout page appears.
8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.  
The Configure Subtabs dialog box appears.
9. Move **Interactions History** from the Available Subtabs to the Selected Subtabs window.
10. Click **OK**.
11. Click **Save and Close**.
12. Click **Done** and ensure that the layout status for your user-defined layout is Active.
13. Test the changes: Navigate to **Sales > Opportunities** as a user with access to the opportunity pages, for example, as a salesperson. Edit an opportunity and ensure you can see the Interactions History subtab in the Edit Opportunity page.
14. Publish the sandbox.

For more information, see the Subtabs topic in the Configuring Applications Using Application Composer guide.

## Create a Related Object Relationship Between Service Requests and Opportunities

A related object subtab lists records from one object that's related to another object. Using Application Composer, you can create one-to-many relationships between two objects within the same application.

A relationship must exist before you can expose the "many" objects on a subtab that's displayed on the "one" object's details page or tree. For example, your users might want to associate an opportunity with a list of service requests that have been logged for that opportunity. To create a one-to-many relationship, you specify a source object and target object. A reference relationship lets you add a subtab to the source object's details page, showing a list of all the target object records that are associated with a single source object record.

### Create a One-to-Many Relationship

To expose a list of service requests associated with a specific opportunity as a subtab on the opportunity's details page, you must first create a one-to-many relationship between both the service request and opportunity objects.

Here are the steps to create a relationship between a service request and an opportunity.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. Select **Relationships** in the Common Setup pane.
5. On the Relationships page, click the **Create** icon.
6. In the **Source Object** field, select Opportunity.
7. In the **Target Object** field, select Service Request.

8. Enter the relationship name, display name, and description.

Once you create a relationship, you can no longer edit the relationship name.

9. In the **Cardinality** field, select 1:M.
10. Click **Save and Close**.

## Add Related Object Subtab

You now want to add the target object Service Request as a subtab to the source object's Opportunity detail page.

Here are the steps to add the related object subtab to the opportunity.

1. In the navigation tree, expand **Standard Objects**, expand **Opportunity**, and click **Pages**.
2. Ensure that the **Application Pages** tab is selected.
3. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
4. Type a new layout name and click **Save and Edit**.

The Details Layout page appears.

5. On the Edit Layout page, select the plus icon in the subtabs region.
6. On the Create Subtab page, select the **Related object** option.
7. Click **Next**.
8. Specify the values for the fields as follows:

| Field Label       | Select or Enter      | Description                                                                                                                  |
|-------------------|----------------------|------------------------------------------------------------------------------------------------------------------------------|
| Data Object       | Service Request      | The object that this subtab is based on. This subtab displays a list of service requests that are related to an opportunity. |
| Display Label     | Service Request Name | Name of the subtab.                                                                                                          |
| Drill Down Column | Service Request Name | Your users can click this column to drill down to view more details about a service request record.                          |
| Display Icon      | As applicable        | This icon appears on the application page as the subtab icon.                                                                |
| Selected Fields   | As applicable        | The fields that you want to appear on the subtab.                                                                            |

9. Save the Service Request Name subtab.

You have created a subtab to display service requests on a subtab which appears on the Opportunity details page.

10. Click **Done** and ensure that the layout status for your user-defined layout is Active.

11. Test the changes: Navigate to **Sales > Opportunities** as a user with access to the opportunity pages, for example, as a salesperson. Edit an opportunity and ensure you can see the Service Request subtab in the Edit Opportunity page.
12. Publish the sandbox.

#### Related Topics

- [Related Object Subtabs](#)
- [Object Relationships](#)
- [One-to-Many Relationships](#)

## Enable the Subscriptions Subtab for Opportunities

The Subscriptions subtab in the Opportunity details page lists the subscriptions associated with your opportunities. The subscriptions come from the quote lines in Oracle CPQ and you can use this subtab to get a better understanding of the subscriptions tied to your renewal opportunities.

#### Note:

Before you extend your Opportunity UI to expose the Subscriptions subtab, you must be using both Oracle Configure, Price, and Quote (Oracle CPQ) and Oracle Subscription Service.

Here's how to expose the Subscriptions subtab in the Edit Opportunity page.

1. Activate a sandbox.
2. Navigate to **Application Composer**, in the Configuration category.
3. Select **Sales**.
4. In the navigation tree, expand **Standard Objects**, expand **Opportunity**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
7. Type a new layout name and click **Save and Edit**.

The Details Layout page appears.

8. In the Subtabs Region, click the **Hide, Show, or Reorder Subtabs** icon.

The Configure Subtabs dialog box appears.

9. Move Subscriptions from the Available Subtabs to the Selected Subtabs window.
10. Click **OK**.
11. From the Details Layout page, click **Done**.
12. Make sure that the layout status for your layout is set to Active.
13. Test the changes as follows:
  - Navigate to **Sales > Opportunity** as a user with access to the opportunity pages, for example, as a salesperson.
  - Edit an opportunity and ensure you can view the Subscriptions subtab in the Edit Opportunity page.
14. Publish the sandbox.





# 48 Use Copy Maps

## Set Up Your Mapping File When Copying Opportunities

You can use two predefined mapping templates for copying an opportunity. The Standard Copy Opportunity Mapping (MOO\_COPY\_OPTY\_MAPPING) is a noneditable template which performs a standard copy of one opportunity to another.

The Copy Opportunity Mapping is an editable template that you use as the default mapping file for copying an opportunity. When you copy opportunities, information such as sales stage, win probability, and status for the opportunity aren't copied to the new opportunity. You may want to include additional information about the opportunity but the necessary attributes aren't contained in the predefined **Standard Copy Opportunity Map**. To include the information you want, you can add attributes to a copy of the predefined mapping file, called **Copy Opportunity Map**.

**Note:** Territory information, such as resource team records aren't copied as the resources are allocated on an on demand basis. Resources that are added manually, as well as those added through opportunity assignment, are copied to the newly created opportunity.

Here's how to include additional custom attributes or child objects to the editable copy of the predefined Copy Opportunity Map:

1. Access Application Composer by selecting **Application Composer** from the **Navigator** menu.
2. Select **Sales** to filter the object search, and select **Copy Maps** within **Advanced Setup**.
3. Expand **Copy Opportunity** and select **Copy Opportunity Map**.  
The Edit Copy Map window appears, and you use it to add additional attributes to your copy map.
4. Select each line in the **Entity Mappings** section and add records to the **Attribute Mappings** section. For example, here's a lead to opportunity copy map example of the field descriptions in the Attribute Mappings section for each of the attributes you want to add:

| Field                  | Description                                                                                                                                                                                                                                                                                                              |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| To                     | Select the attribute to where the selected entity is copied. For example, <b>OpportunityVO_Id_c</b> .                                                                                                                                                                                                                    |
| Referenced View Object | <p>For this example, select <b>Opportunity</b> from the drop-down list as your referenced view object for the OpportunityVO_Id_c attribute.</p> <p>If this attribute is a foreign key, select the view object joined by this foreign key. The application generates new foreign keys that keep the reference intact.</p> |
| Primary Key            | If this attribute is a primary key, select this check box. Instead of copying the value in the From object, the application generates a unique value for this key field for each record in the To object.                                                                                                                |

| Field           | Description                                                                                                                                                                                                                                                                                                         |
|-----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| From            | Select the attribute from where the selected entity is copied. For example, <b>Mk1LeadVO_Id_c</b> .                                                                                                                                                                                                                 |
| From Expression | Optionally, you can enter a Groovy expression to change the value in this attribute. For example, you want to change the value of the From object to some new value in the attribute of the To object. You can also enter a constant to fill this attribute with a constant value in every record of the To object. |

5. Click **Save and Close**.

## Set the Copy Opportunity Mapping Profile Option

You can specify the mapping file name to use when copying an opportunity by setting the Copy Opportunity Mapping profile option. The predefined file is used to copy attributes and child objects when creating a copy of an existing opportunity.

Here's how to access and modify the Copy Opportunity Mapping profile option:

1. In the Setup and Maintenance work area, go to the following:
  - o Offering: Sales
  - o Functional Area: Opportunities
  - o Task: Manage Opportunity Profile Options
2. In the Manage Opportunity Profile Options page, enter Copy Opportunity Mapping in the **Profile Display Name** field.
3. Click **Search**.
4. In the Profile Values section, you can see the predefined mapping called **Copy Opportunity Map**.
5. Click **Save**.

**Note:** If you want to use the Standard Copy Opportunity Map, change the profile value to **Standard Copy Opportunity Map**.

### Related Topics

- [Create a Copy Map](#)
- [Update the Copy Map to Copy the Lead Contact Value](#)
- [How do I update existing setup data?](#)

## Create a Copy Map

Copy maps enable you to create objects by copying existing objects. For example, you can copy responses to create leads and opportunities, or you can copy deal registrations to create opportunities. A mapping file is also available to copy opportunities.

You use the copy maps feature to map child objects and attributes in the source object (From object) to objects and attributes in the object you're creating (To object).

Predefined mapping files are available as part of your sales application to enable you to:

- Map objects and attributes during the creation of an account when converting a lead to an opportunity.
- Automatically add the primary partner contact to the lead team when a partner contact is added to the lead.
- Create leads and opportunities from responses
- Copy opportunities and create opportunities from deal registrations

To create a copy map:

1. Sign in as a user with Application Composer access and verify that you have an active sandbox.
2. Access Application Composer by selecting **Application Composer** from the **Navigator** menu, under the **Configuration** category.
3. Select **Sales** to filter the object search, and under **Advanced Setup**, select **Copy Maps**.
4. Click **New**, and then enter a unique name for the copy map. You specify the unique name in a profile option after you have completed and saved your copy mapping file.  
The Edit Copy Map window appears and you use it to define the copy map.
5. In the **Application Module Mapping** section, enter general information about the mapping as outlined in this table:

| Field     | Description                                                                                                                                                                |
|-----------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Name      | Enter a name for the mapping file. The name is displayed in the Copy Maps window. You can use the name to locate and search for copy maps that you want to edit or delete. |
| Map Group | Select the required mapping group for the new copy map from the drop-down list.                                                                                            |
| To        | Select the application module that you're copying to. For example, if you're copying leads to opportunities, then select the application module that includes leads.       |
| From      | Select the application module that you're copying from. For example, if you're copying responses to leads, then select the application module that includes responses.     |

6. In the **Entity Mappings** section, add a record for each view object that you're copying by completing these fields:

| Field      | Description                                                                                                                                                        |
|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| To         | Select the new view object that you're copying to.                                                                                                                 |
| From       | Select the existing view object that you're copying from.                                                                                                          |
| Query Type | Select one of the three query types: Unique Identifier, Join, or All Records. If you select All Records, then don't enter any information in the remaining fields. |

| Field                                   | Description                                                                                                                                                                                                                                                                                                                                      |
|-----------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                         |                                                                                                                                                                                                                                                                                                                                                  |
| Query Attribute                         | If you selected either Unique Identifier or Join in the Query Type field, then select an attribute to use during runtime. The attribute is used to filter the records that are copied to the new object. For example, if you select LeadId, then during runtime, only the records matching the Lead ID passed to the copy map engine are copied. |
| Joined View Object and Joined Attribute | If you selected Join in the <b>Query Type</b> field, then use these two fields to specify: <ul style="list-style-type: none"><li>○ The view object to which this object is joined</li><li>○ The attribute used as the basis of the join</li></ul>                                                                                                |

7. Select each line in the **Entity Mappings** section, and add records to the **Attribute Mappings** section for each of the attributes by completing these fields:

| Field                  | Description                                                                                                                                                                                                                                                                                                         |
|------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| To                     | Select the attribute to which the selected entity is copied.                                                                                                                                                                                                                                                        |
| Referenced View Object | If this attribute is a foreign key, select the view object joined by this foreign key. The application generates new foreign keys that keep the reference intact.                                                                                                                                                   |
| Primary Key            | If this attribute is a primary key, select this check box. Instead of copying the value in the From object, the application generates a unique value for this key field in each record in the To object.                                                                                                            |
| From                   | Select the attribute from which the selected entity is copied.                                                                                                                                                                                                                                                      |
| From Expression        | Optionally, you can enter a Groovy expression to change the value in this attribute. For example, you want to change the value of the From object to some new value in the attribute of the To object. You can also enter a constant to fill this attribute with a constant value in every record of the To object. |

8. Click **Save and Close**.

9. Specify the mapping file name in one of these profile options:

- Use the **Direct Lead to Opportunity Mapping** profile option to specify the mapping file name created when a direct lead is converted to an opportunity.
- Use the **Copy Opportunity Mapping** profile option to specify the mapping file name to use when copying an opportunity. The file is used to copy attributes and child objects when creating a copy of an existing opportunity.
- Use the **Partner Lead to Opportunity Mapping** profile option to specify the mapping file name created when a partner lead is converted to an opportunity.
- Use the **Lead to Account Mapping** profile option to specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of an account when converting a lead to an opportunity.
- Use the **Lead to Contact Mapping** profile option to specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of a contact when converting a lead to an opportunity.

*Related Topics*

- [Example of Modifying the Lead to Opportunity Copy Map](#)

## Example of Modifying the Lead to Opportunity Copy Map

Copy maps are a declarative way to specify what fields are copied among objects. This worked example shows you how to modify an existing mapping file to create an opportunity from a lead.

The functionality for converting a lead to an opportunity uses the predefined Copy Lead To Opportunity Map copy map feature. Predefined mapping files are available to you as part of your sales application. You can use copy maps to:

- Map objects and attributes during the creation of an account and the creation of a contact when converting a lead to an opportunity.
- Create leads and opportunities from responses
- Copy opportunities and create opportunities from deal registrations

In this example, you want to:

- Modify the copy lead to opportunity map
- Add a field to an opportunity
- Verify your changes

## Modify the Copy Lead To Opportunity Map

To modify the Copy Lead to Opportunity Map:

1. Sign in as a user with Application Composer access and verify that you have an active sandbox.
2. Access Application Composer by selecting **Application Composer** from the **Navigator** menu, under the **Configuration** category.
3. Under **Advanced Setup**, select **Copy Maps**. The **Copy Maps** window appears.
4. Select the **Copy Lead To Opportunity Map**. The **Edit Copy Map** window appears.

5. In the **Entity Mappings** region, highlight the row that contains **From: Sales Lead** and **To: Opportunity**.
6. In the **Attribute Mappings** region, select the **Add** icon to add a new row.
7. From the **To:** drop-down list, select **Comments**.

This value represents the Comments field in opportunities that contains the value.

8. In the **From Expression** field, enter this Groovy expression:

```
return "Copy Map executed for Lead: "+nvl(LeadNumber,"");
```

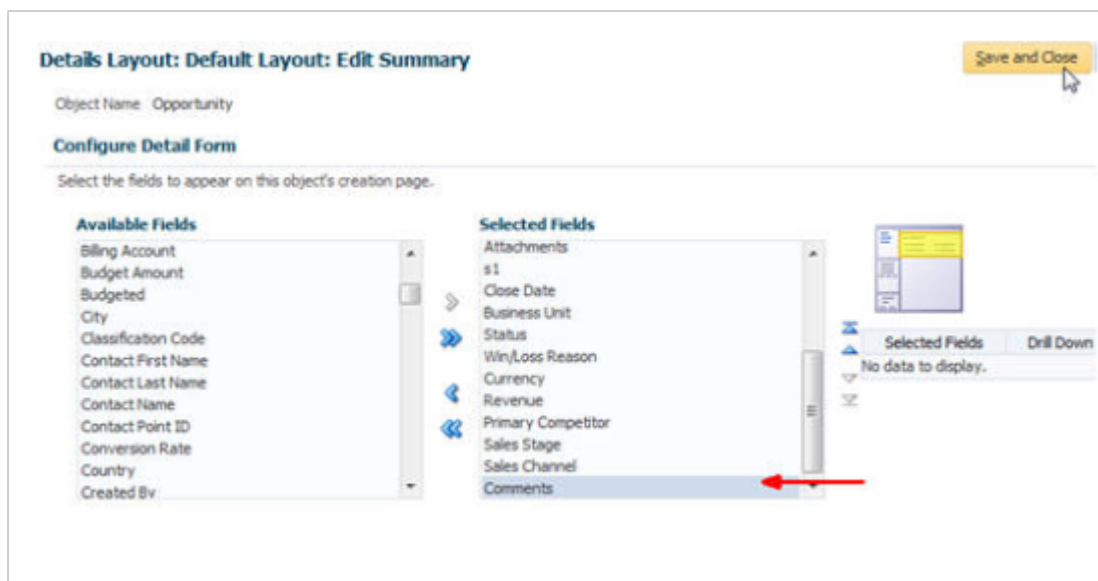
The expression uses text and the `LeadNumber` as the value to set into the opportunity **Comments** field.

9. Click **Save and Close**.

## Add a Field to an Opportunity

The Comments field isn't displayed by default on the Opportunities UI. Use **Application Composer** to add the Comments field to the opportunity header region as follows:

1. From **Application Composer**, expand and select **Objects, Standard Objects**, and then **Opportunity**.
2. Click **Pages** and then select the **Application Pages** tab.
3. On the Details Page Layouts section, edit any custom layout. If none exists, then duplicate the standard layout and edit the resulting custom layout.
4. Edit the **Summary** region.
5. Select the **Comments** field from the list in the **Available Fields** region and move it to the **Selected Fields** region.



6. Click **Save and Close**.
7. Verify that the Summary region list contains the Comments field.
8. Click **Done**.

## Verify Your Changes

1. Navigate to the Application Composer UI with the same user access and sandbox details used to complete the *Modify Lead to Opportunity Copy Map* task.

2. Navigate to Leads and click **Create Lead**.
3. Enter **Autumn Lead** as the **Name** and select **Pinnacle Technologies** as the **Account**. Accept all other defaults values for the remaining fields.
4. From the **Actions** drop-down list, select **Convert to Opportunity**.
5. Click the **Opportunities** icon.
6. Locate the newly created opportunity. It must have the same name as the lead that was originally created.

Examine the value in the **Comments** field. It contains the expected text, plus the lead number which originated this opportunity. Here's a screenshot that shows an example of the Edit Opportunity page with the Comments field populated with the lead number.

**Edit Opportunity: Autumn Lead: Summary**

Actions | Save | Save and Close

\* Name: Autumn Lead

Account: Pinnacle Technologies x

Primary Contact: [Empty]

Owner: Alan Hooper

Win Probability (%): 10

Include in Forecast: When matches forecast criteria

Attachments: None +

\* Close Date: 11/25/2014

Status: Open

Currency: USD

Amount: 0.00

Primary Competitor: [Empty]

Sales Stage: 01 - Qualification

Comments: ecuted for Lead: 56258

#### Related Topics

- [What's the lead-to-opportunity attribute mapping?](#)
- [Create a Copy Map](#)
- [Overview of Sandboxes](#)

## Update the Copy Map to Copy the Lead Contact Value

This topic describes how to update the copy map to copy over the Lead contact value into the opportunity's Customer field.

### Updating the Copy Map to Copy the Lead Contact Value

In this step, you update the copy map to copy over the Lead contact value into the opportunity Customer field. Copy maps are a declarative way to specify what fields are copied among objects. The functionality for converting a lead to an opportunity uses the predefined Copy Lead To Opportunity Map copy map feature.

1. Expand **Advanced Setup** and click **Copy Maps** (in left pane of the Application Composer).
2. Click **Copy Lead to Opportunity Map**.
3. Under the **Attribute Mappings** section, in the row for TargetPartyId, select PrimaryContactId from the drop-down list in the From column.
4. Click **Save and Close**.

## What's the lead-to-opportunity attribute mapping?

The lead-to-opportunity attribute mapping is a predefined one-to-one mapping of the attributes between the lead and opportunity applications. When converting leads to opportunities, lead attributes, such as sales account, products, revenue amount, lead contacts, and other attributes, are mapped to the newly created opportunity.

You convert a lead to an opportunity when the lead is qualified and is ready for further processing along the sales cycle. The following sections outline:

- General lead attributes mapped to opportunities
- Partner lead-specific attributes mapped to opportunities
- Lead contact attributes mapped to opportunity contact attributes
- Lead product attributes mapped to opportunity revenue line attributes
- Profile options that specify the mapping file name for user-defined mapping files

### General Lead Attributes Mapped to Opportunities

This table lists the general lead attributes that are mapped to the corresponding opportunity attributes:

| General Lead Attribute                                                                                                      | Opportunity Attribute |
|-----------------------------------------------------------------------------------------------------------------------------|-----------------------|
| Budget Amount                                                                                                               | Budget Amount         |
| Budget Status                                                                                                               | Budget check box      |
| Customer                                                                                                                    | Target Party          |
| Currency                                                                                                                    | Currency              |
| Description                                                                                                                 | Description           |
| Estimated Close Date                                                                                                        | Estimated Close Date  |
| Expiration Date                                                                                                             | Expiration Date       |
| Lead Number                                                                                                                 | Lead Number           |
| Name<br><br>This attribute value is the Lead Name and the current date and time, which generates a unique opportunity name. | Name                  |
| Owner                                                                                                                       | Owner of opportunity  |



| General Lead Attribute                                                                                                                 | Opportunity Attribute |
|----------------------------------------------------------------------------------------------------------------------------------------|-----------------------|
| Indicates the user who starts the conversion.                                                                                          |                       |
| Primary Contact                                                                                                                        | Key Contact           |
| Source Code<br><br>If a campaign or any other source creates a lead in which source code is used, then this attribute value is mapped. | Source                |

## Partner Lead Attributes Mapped to Opportunities

This table lists the partner lead attributes that are mapped to the corresponding opportunity attributes:

| Partner Lead Attribute                                                                                 | Opportunity Attribute |
|--------------------------------------------------------------------------------------------------------|-----------------------|
| Deal Approved By<br><br>For direct leads, this attribute is set to the user who starts the conversion. | Owner of opportunity  |
| Deal Approved By Resource Organization                                                                 | Resource Organization |
| Partner                                                                                                | Partner               |
| Partner Type                                                                                           | Partner Type          |
| Partner Program                                                                                        | Partner Program       |
| Registration Type                                                                                      | Registration Type     |
| Registration Number                                                                                    | Registration Number   |

## Lead Contact Attributes Mapped to Opportunity Contact Attributes

To map lead contact attributes to opportunity contact attributes, the following relationships must apply between the contact and the customer:

- The relationship end date is later than the current date.
- The relationship start date is earlier than the current date.
- The relationship status is active.

This table lists the lead contacts attributes that are mapped to the corresponding opportunity contacts attributes:

| Lead Contact Attribute | Opportunity Contact Attribute |
|------------------------|-------------------------------|
| Contact                | Contact                       |
| Contact Role           | Contact Role                  |
| Primary                | Primary                       |

## Lead Product Attributes Mapped to Opportunity Revenue Line Attributes

This table lists the lead product attributes that are mapped to the corresponding opportunity revenue line attributes:

| Lead Product Attribute | Opportunity Revenue Line Attribute |
|------------------------|------------------------------------|
| Amount                 | Revenue Amount                     |
| Approver               | Resource Party                     |
| Currency               | Currency for the Revenue Amount    |
| Inventory Item         | Inventory Item                     |
| Organization           | Inventory Organization             |
| Product Group          | Product Group                      |
| Quantity               | Quantity                           |
| Unit of Measure        | Unit of Measure                    |
| Unit Price             | Unit Price                         |

## Profile Options for Mapping File Names

As an administrator, you can specify your own mapping file name to use for mapping objects and attributes during the lead-to-opportunity conversion process. For example, you can create user-defined lead attributes in **Application Composer**, **Copy Maps**, and can then add these attributes to the existing ready-to-use mapping files. You must save the user-defined mapping file using a unique file name and then specify the saved mapping file name in one of these profile options:

- Use the **Direct Lead to Opportunity Mapping** profile option to specify the mapping file name created when a direct lead is converted to an opportunity.

- Use the **Partner Lead to Opportunity Mapping** profile option to specify the mapping file name created when a partner lead is converted to an opportunity.

## Link Campaigns Using the Lead to Opportunity Copy Map

If a lead is linked to a marketing campaign through a campaign response, then the association to the campaign must be maintained in your lead to opportunity conversion process.

This allows the opportunities to be linked with campaigns, and the respective opportunity revenue to be attributed to its linked campaign.

Modify the predefined copy map template, Copy Lead to Opportunity Map, to add a campaign entity mapping and campaign attributes. For information about how to modify a copy map, see the Example of Modifying the Lead to Opportunity Copy Map topic.

1. Add an entity mapping between OpportunityCampaignVO and Campaign Member with LeadId as the unique identifier.
2. Add the following attribute mappings as shown in the screenshot.
  - CampaignId
  - OptyCampaignId
  - OptyId
  - RevenuePercentage

| OpportunityCampaignVO             | Campaign Member        | Unique Identifier | LeadId            |
|-----------------------------------|------------------------|-------------------|-------------------|
| Opportunity > Opportunity Contact | Sales Lead Contacts    | Unique Identifier | LeadId            |
| Opportunity Lead                  | Sales Lead(MkLead1)    | Unique Identifier | LeadId            |
| Opportunity Source                | Sales Lead(MkLead1)    | Unique Identifier | LeadId            |
| Opportunity > Opportunity Revenue | Sales Lead Products    | Unique Identifier | LeadId            |
| Attribute Mappings                |                        |                   |                   |
| Actions ▾ View ▾ + × ↺            |                        |                   |                   |
| To                                | Referenced View Object | Primary Key       | From Expression   |
| CampaignId                        |                        | —                 | CampaignId        |
| OptyCampaignId                    |                        | ✓                 | CampaignMemberId  |
| OptyId                            | Opportunity            | —                 | LeadId            |
| RevenuePercentage                 |                        | —                 | RevenuePercentage |

## Modify Lead Convert and Mass Lead Convert Pages

Use the Lead Convert and Mass Lead Convert layout pages in Application Composer if you want to expose user-defined and standard fields in your lead to opportunity conversion process.

You must then configure the predefined copy map template, Copy Lead to Opportunity Map, to map the fields. Use the Manage Sales Lead Administrator Profile Values task to ensure that the configured copy map to be your default copy map which maps lead attributes to opportunity attributes during lead conversion.

## Modify the Lead Convert Pages

You duplicate the standard lead convert and mass lead convert page layouts and modify the default layouts. Edit the default page layouts to expose standard and user-defined fields so that their values can be copied to opportunity during lead conversion.

**Note:** These predefined standard fields exist for both the Mass Lead Convert Layouts and Lead Convert Layouts:

- Opportunity Name
- Owner
- Primary Contact
- Account

Here are the steps to modify the lead convert pages:

1. Sign in as a user with Application Composer access and verify that you have an active sandbox.
2. Access Application Composer by selecting **Application Composer** from the **Navigator** menu, under the **Configuration** category.
3. From **Application Composer**, expand and select **Objects, Standard Objects**, and then **Sales Leads**.
4. Click **Pages** and then select the **Application Pages** tab.
5. On the Mass Lead Convert Layouts and Lead Convert Layouts sections, edit any user-defined layout. If no user-defined layouts exist, then duplicate the standard layouts and edit the resulting user-defined layouts, as required.
6. Click **Save and Close**.
7. Verify your user-defined field changes and click **Done**.
8. Edit the copy map to map the user-defined fields between the lead and opportunity.

See the topic [Example of Modifying the Lead to Opportunity Copy Map](#) for more information.

9. Set the modified copy map as your default copy map.

See the topic [Enable a User-Defined Copy Lead To Opportunity Map Value](#) in the [Implementing Sales](#) guide.

### Related Topics

- [Enable a User-Defined Copy Lead To Opportunity Map Value](#)
- [Example of Modifying the Lead to Opportunity Copy Map](#)
- [Overview of Sandboxes](#)

# Enable a User-Defined Copy Lead To Opportunity Map Value

The Copy Maps feature lets you create objects by copying existing objects. After you specify the lead-to-opportunity copy map template in a profile option, you can copy notes, attachments, and activities from a lead record to an opportunity record during the lead-to-opportunity conversion.

These sections describe how to access the Direct Lead to Opportunity Mapping profile option and how you can specify your own user-defined mapping files.

## Set Your Copy Lead To Opportunity Map Value

You can specify the mapping file name to use when copying an opportunity by setting the Direct Lead to Opportunity Mapping profile option. Use the predefined file to specify the mapping file name created when you convert your lead to an opportunity.

Here's how to access and modify the value set for the mapping file name in the Direct Lead to Opportunity Mapping profile option:

1. In the Setup and Maintenance work area, go to:
  - o Offering: Sales
  - o Functional Area: Leads
  - o Task: Manage Sales Lead Administrator Profile Values
2. On the Manage Sales Lead Administrator Profile Values page, enter Direct Lead to Opportunity Mapping in the **Profile Display Name** field.

**Note:** For partner leads, use the Partner Lead to Opportunity Mapping profile option.

3. Click **Search**.
4. In the Profile Values section, the predefined mapping, called **Copy Lead To Opportunity Map**, appears in the **Profile Value** field.
5. Remove the **Copy Lead To Opportunity Map** value and enter the value for your user-defined mapping file, for example **My Copy Lead To Opportunity Map**.

**Note:** Use the Standard Reference Copy Lead To Opportunity Map to keep any attachment reference during the lead to opportunity conversion.

6. Click **Save and Close**.

See the topic [Modify Lead Convert and Mass Lead Convert Pages](#) for more information.

## Profile Options for Copy Maps

As an administrator, you can specify your own copy maps to use for mapping objects and attributes during the lead to opportunity conversion process. For example, you can create user-defined lead and opportunity attributes in Application Composer and can then add these attributes to the copy maps. Oracle recommends that you duplicate an

existing copy map and make the changes in the copy. You must save the user-defined copy map using a unique name and then specify the name of the saved copy map in one of these profile options:

| Profile Option Display Name         | Description                                                                                                                                                                                                                                |
|-------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Direct Lead to Opportunity Mapping  | Specify the mapping file name created in <b>Application Composer &gt; Copy Maps</b> . This file is used to map objects and attributes when a direct lead is converted to an opportunity. The predefined value is Copy Lead to Opportunity. |
| Lead to Account Mapping             | Specify the mapping file name created in <b>Application Composer, Copy Maps</b> . This file is used to map objects and attributes during the creation of an account when converting a lead to an opportunity.                              |
| Lead to Contact Mapping             | Specify the mapping file name created in <b>Application Composer, Copy Maps</b> . This file is used to map objects and attributes during the creation of a contact when converting a lead to an opportunity.                               |
| Partner Lead to Opportunity Mapping | Specify the mapping file name created in <b>Application Composer, Copy Maps</b> . This file is used to map objects and attributes when a partner Lead is converted to an Opportunity. The predefined value is Copy Lead to Opportunity.    |

See the topic [Example of Modifying the Lead to Opportunity Copy Map](#) for more information.

#### Related Topics

- [Modify Lead Convert and Mass Lead Convert Pages](#)
- [Copy a Lead to Account and Contact Maps](#)
- [How do I update existing setup data?](#)

## Copy a Lead to Account and Contact Maps

Copy maps enable you to create objects by copying existing objects. For example, you can use predefined mapping files to copy lead attributes stored on a lead to the account or contact created during lead conversion.

You use the copy maps feature to map child objects and attributes in the source object (From object) to objects and attributes in the object you're creating (To object).

### Copy a Lead to Account Map

Here's how to copy a lead to an account map:

1. Ensure that you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.
3. Select **Sales** to filter the object search, and under **Advanced Setup**, select **Copy Maps**.
4. On the Copy Maps page, select the **Copy Lead to Account > Standard Copy Lead to Account Map**.
5. Create a copy of the map and enter relevant account mappings on the Edit Copy Map page.
6. Click **Save and Close**.

7. Specify the mapping file name in the following profile option:
  - Use the **Lead to Account Mapping** (MKL\_LEAD\_TO\_ACCOUNT\_MAPPING\_NAME) profile option to specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of an account when converting a lead to an opportunity.

## Copy a Lead to Contact Map

Here's how to copy a lead to a contact map:

1. Ensure that you're working in an active sandbox.
2. Click **Navigator > Configuration > Application Composer**.
3. Select **Sales** to filter the object search, and under **Advanced Setup**, select **Copy Maps**.
4. On the Copy Maps page, select the **Copy Lead to Contact > Standard Copy Lead to Contact Map**.
5. Create a copy of the map and enter relevant account mappings on the Edit Copy Map page.
6. Click **Save and Close**.
7. Specify the mapping file name in the following profile option:
  - Use the **Lead to Contact Mapping** (MKL\_LEAD\_TO\_CONTACT\_MAPPING\_NAME) profile option to specify the mapping file name created in Copy Maps. This file maps objects and attributes during the creation of a contact when converting a lead to an opportunity.

### Related Topics

- [Create a Copy Map](#)
- [Enable a User-Defined Copy Lead To Opportunity Map Value](#)
- [Example of Modifying the Lead to Opportunity Copy Map](#)





# 49 Extend Quotes and Sales Orders

## Extend Application Pages for Sales Orders

Using Application Composer, you can change many items that appear on the application set of pages for sales orders. The Sales Order object is available to support the integration with Oracle Configure, Price, and Quote (CPQ) Cloud.

This object stores quote summary information that's synced from Oracle CPQ Cloud.

**Note:** Do not extend the Sales Order object unless the integration with Oracle CPQ Cloud has already been set up. For more information, see "About Integrating with Quotes" in the Related Topics.

The Sales Order object displays as a subtab in the following areas:

- Quotes and Orders subtab for account records
- Quotes and Orders subtab for opportunity records

Use Application Composer to create custom attributes (custom fields) on the Sales Order object. The custom fields you create are available for display on the Quotes and Orders subtab for account and opportunity records, as well as for use with web services.

For example, you can:

- Hide or show standard fields.
- Reorder columns.
- Add custom fields (all types).

## Modify the Sales Order Object

After the integration with Oracle CPQ Cloud has been set up, you can define custom fields for the Sales Order object.

To define custom fields:

1. Navigate to Application Composer.
2. Expand the Sales Order object.
3. Click the Fields node.

## Configure the Quotes and Orders Subtab

Next, configure the Quotes and Orders subtab, available from both the Account or Opportunity details page. To configure the subtabs, you must navigate to the Account or Opportunity page layouts in Application Composer.

1. Navigate to the Account or Opportunity object in Application Composer.
2. Click the Pages node.
3. On the Application Pages tab, navigate to the Details Page Layouts section. Create a custom layout by duplicating the standard layout, or edit an existing custom layout.
4. On the Details Layout page, click the Quotes and Orders subtab. You can:
  - Click the pencil icon next to the subtab name to rename the subtab.

- Click the pencil icon next to the Opportunity Quotes or Customer Quotes heading to indicate which of the sales order attributes (standard or custom) are displayed at runtime.

## Access the Sales Order Object for Custom Scripting

After you configure the Sales Order object, you can also write Groovy scripts that access the new custom fields you created. For example, maybe you want to validate sales order data on an opportunity. However, when writing the script on the Opportunity object, custom fields from the Sales Order object aren't available directly in the expression builder. To access those custom fields, you must use the `newView()` function to build a runtime link to the Sales Order object. After `newView()` executes against the Sales Order object, only then can your script access and analyze Sales Order fields.

Here's an example of the `newView()` function that retrieves the related sales order record based on the opportunity number.

```
def myVO = newView('SalesOrderHeader')
def view_Criteria = newViewCriteria(myVO);
def view_criteria_row = view_Criteria.createRow();
def view_condition = view_criteria_row.ensureCriteriaItem('OpptyNumber');
view_condition.setOperator('=');
view_condition.setValue(OpptyNumber);
view_Criteria.insertRow(view_criteria_row);
myVO.appendViewCriteria(view_Criteria);
myVO.setMaxFetchSize(1);
myVO.executeQuery();

if(myVO.hasNext())
{
def rec= myVO.next()
def cust_field_from_order_value = rec.<custom_field_API_name>_c
}
```

This line, specifically, gets the value of a custom Sales Order attribute and assigns it to a variable.

```
def cust_field_from_order_value = rec.<custom_field_API_name>_c
```

You can now complete the rest of the Groovy script to implement a validation rule, for example.

# 50 Extend Partner Relationship Management

## Overview of Configuring Partner Pages

Read this chapter to learn how to use Page Composer to configure partner relationship management pages:

- Configure partner pages used by your employees
- Configure external-facing pages used by your partners

## Extend Application Pages for Partners

Using Application Composer, you can change many items that appear on the application set of pages for partners.

Use Application Composer to modify these pages:

- Partners landing page
- Create Partner page
- Edit Partner page (read the following discussion of subtabs)

For example, you can:

- Hide or show standard fields.
- Set fields as required.
- Set field default values.
- Reorder columns.
- Change column labels.
- Add custom fields (all types).

**Note:** To extend the application set of pages for partners, use the Partner object in Application Composer.

## Partners Landing Page

You can modify the Partners landing page, also referred to as the Partners list page. For example, you can hide standard partner fields or show custom partner fields. To modify the Partners landing page:

1. Navigate to the Partner object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, click **Edit Summary Table**.

## Create Partner Page

You can modify the Create Partner page. For example, you can hide standard partner fields, make a field required, add a default value, and show custom partner fields. To modify the Create Partner page:

1. Navigate to the Partner object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.

To enhance run time usability for your end users, optionally group custom fields into field groups.

## Edit Partner Page

The Edit Partner page consists of multiple subtabs that display along the left side of the page. You can modify most of these subtabs, including changing the order of the subtabs. You can also add custom subtabs to display records from child or related objects, for example.

**Note:** To add custom fields to certain subtabs available from the Edit Partner page, you must first navigate to those subtab target objects in Application Composer to create the fields using the Fields node. After creating the fields on the target object, you can then navigate back to the desired details page layout for the Partner object to add those fields to the right subtabs.

To modify the Edit Partner page:

1. Navigate to the Partner object in Application Composer.
2. Select the Pages node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout to edit. Or, edit another existing layout.
4. When making changes to the Edit Partner page, select the subtab you want to change first. The following subtabs are available from the Edit Partner page. Use the following subtabs to configure which standard and custom fields display at run time. You can also configure buttons and actions.

**Tip:** The changes you make to these subtabs are unique to the Edit Partner page. For example, the changes you make to the Opportunities subtab on the Edit Partner page aren't reflected on the Opportunities subtab on the Edit Contact page.

- Overview
- Profile  
In addition to selecting standard and custom fields on the profile subtab, you can configure page regions by adding field groups.
- Contacts  
Use the Contact object to create custom fields as needed.
- Partner Account Team  
Use the Partner Account Team object to create custom fields as needed.
- Opportunities  
Use the Opportunity object to create custom fields as needed.
- Enrollments

Use the Program Enrollments object to create custom fields as needed.

- Notes

The Notes subtab isn't extensible, although you can change the tab name.

- Activities

The Activities subtab isn't extensible, although you can change the tab name.



# 51 Extend Territory Management

## How can I configure and extend application pages for territories?

Using Application Composer, you can modify many items that appear on the application pages for sales territories.

Use Application Composer to modify these pages:

- Territories landing page
- Create Territories page
- Details page (see a discussion of subtabs in the Details page section)

Make changes such as these examples:

- Hide or show standard fields.
- Set fields as required.
- Set field default values.
- Reorder columns.
- Change column labels.
- Add custom fields (all types).

**Note:** To extend the application pages for territories, use the Sales Territory object in Application Composer.

### Territories Landing Page

You can modify the Territories landing page. For example, you can hide standard fields or show custom fields.

1. Navigate to the Sales Territory object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Landing Page Layouts, duplicate the standard layout to create a new layout.

### Create Territories Page

You can modify the Create Territories page. For example, you can hide standard fields, make a field required, add a default value, and show custom fields.

1. Navigate to the Sales Territory object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Creation Page Layouts, duplicate the standard layout to create a new layout.

To enhance run time usability for your end users, optionally group custom fields into field groups.

## Details Page

The Details page consists of multiple subtabs that display along the side of the page. You can modify most of these subtabs. You can also add subtabs to display records from child or related objects, for example.

To add custom fields to certain subtabs available from the Details page, you must first navigate to those subtab target objects in Application Composer to create the fields. After creating the fields on the target object, you can then navigate back to the desired details page layout for the Sales Territory object to add those fields to the specific subtabs.

1. Navigate to the Sales Territory object in Application Composer.
2. Select the **Pages** node.
3. On the Application Pages tab, under Details Page Layouts, duplicate the standard layout to create a new layout.
4. When making changes to the Details page, select the subtab you want to change first. These subtabs are available from the Details page. Use the subtabs to configure which standard and custom fields display at run time. You can also add a new tab.
  - Summary  
This tab isn't extensible.
  - Dimensions  
This tab isn't extensible.
  - Inclusions  
This tab isn't extensible.
  - Exclusions  
This tab isn't extensible.
  - Team Members  
Use the Sales Territory Resource object to create custom fields as needed.
  - Child Territories  
Use the Sales Territory object to create custom fields as needed.

## Custom Territory Attributes

Assign territories using the custom territory attributes. For example, if your organization want to track revenue by different groups of salespeople within their territories - one group to focus on new customers while another group for subscription renewals. Create custom territory attributes to track revenue from both the groups separately. This means that the records are matched with the revenue, based on a new territory or a renewal territory.

## Configure and Extend Territory Management

You can modify a variety of regions in Territory Management using Application Composer. Application Composer lets you create custom fields, actions, and links, which you then add for display.

You can also create custom child objects, which you can add to certain pages as subtabs or tree nodes.

This topic addresses the configurability of the More Details pages only. To understand how to configure the set of application pages for these objects, see the related topic.



To access Application Composer:

1. Go to the **Navigator** menu.
2. In the Configuration section, select **Application Composer**.

## Understanding Which Territory Pages Are Extensible

To modify Territory pages, you need to know which pages and regions are extensible, and which options to select in Application Composer to make those changes..

These Sales objects are associated to Territory pages:

- Sales Territory
- Sales Territory Proposal
- Sales Territory Resource

This table lists Territory pages and regions, and the related objects that you can access in Application Composer to modify those pages. For example, the Territory Team subtab on the Edit Territory Proposal page, Profile tab is extensible. To create custom fields that you can later add to the Territory Team tab, you must select the Sales Territory Resource object in Application Composer and create your custom fields.

| Territory Page | Territory Region                                                                                              | Underlying Business Object                                 |
|----------------|---------------------------------------------------------------------------------------------------------------|------------------------------------------------------------|
| Overview page  | Search dialog                                                                                                 | Sales Territory                                            |
| Overview page  | Details region for a selected territory, Summary region on the Profile tab                                    | Sales Territory                                            |
| Overview page  | Details region for a selected territory, Additional Information region on the Profile tab, Territory Team tab | Sales Territory Resource (child object of Sales Territory) |
| Overview page  | Current Territory Proposals region                                                                            | Sales Territory Proposal                                   |
| Overview page  | Completed Territory Proposals region                                                                          | Sales Territory Proposal                                   |
| Creation page  | Create Territory Proposal dialog from the Current Territory Proposals region                                  | Sales Territory Proposal                                   |
| Details page   | Details region for a selected territory, Profile tab, Summary region                                          | Sales Territory Proposal                                   |

Next, expose your custom fields by accessing the appropriate Application Composer configuration page, listed in the following section.

**Note:** To make only minor user interface changes to Territory pages without creating new objects or fields, use Page Composer instead of Application Composer.

## Adding Your Changes to the User Interface Pages

To add custom fields to the Territory regions listed in the table in the previous section:

1. Navigate to the Application Composer Overview page.
2. In the object tree, select the **Sales Territory** or **Sales Territory Proposal** object.
3. Select the **Fields** node and create your custom fields.
4. Select the **Pages** node.
5. On the Desktop Pages tab, select the configuration page hyperlink related to the Territory region that you want to modify.

This table indicates which Sales objects populate which Territory pages and regions, as well as Application Composer configuration pages where you can make user interface changes on those pages and regions.

| Business Object          | Configuration Page in Application Composer                                                           | Related Territories Page                       | Related Territories Region                                                                   |
|--------------------------|------------------------------------------------------------------------------------------------------|------------------------------------------------|----------------------------------------------------------------------------------------------|
| Sales Territory          | Select the <b>Pages</b> node for this object, then <b>click</b> Edit Local Search.                   | Search Territories page from the Overview page | None                                                                                         |
| Sales Territory          | Select the <b>Pages</b> node for this object, then click <b>Edit Summary Form</b> .                  | Overview page                                  | Details region for a selected territory, Summary region on the Profile tab                   |
| Sales Territory Proposal | Select the <b>Pages</b> node for this object, then click <b>Current Territory Proposals Page</b> .   | Manage Territory Proposals page                | Current Territory Proposals region                                                           |
| Sales Territory Proposal | Select the <b>Pages</b> node for this object, then click <b>Completed Territory Proposals Page</b> . | Manage Territory Proposals page                | Completed Territory Proposals region                                                         |
| Sales Territory Proposal | Select the <b>Pages</b> node for this object, then click <b>Edit Creation Page</b> .                 | Manage Territory Proposals page                | Create Territory Proposal dialog from the Current Territory Proposals region                 |
| Sales Territory Proposal | Select the <b>Pages</b> node for this object, then click <b>Edit Summary Form</b> .                  | Territory Proposal page                        | Details region for a selected territory, Profile tab, Summary region                         |
| Sales Territory Proposal | Select the <b>Pages</b> node for this object, then click <b>Edit Summary Form</b> .                  | Territory Proposal page                        | Basic Information tab on the Edit Territory Proposal dialog from the Territory Proposal page |

### Related Topics

- [How can I configure and extend application pages for territories?](#)

# Create Custom Territory Attributes for Territory Assignment

Create custom attributes for sales territories and then use those attributes in territory assignment to match with customer attributes in the account, opportunity, lead, deal, or partners objects.

These territory custom attributes can be viewed and managed in active territories, territory proposals, REST services, and export and import management.

**Note:** Custom Sales Territory Resource attributes or Sales Territory custom child object attributes aren't supported in territory assignment. Now, let's create and use a custom territory attribute for the sales lead object as an example. Here are the high-level steps:

1. Create a custom attribute for the Sales Territory standard object.
2. Add the custom territory attribute to the Sales Lead assignment.
3. Map the custom attributes you created for Sales Territory and Sales Lead objects.

## Create a Custom Attribute for the Sales Territory Standard Object

1. In an active sandbox, go to the Application Composer.
2. Create a fixed choice list called Branch for the **Sales Territory** standard object.
3. In the List of Values region, create a new lookup type **MKL\_LEAD\_BRANCH** for Branch, and add lookup codes for each of the company branches.
4. Save the field.
5. Next, add the Branch field to the Sales Lead Detail page.
6. Publish the sandbox.

## Add the Custom Territory Attribute to the Sales Lead Assignment

1. In the Setup and Maintenance work area, use the **Manage Sales Lead Assignment Objects** task:
  - o Offering: Sales
  - o Functional Area: Leads
  - o Task: Manage Sales Lead Assignment Objects
2. Select **Sales Lead Territory**.
3. On the Attributes tab, click **Add Row**.
4. From the **View Object Attribute** drop-down list, select a standard or custom lookup field you want to use. For example, assume you created a custom lookup field, Branch. The lookup field will be available in the drop-down list. Select it.
5. Enter **Candidate Information Sequence**. This is the sequence in which the attribute is shown in the displayed record.
6. Leave the **Inactive** check box unselected.
7. Save and publish.

Next, add the attribute assignment mapping to use this attribute to match with a standard or custom Sales Lead attribute, or to filter the matching territories.

## Map the Custom Sales Territory and Sales Lead Attributes

1. In the Setup and Maintenance work area, use the **Manage Sales Lead Assignment Objects** task:
  - Offering: Sales
  - Functional Area: Leads
  - Task: Manage Sales Lead Assignment Objects
2. Select **Sales Lead**.
3. In the Candidates tab, within the Sales Lead Territory: Rule Categories subtab, select **Sales Lead Territory Rule Category**.
4. In the Sales Lead Territory: Mapping Sets subtab, select **Mapping Set 1**.
5. In the Mapping Set 1: Mappings table, click **Create**.
6. Define attributes for these fields:

| Mapping Field                   | Value You Select                                                        |
|---------------------------------|-------------------------------------------------------------------------|
| Type                            | Attribute                                                               |
| Exact Match                     | Select the check box                                                    |
| Candidate Object                | Sales Lead Territory                                                    |
| Work Object                     | Sales Lead                                                              |
| Candidate Object Attribute: Low | Select the custom territory field you created. In this example, Branch. |
| Null Value Handling             | Derive Mapping Value                                                    |
| Work Object Attribute: Low      | Select the custom lead field you created. In this example, Branch.      |

7. Click **OK**.
8. Repeat steps 5 to 7 for each mapping set.
9. Save and publish.

# 52 Extend Sales Forecasting

## Overview of Extending Forecasting Objects

Read this chapter to learn how to extend forecasting objects and pages, and how to extend those objects using Application Composer.

## Configure and Extend Application Pages for Sales Forecasts

Using Application Composer, you can change many items that appear on the application pages for sales forecasts. Use Application Composer to modify these pages:

- Sales Forecasts landing page
- Forecast Details page
  - Products subtab
  - Forecast Items subtab

When you modify the Forecast Details page, you see two versions, or layouts, of the page in Application Composer. Each layout is targeted at a different user:

- The Edit Forecast page is available to sales managers who own a forecasting territory that's a parent of child territories. You can modify both the Products and Forecast Items subtabs using this layout.
- The Review Forecast page is available to salespeople who own a forecasting territory that has no child territories. You can modify only the Forecast Items subtab using this layout.

The Analytics subtab and Unforecasted Pipeline subtab are also available from the Sales Forecasts functional area, but aren't extensible.

## Sales Forecasts Landing Page

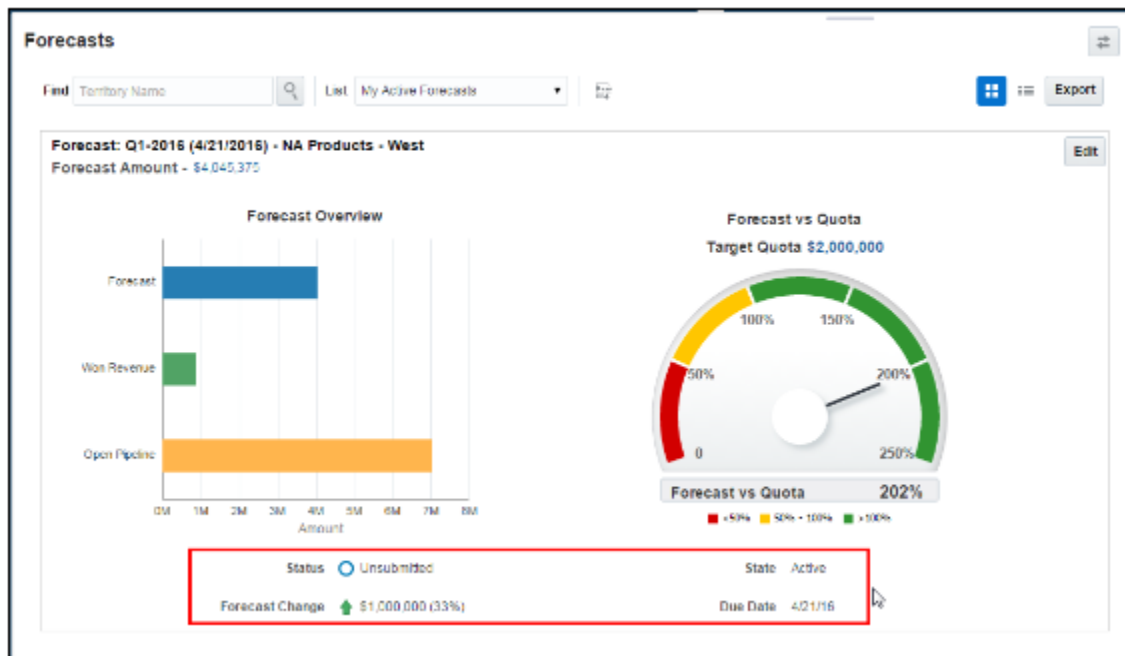
The Sales Forecasts landing page has two views that you can modify in Application Composer:

- The card view
- The summary table view

You can modify the region that appears at the bottom of the card view. You can modify these items in this region

- Hide or show existing fields.
- Add custom fields (all types).

This figure shows the Sales Forecasts landing page card view, with the configurable region highlighted at the bottom of the page.



Note that you can't make changes to these components on the page:

- Embedded analytics
- Custom buttons and actions

This figure shows the landing page table view. You can configure the fields in the table.

**Forecasts**

Find Territory Name [Search] List My Active Forecasts [Dropdown] [Menu] [Export]

| Name    | Due Date | Territory Name     | Territory Owner | Str | Status      | Type    | Forecast    |
|---------|----------|--------------------|-----------------|-----|-------------|---------|-------------|
| Q1-2016 | 4/21/16  | NA Products - West | Mateo Lopez     | ... | Unsubmitted | Revenue | \$4,045,375 |

**Configurable Region (Highlighted):**

- [Menu]
- [Export]
- [List View]

## Products Subtab

The Products subtab includes the Edit Forecast Product Items table. You can modify these items on the Products subtab in the Edit Forecast page:

- Hide or show existing fields.
- Reorder fields.
- Change field labels.
- Add custom fields (all types).
- Add custom actions and links.

## Forecast Items Subtab

The Forecast Items subtab includes the summary at the top of the page, the Edit Forecast Items Search Results table, and the Edit Forecast Items table. You can modify these items on the Forecast Items subtab:

- Hide or show existing fields.
- Reorder fields.
- Change field labels.
- Add custom fields (all types).
- Add custom actions and links.

Note that you can't make changes to these components on the page:

- Actions menu (can't add or hide and show)
- Custom buttons and actions

## Use Application Composer to Modify the Sales Forecasts Application Pages

Before modifying pages, create custom fields and make other changes using the Forecast Territory Details standard object.

1. Navigate to the Application Composer Overview page.
2. In the object tree, select the **Forecast Territory Details** standard object.
3. Select the **Pages** node.
4. Select the Application Pages tab.
5. Use the links on the tab to navigate to the object's configuration pages, where you can modify the available pages.

| Application Page             | Application Composer Configuration Page Link                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sales Forecasts landing page | Edit Forecast Card View<br><br>Edit Summary Table                                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Products subtab              | Duplicate the standard layout in the Details Page Layouts section and edit it, or create a new details page layout. The Products subtab appears only in the Edit Forecast page.<br><br>When working with the details page layout for the Edit Forecast page, navigate to the Subtabs Region and click the Products subtab to configure the Edit Forecast Product Items table.                                                                                                                            |
| Forecast Items subtab        | Duplicate the standard layout in the Details Page Layouts section and edit it, or create a new details page layout. The Forecast Items subtab appears within both the Edit Forecast and Review Forecast pages. You can configure the subtab for both pages by editing the details page layouts for each page.<br><br>When working with the details page layout for both the Edit Forecast and Review Forecast pages, navigate to the Subtabs Region and click the Forecast Items subtab to configure the |

| Application Page | Application Composer Configuration Page Link                                                                                     |
|------------------|----------------------------------------------------------------------------------------------------------------------------------|
|                  | Summary region, the Edit Forecast Items table, and the Edit Forecast Items Search Results table.                                 |
| Custom subtabs   | You can also add subtabs to display records from child or related objects, for example. Click the plus + icon to create subtabs. |