

# Oracle Fusion Cloud Sales Automation



**Using Sales**

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# 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

If you're looking for information about performing day-to-day tasks in your sales applications, then this guide is for you. The information is primarily aimed at salespeople, sales managers, and other sales users who form part of your sales organization.

This guide describes how to:

- Improve and speed up your searches
- Use a single, unified work area with direct access to common actions
- Manage customers and contacts.
- Log sales calls.
- Manage calendars and activities.
- Create and update marketing campaigns and sales leads.
- Create, monitor, and update opportunities.
- View and perform actions from within actionable and Workspace infolets.
- Create and update territories and quotas.
- Use mobile applications with your sales application and use sales assistant.
- View key metrics, such as pipeline revenue, quota performance, and in-context audit to view transaction change history at a glance.

## Related Guides

You can refer to the following related guides to understand more about the user tasks covered in this guide. All of these guides are on [Oracle Help Center](#).

Title	Description
<a href="#">Oracle Fusion Cloud Applications: Using Common Features</a>	Describes user tasks and features that are common across Oracle Applications Cloud.
<a href="#">Oracle Fusion Cloud Sales Automation: Using Incentive Compensation</a>	Describes the user tasks for the incentive compensation business process, from creating and managing compensation plans to reviewing and monitoring incentive plans and performance data.
<a href="#">Oracle Fusion Cloud Sales Automation: Using Customer Data Management for Sales and Fusion Service</a>	Describes user tasks to manage customer information and customer data quality.

Title	Description
<i>Oracle Fusion Cloud Sales Automation: Using Customer Contracts</i>	Describes user tasks for customer contracts including creating customer contracts, authoring of contract terms, and maintenance and configuration of contracts.
<i>Oracle Fusion Cloud Customer Experience: Creating and Administering Analytics for Sales and Fusion Service</i>	Provides advanced instruction on creating and modifying analytics and reports.
<i>Oracle Fusion Cloud Sales Automation: Using Partner Relationship Management for Channel Managers</i>	Describes user tasks to help channel sales managers, channel account managers, and channel operations managers perform day-to-day business tasks.
<i>Oracle Fusion Cloud Sales Automation: Using Partner Relationship Management for Partners</i>	Describes user tasks to help partner sales managers, partner salespeople, and partner administrators perform day-to-day business tasks.
<i>Oracle Fusion Cloud Fusion Service: Using Fusion Service</i>	Contains information to help service managers, service personnel, and other service end users to perform day-to-day business tasks using Oracle CX Service.
<i>Oracle Fusion Cloud Fusion Service: Using Knowledge</i>	Describes how administrators, agents, authors, and other knowledge base contributors can implement and use Knowledge in CX Service.
<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 Sales</i>	(This guide) Aimed at salespeople, sales managers, and other sales users. Contains information about performing day-to-day tasks in the sales applications.

# 2 Get Started

## Overview of the Sales Application

Your sales application from Oracle gives you a single interface to perform a variety of key sales tasks. The easy-to-use design means less time training, so you get up-to-speed quickly.

In addition to presenting core tasks in a simple UI, the application features analytics that provide information when and where you need it. Here's a summary of the key tasks you can accomplish with the applications:

- Manage accounts, households, and contacts.
- Create business plans and manage customer assets.
- Log sales calls and follow up on tasks.
- Manage calendars and appointments.
- Send out marketing campaigns.
- Create and update leads and convert them to opportunities.
- Create, monitor, and update opportunities.
- View competitor information.
- Create and manage service requests.
- Create and update territories and quotas.
- Manage sales forecasts.
- Use and share documents in the Lightbox content library.
- Manage partner information.
- Use the mobile application to manage customer information, leads, and opportunities.
- View sales metrics, such as pipeline revenue and quota performance, at a glance.

## Get to Know the UI and Features

Understanding the main areas of the UI and core features helps you as you work within the sales applications. UI and features include:

- Home page:
  - The home page is your central location to navigate where you need to go to complete important tasks, like updating contact, account, lead, or opportunity information.
  - You can quickly create sales records from just one page. From the Sales tab on the home page, access quick actions to create opportunities, leads, contacts, and activities, including tasks, appointments, and call reports, from a single location.
  - The home page contains a springboard and a panel that shows different useful items, depending on setup. For example, it can show you company announcements or a news feed.
- Springboard:
  - The springboard shows a set of functional area icons.

- Use springboard icons to open pages and applications.
- Accounts and contacts:
  - Create and manage accounts, contacts, and households for selling.
  - View and manage associated items, such as interactions, leads, opportunities, and appointments.
- Calendars, Tasks, and Call Reports:
  - Use calendars and tasks in Activities area.
  - Create and manage appointments and tasks, and associate them with the contacts, leads, and opportunities you're working on.
  - Manage team calendars and respond to autogenerated tasks.
  - Enter and submit call reports.
- Leads:
  - View and edit lead information, including products, budget, and deal size.
  - Create, qualify, and convert leads.
- Marketing campaigns:
  - Create campaigns to target contacts from multiple sources including the contact repository and previous campaigns.
  - Manage all the information related to your campaign such as monitoring responses.
- Opportunities:
  - Create and manage opportunity information, such as owner, product revenue, win probability, sales stage, and more.
  - Manage all the information related to your opportunities like relationships, contacts, appointments, and sales team members from one, convenient portal.
- Sales forecasting:
  - View forecast, pipeline, and won amounts for current, past, and upcoming quarters.
  - See forecast trends over time.
- Partner management:
  - Manage partners, including their leads and opportunities.
  - Review notification requests and manage activities and notes related to partners.
  - Manage partner enrollments.
- Sales analytics:
  - Predefined infolets contain key metrics, such as Top Open Deals or Stalled Deals. You navigate to the infolets using the pagination controls (clickable dots).
  - Gain insight into your performance against your quota.
  - View your pipeline, including total opportunity revenue, revenue per sales stage, and opportunity count in the pipeline.
- Additional configuration (administrators only):



- Set any one of several different themes to change look and feel.
- Change icon style, button shape, and logo to personalize the user experience.
- Configure news and announcements on the home page.

## A Personalized UI

As you work in the sales application, the application saves certain changes you make. This personalization applies only to you, and it remains as you sign out of the application and sign back in.

Here are a couple of ways to improve your own personal application experience:

- **Save searches:** Save your personalized searches in work areas so you don't have to recreate them each time you sign in.
- **Home page:** Show what you want to see or not see on the home page, such as work area icons.

Keep in mind that some changes remain only while you're working on a page, for example, changes to the column widths of a table. When you next refresh the page, even in the same session, table column widths are restored to their original sizes.

### Related Topics

- [Sign In and Get Started](#)
- [How can I change the criteria in saved searches for the global search?](#)

## Overview of Work Areas

A work area is a set of pages that provides everything you need to accomplish a business goal.

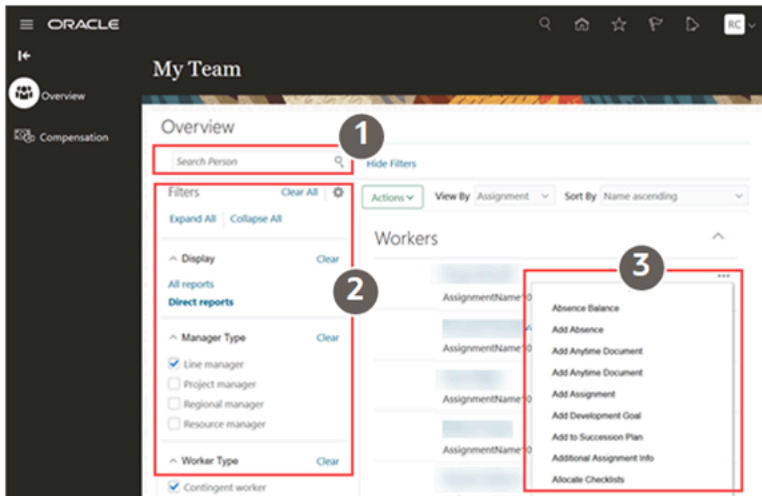


You can use work area icons on your home page or the Navigator to open work areas. When you open any work area, you see a landing page. Landing pages typically summarize data and let you drill down to more details. Often you can change the records that you view by running different searches or filters, or by clicking an infotile, if any on the landing page. Let's explore a couple of work areas.

## Landing Pages with Searches and Filters

Some landing pages have filters you can use to view specific set of records that you're looking for. For example, you can remove some values to exclude records that you don't want to see, and then hide the filters. You can also use the search to find what you need. You can select the **Actions** menu to get going with a few tasks on the specific records, or open the record to see or edit details on another page.

Here's a landing page of a work area, where you use searches (1) and filters (2) to view specific records, and the **Actions** menu (3) to do your tasks.

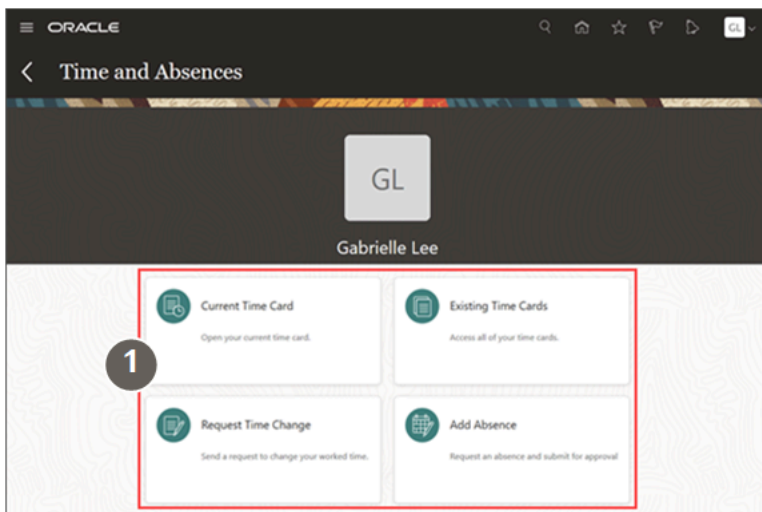


Sometimes, you might find this record in the form of a grid or list. You can use the **Grid** icon and the **List** icon to switch between these two views of the same records.

## Landing Pages with Quick Access to Key Tasks

Now let's see another work area where you get quick access to a set of related tasks. On these landing pages, you easily see the key tasks you can do in the work area.

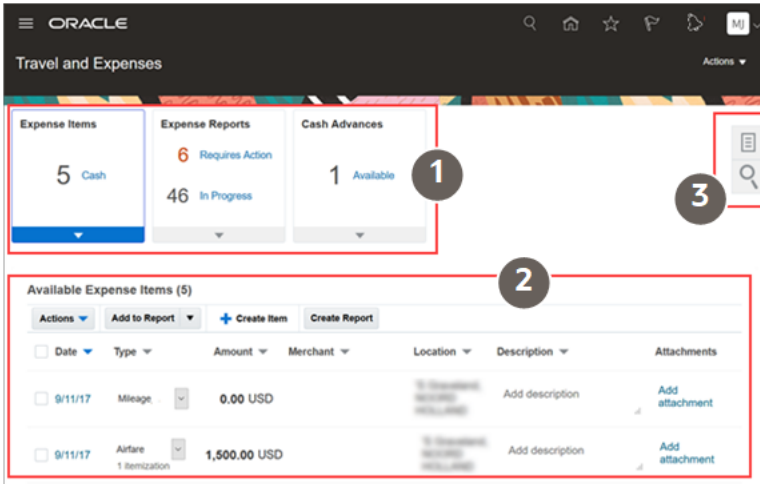
Here's a landing page of a work area, where you can quickly access the key tasks (1).



## Landing Pages with Infotiles

Other than filters and searches, there are other ways for you to get to what you need to work on.

Some landing pages show the work areas with infotiles, which display key information about a set of records. You can click links in the infotile to filter the records. For example, you can see the list of items you need to act on.

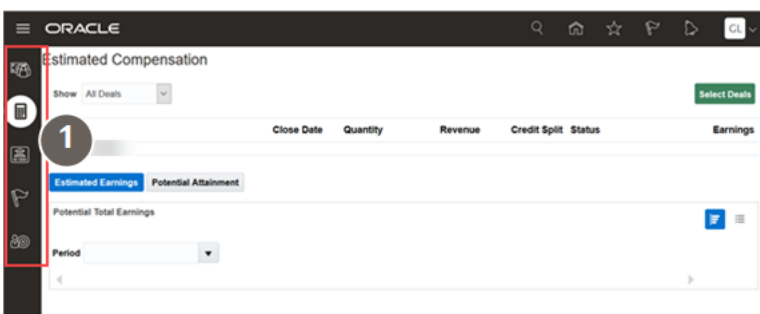


This table shows the available UI elements on the landing page and explains what you use them for.

Callout Number	UI Element	What You Use It For
1	Row of infolets	Display key information about a set of records, such as expense items and expense reports.
2	Summary table	<ul style="list-style-type: none"> <li>View records for the infolet you select.</li> <li>Drill down from the landing page to a specific record.</li> </ul>
3	Panel tab	Do additional tasks, such as use the links to go to related tasks or view reports.

Some landing pages have tabs on the left you can use to go to another page in the same work area.

Here's a landing page of a work area with tabs on the left (1).



## Landing Pages with Infolets

Some landing pages consist of only infolets. This is what a landing page with infolets looks like.

This is what a landing page with infolets looks like.



From an infolet, you can usually open other pages in the same work area or another work area.

There are many other types of work areas, which you can explore!

### Related Topics

- [Sign In and Get Started](#)
- [How You Use Tables](#)
- [How can I show or hide work area icons on my home page?](#)
- [Overview of Infolets](#)

## About Recent Items

Whenever you view records or make changes to records, that event gets added to your recent items list. Recent items help you when you search or enter information, because they automatically populate items you've recently viewed or accessed.

Recent items are available in:

- Find search boxes on landing pages
- Favorites and Recent Items list (accessible from the global header)
- In search boxes in application page, such as when adding an opportunity to an account

## Scenarios for When Recent Item Relationships Occur

These simple scenarios illustrate when the application establishes a recent items relationship:

- You create a record, such as a lead, an opportunity, or an activity like a task or appointment.
- You drill into the edit page of a record that's not among the recent items, for example, you open a task.
- You sign 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.

- You edit Opportunity 2 and save the opportunity.
- You go into the same appointment and remove Opportunity 1, and then click 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.

Your administrator can configure how long to keep recent items in the database. The default is 30 days.

## Mark Favorite Records

Mark your favorite records so that you can find them more easily. To mark a favorite record, you:

- Click the favorite icon in the edit page of a record.
- In Workspace, click the favorite icon for the record in the list page.

**Note:** Your administrator must enable the favorites functionality in Workspace. See the related topic, [Enable the Favorite Field for Quick Access to Records](#).

You can mark favorites in these areas:

- Accounts and contacts
- Assets
- Activities
- Campaigns
- Deal registrations
- Leads
- Opportunities
- Partners and partner contacts
- Territories
- Custom objects

You can also mark favorites in the CX Sales Mobile app and in Sales for Microsoft 365.

### *Related Topics*

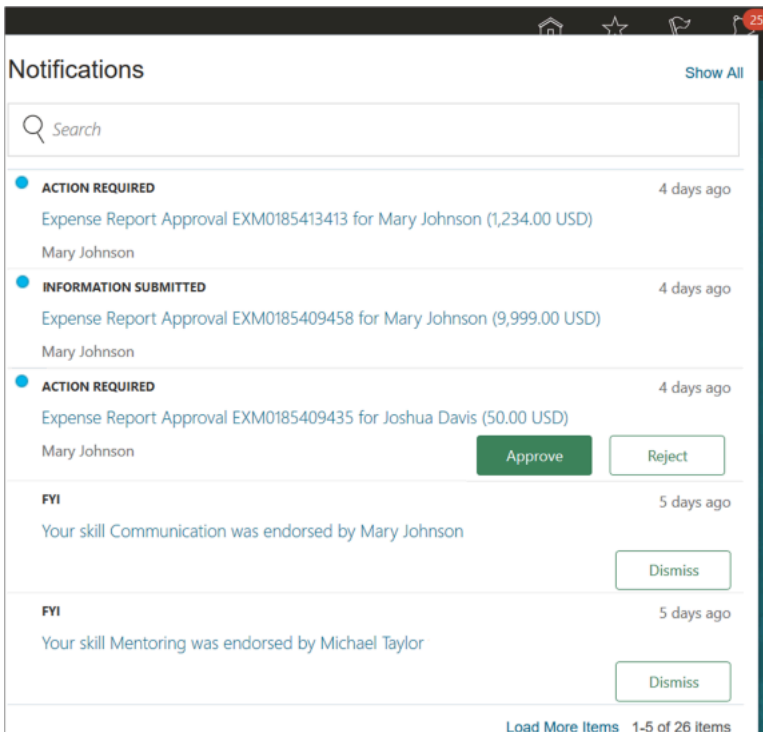
- [How can I mark favorite records in Workspace?](#)
- [Enable the Favorite Field for Quick Access to Records](#)

## View and Act On Notifications

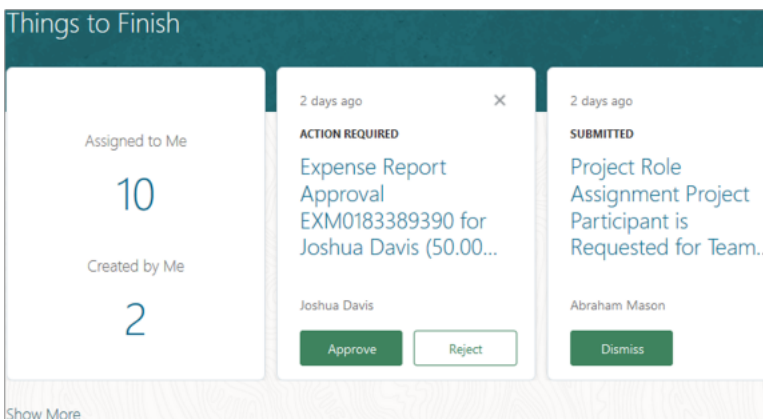
Notifications alert you that something requires your attention or action. Click the **Notifications** icon in the global header to open your notifications list. The number on the icon indicates how many pending notifications you haven't acted on or dismissed yet.

Most notifications are for workflow tasks, but not all. So it's possible that what you see in the list isn't the same as what you see assigned to you in the Worklist: Notifications and Approvals work area. Also, for one task you see in that work area, you might get more than one notification. For example, one notification that someone requests information from you about the task, and later another notification that the task is approved.

Here's an example of the notifications list in the global header. The Notifications icon says there are 25 pending notifications. The first three are new ones you have never seen before and require some action on your end. The third one you can approve or reject without even opening the notification. The next two are just FYI.



On your home page, you can also find notifications in the Things to Finish section, which looks like this.



The first card in the Things to Finish section has two numbers:

- **Assigned to Me:** The number of notifications assigned to you either to act on or just FYI, in this case 10. The rest of the cards in the Things to Finish section are the notifications assigned to you, the exact same as the pending notifications you see in the global header.
- **Created by Me:** The number of workflow tasks you submitted that are still pending final approval, in this case 2.

Here are some things to know about both the Things to Finish section and the notifications list in the global header:

- From either place, you can open the Notifications page. That's where you can view and manage all your notifications in one place, not just the ones that are pending and assigned to you.
- Updates you make to workflow tasks in the global header, for example approving them, are automatically reflected in the Things to Finish section. Same goes the other way around, too. But changes you make elsewhere and changes that someone else makes aren't reflected in either place until the **Synchronize Notifications in Global Header** process runs, for example every two hours. The scheduled process updates workflow notifications with the latest task status and removes notifications older than 30 days no matter the status. For example, you approved one task from email, and someone else in the approval group that you're part of rejected another task from their notifications list. After synchronization, the notifications asking approval for these two tasks are removed from your list in the global header and your Things to Finish section. Because these tasks are no longer pending for you, based on the latest task status.

No matter where you see the notification, some aspects, for example the title or the Approve and Reject buttons, might not be in the same language that you selected when you signed in to the application. That text is displayed in the language that was used when the notification was generated.

## How You Address Your Notifications

To view and act on notifications in the Things to Finish section, the global header, or the Notifications page:

1. Click the **Notifications** icon in the global header, or go to the Things to Finish section on the home page.
  - Here are a couple of things to know about the list that opens up in the global header:
    - The **New** icon (a blue dot) identifies any new notifications. Even if you close the list now without doing anything else, the same notifications are no longer new the next time you open the list.
    - You can search based on the text of the notification titles in the list. For example, if you search by the term **reports**, search results include all notifications with **reports** in the title, but not the ones with **report**.
  - In the Things to Finish section, you can click the **Close** icon just to remove the card. The notification is still assigned to you, so you can still find it, for example, in the global header or the Assigned to Me tab on the Notifications page.
2. Go on to the next step, or click one of these links to open the Notifications page:
  - **Show All** from the notifications list in the global header
  - A number on the first Things to Finish card to open the corresponding tab on the Notifications page, Assigned to Me or Created by Me
  - **Show More** in the Things to Finish section
3. For a notification that requires action, you have a few options:
  - Click the **Approve** or **Reject** button, where available.
  - Open the **Actions** menu and select an action, where available.
  - Click the notification title to see the details and select from all available actions. Depending on what the notification is about, some actions might not apply. For workflow tasks, you get the same task details that you do from your worklist, using the Worklist: Notifications and Approvals work area or region.
4. For a notification that doesn't require action, you also have a few options:
  - Click the **Dismiss** button to acknowledge the notification. For workflow tasks, this option is available only for FYI tasks. The FYI task itself isn't marked as acknowledged, so it's still pending to be either manually or automatically completed.

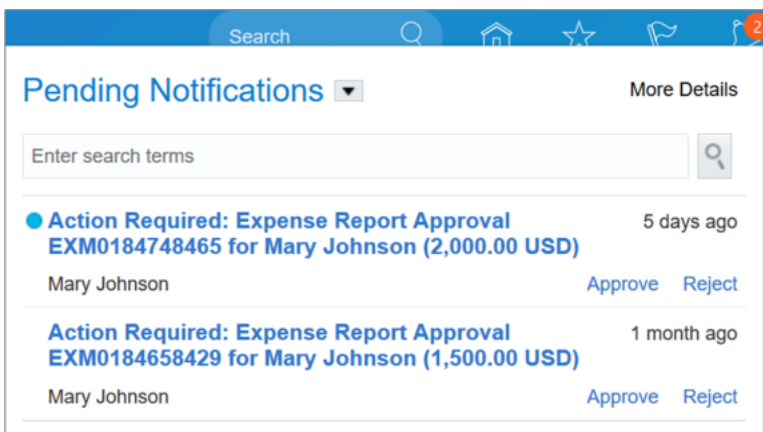
- On the Assigned to Me tab on the Notifications page, click the **Dismiss All** button.
    - For workflow tasks, this option is available only for tasks where action is already taken and there's no more action pending with assignees. For example, the task is approved or withdrawn. This option doesn't apply to FYI workflow tasks.
    - If you still see some notifications after you click **Dismiss All**, those are notifications for FYI workflow tasks, notifications that still require action, or notifications that you have to first open up to see details before dismissing.
  - Click the notification title to open the details.
  - Just read the notification title, if the title is text-only and not a link because there aren't any details to display.
5. On the Created by Me tab on the Notifications page, you can see the workflow tasks you submitted that are pending final approval or already completed. Where available, you can take action on the pending items, for example to withdraw your request.

No matter which option you choose to address notifications that require action or not, the notification is taken off the list in the global header and is no longer assigned to you in the Things to Finish section or the Notifications page. You can still find the notification on the All tab on the Notifications page.

## Use Alternate Notifications UI

If your administrator has selected the panel or banner home page layout, then you get an alternate UI when you click the **Notifications** icon in the global header. Also, the Things to Finish section and Notifications page aren't available.

Let's take a look at the alternate notifications list. In this example, you have two pending notifications, the first one you have never seen before. You can approve or reject both notifications without even opening them.



Here's how you use the alternate notifications list in the global header:

1. Click the **Notifications** icon in the global header.

In the list that opens up, the **New** icon (a blue dot) identifies any new notifications. Even if you close the list now without doing anything else, the same notifications are no longer new the next time you open the list.
2. Take any of these steps to get another view of notifications:
  - Click the drop-down button to switch between pending notifications and all notifications.
  - Search based on the text of the notification titles in the list. For example, if you search by the term **reports**, search results include all notifications with **reports** in the title, but not the ones with **report**.
  - Click the **More Details** button to view and manage workflow tasks in your worklist.



**3.** For a notification requiring action, you have a few options:

- Click the **Approve** or **Reject** link, where available.
- Open the **Actions** menu and select an action, where available.
- Click the notification title to see the details and select from all possible actions you can take. For workflow tasks, you get the same task details that you do from your worklist, using the Worklist: Notifications and Approvals work area or region.

The notification goes off the pending list now that you have acted on it.

**4.** For a notification that doesn't require action, you also have a few options:

- Click the **Clear** icon that appears when you hover over the notification, to dismiss the notification.
- Click the notification title to open the details.
- Just read the notification title, if the title is text-only and not a link because there aren't any details to display.

In all cases, the notification is considered read and taken off the pending list. To keep a notification as pending, you can click the **Undo** link that temporarily shows up near the notification title after you click the title or **Clear** icon.

*Related Topics*

- [Use Your Worklist to Manage Workflow Tasks](#)
- [Actions and Statuses for Workflow Tasks](#)
- [Synchronize Notifications in the Global Header and Home Page with Workflow Tasks](#)
- [How do I remove notifications from the global header and home page?](#)
- [Why are workflow notifications that I acted on still in the global header and home page?](#)

## Get Help in the Application

To get help for what you're working on, use help icons that are on many of the pages. The icons open help windows that can have informational text, links to help content, and maybe even help that your company added.



If you have an issue that you still can't resolve, you might need to contact your help desk or try to troubleshoot yourself if possible, for example by running diagnostic tests.

## Use Help Windows

Here's what you do:

- 1.** Click a help icon. The help window gives you information specific to the page or part of the page that the icon is on.

2. In the help window, click any of the links available.
  - You see help links in your preferred language only if there's content in that language. If not, you see links in English.
  - Help content opens in a new browser tab so you can keep that open while you work.
  - You can do more with the help than just read it. Options can include sharing or downloading the help.
3. Most of the links open guides in the Oracle Help Center.
  - Use the Table of Contents tab to move around in the guide for other information. Or, to search within the guide, use the search in the Oracle Help Center global header.
  - You can also use the panel on the opposite side of the table of contents to jump directly to a specific section of the help that's currently open. Click the **Secondary section** icon to hide or show this panel at any time.

## What to Do If You Don't See Help Icons

If you don't see any help icons on the page, click your user image or name in the global header and select **Show Help Icons**. You reveal any icons on your current page, and any other page you might use, but not all pages have help icons. In that case, click your user image or name in the global header and select **Applications Help** to open the Oracle Help Center.

### Related Topics

- [Find Guides, Readiness Material, and Other Resources](#)
- [Oracle Help Center](#)
- [What's a help desk?](#)
- [Troubleshoot Issues](#)

## 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:

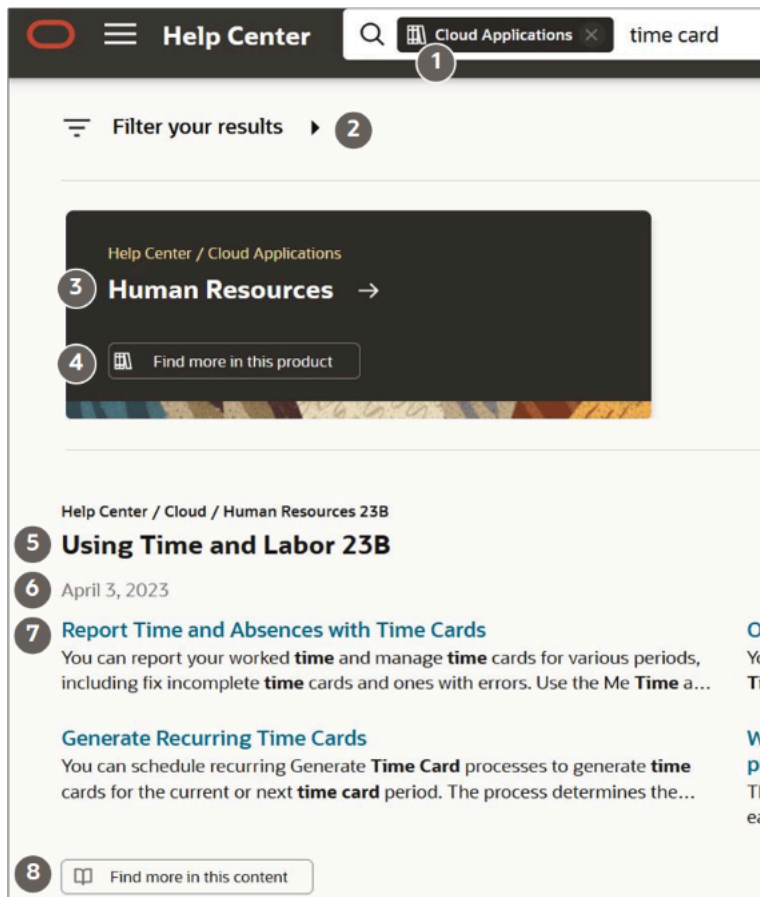
1. From anywhere in the Oracle Help Center, open the main menu and select **Fusion Applications Suite** under Cloud Applications. Or, click **Fusion Applications Suite** on the Help Center home page.
2. On the Oracle Fusion Cloud Applications Suite page, browse the cloud services which are organized 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:
  - o 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](#)

## Why can't I see all the items in my browser window?

If you're using the application primarily on a tablet or other small screen and can't see all the items on the screen in the browser, ask your administrator to check the value of the profile option, Advanced Responsive UI features.

This profile option, when set to Yes, means the application better displays content on smaller screens.

### Related Topics

- [Optimize Browser Space in Work Area and Detail Pages](#)

## Why does the Date field display a different value than my preferred date?

By default, the **Date** fields that don't have any associated time values show the date in the server time zone, UTC, irrespective of your preferred time zone.

Also, if you're using the calendar date picker to set today's date, the **Date** field gets populated with the current date in the server time zone, not your preferred time zone.



# 3 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](#)
- [Designate Proxies](#)
- [Create Additional Resource Roles](#)
- [How do I change user resource roles when job assignments change?](#)
- [Impersonation Audit](#)
- [Configure Impersonation Auditing](#)
- [About Transferring Records Between Users](#)

## 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.

## 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.

## 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.

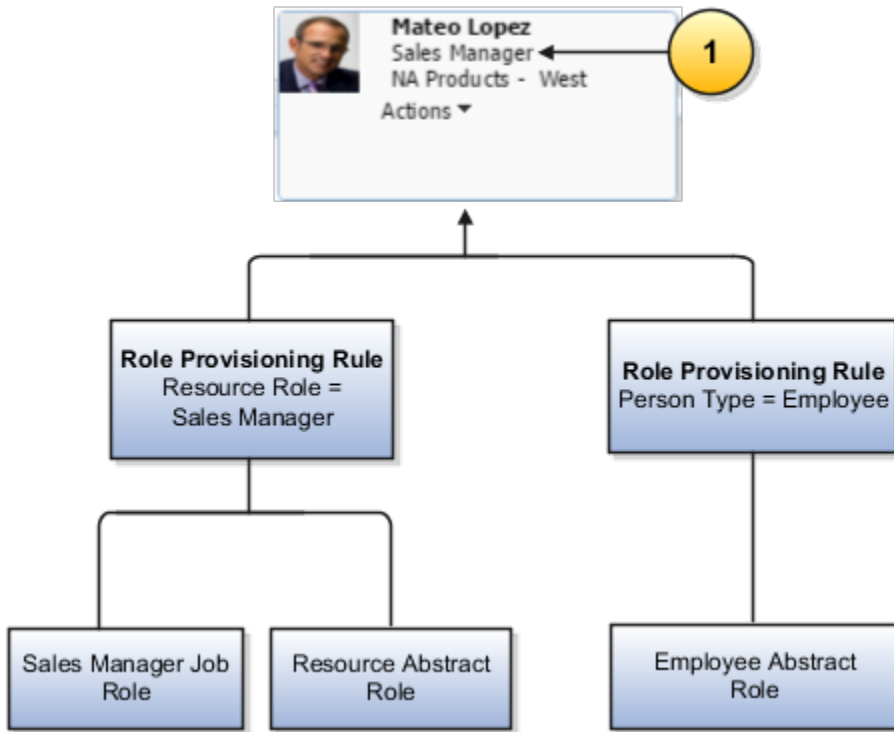
Oracle follows the industry standard Role Based Access Control approach to security. In Oracle Applications, the privileges are bundled in:

- 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](#)

## 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.

## View Resource Information

You can use the Resource Directory to view the detailed information about the resources in an organization. Sales representatives and sales managers are examples of resources.

As a sales representative, you can view the profile details of the resources within your organization. You can also modify part of your own profile, skills, and additional contact information. As a sales manager, you can modify the skill information of your direct and indirect reports.

Here's how you view the details of a resource:

1. Click **Navigator > Resource Directory**.

The page displays the organizational structure between you and your manager.

2. View your details or another resource's details using the following steps:

- o Click **Tasks > View Resource Details** to view your details.

The Resource page with your details appears.

- o Click **Tasks > View Resources** to view the profile information of another resource.

The View Resources page appears. You can search for the required resource and click on the resource name in the search results to view the details of the resource. Note that the Effective As-of Date defaults to the system date for predefined resources. If a resource has been end dated earlier, the resource won't appear in the search results. Therefore change the Effective As-of Date so that it falls between the resource's start date and end date, that's when the resource was active.

The Resource page displays the details about the resource, such as usages, registry ID, manager, job title, department, roles, mail stop, phone, email, address, and time zone.

3. In the Resource page, you can see the details about a resource, such as usages, registry ID, manager, job title, department, roles, mail stop, phone, email, address, and time zone.

- o **Organizations:** Displays the organization membership details of the resource such as role, organization, usage, and manager.
- o **Teams:** Displays the team information of the resource, such as role, team, team usage, and team manager.
- o **Roles:** Displays the role information of the resource, such as role name, member, manager, administrator, and lead.
- o **Skills:** Displays the skills of the resource, such as accomplishments, skills, competencies, degrees, honors and awards, languages, licenses and certifications, problem codes, and work requirements.
- o **Additional Contact Information:** Displays additional contact point information such as phone, email, web, and contact preferences.

4. Click **Save** if you made any updates, or else click **Cancel**.

*Related Topics*

- [Frequently Asked Questions \(FAQs\) for Resources](#)

## Designate Proxies

Here's how you can designate a proxy to work on your behalf.

1. Click your user image or name in the global header, and on the **Settings and Actions** menu, select **Set Preferences**.
2. Click **Proxies**.
3. Click **Actions > Create**.
4. Search for the person you want to designate as your proxy.

**Note:** If you can't find the person you want to designate as a proxy, ask your administrator to check if the person has the Impersonate User (FND\_IMPERSONATE\_USER\_PRIV) privilege.

5. Verify the user details and click **Apply**.
6. Click **OK**.
7. Select the start and end dates.
8. Click **Save and Close**.

#### *Related Topics*

- [Work as a Proxy](#)

## Work as a Proxy

You must have the Impersonate User (FND\_IMPERSONATE\_USER\_PRIV) privilege to work as a proxy, which means on behalf of another user.

1. Click your user image or name in the global header to open the **Settings and Actions** menu.
2. Click **Switch To** and select the user you want to work on behalf of.
3. Enter your password.
4. Click **Confirm**. You're ready to work as a proxy.

As a proxy, you can access all the data and tasks of the actual user. All the tasks you do are logged as though the actual user worked on them. After you're done working as that user, switch to another assigned account, or sign out and sign back in to your own account.



# 4 Workspace and Work Areas Search

## Get Started with Search in Workspace and Work Areas

Both Workspace and the work areas targeted at individual business objects now provide the same superior search experience enabled by the high-performance Adaptive Search engine.

Workspace makes it possible for you to work on all the business objects within a single, unified work area. The work areas handle one at a time. You automatically get the same improved Workspace functionality in the Accounts, Contacts, Leads, Opportunities, and other work areas if you're a new customer. If you're an existing customer, your sales administrator must opt in to the new feature Default Navigation to Workspace.

Saved searches are saved search criteria that generate the list of results as soon as you select them. When you open Workspace or one of the new work areas, you see a list or records generated from the saved search specified as your default saved search. Your administrator assigns the default for your role, but you can choose your own personal default as well.

To list all the records you can view, select the saved search with "All" in the name, such as "All Accounts" and "All Opportunities". If you don't see the item you're looking for or the list is too long for you to scroll through, you can search for the item in the list using the **Search** box. All search terms returned are highlighted in bold font in the search results.

Enter complete words as search terms or use the star (\*) to indicate missing characters. Searches in Workspace and the new work areas search across multiple fields, including fields from different business objects. So, searching on the word `main`, might return Main Plumbing and Oracle on Main Street.

In the Search box, you can also:

- Take advantage of the enhanced autocomplete feature in the search box to help you add and apply filters to the results. Autocomplete reduces the number of clicks and let you filter results without opening the Show Filters pane.
- Narrow down searches by using quotes on multiple words.

Searching on `"main plumbing"` instead of `main` narrows down your search.

- Use the preferred operators + (plus symbol), | (pipe symbol) and - (minus symbol) in place of the boolean operators AND, OR and NOT respectively. For example, entering `+ oracle -"Redwood"` returns Oracle locations not in Redwood city.

**Note:** If you don't specify any operator and use a space, then it's considered as an implicit AND and there's no need to add the + sign. For example, entering `"oracle Redwood"` will get back results having both Oracle and Redwood keywords in them. So Oracle Redwood will give the same results as `"oracle + Redwood"`

- Use the Between operator for a date field. You're prompted to enter a specific date range for the search, such as between 1/3/2021 and 1/5/2021. Workspace search returns all records for January 03 2021 to January 04 2021, but it doesn't return records for 05 January 2021. This is because Workspace considers the given filter values between 03-01-2021 12 AM and 05-01-2021 12 AM.

Remember that your search is restricted to the records within the saved search you selected.

## Business Objects Covered by Workspace and the New Work Areas

Here are the objects covered by Workspace and the new work areas powered by Adaptive Search. Which work areas and objects you use in your application is specified at setup.

### Where Adaptive Search is Available

Business Object	Workspace	Work Areas Powered by Adaptive Search
Accounts	Yes	Yes
Activities	Yes	Yes
Assets	Yes	Yes
Campaigns	Yes	Yes
Competitor	Yes <b>Note:</b> This unique object doesn't have a list page of its own in Workspace.	No
Contacts	Yes	Yes
Deal Registrations	Yes	Yes
Leads	Yes	Yes
Opportunities	Yes	Yes
Partners	Yes	Yes
Partner Contacts	Yes	No
Quotes and Orders	Yes	Yes
Quote and Order Lines	Yes	No
Revenue Lines	Yes	No
Service Requests	Yes	No
Territories	Yes	Yes

**Note:** Not all the objects are sales objects. Partners and Partner Contacts 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. You can also access and manage any custom objects or child objects that your administrator created in Application Composer.

**Note:** Many customers run their applications and Oracle Databases in their own data centers on Oracle Cloud@Customer. Currently, Cloud@Customer and U.S. government pods don't support Adaptive search.

## Improve Sales Productivity with Workspace

Workspace improves and speeds up searches and makes different types of sales information available all within a single, unified work area.



No more navigation to the Opportunity work area to see your key opportunities and then to the Lead work area to work on your leads. Not only do you minimize navigation, but you also eliminate search. Workspace makes it possible to keep multiple records open as tabs and to take common actions on records without having to drill down into them.

**Note:** Service users can keep multiple records open at the same time in nested tabs, a Workspace feature not available to the sales job roles provided by Oracle. If you want to use the nested dynamic tab capability, get your administrator to create custom job roles with the appropriate additional privileges. 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, Territory, Campaign, and custom objects through the Workspace UI.

## How Salespeople Search in the UI

The same create and edit pages and most other features are available in Workspace as in the individual work areas. Here are some key things you can do when searching in either the Workspace UI or in the work areas powered by Adaptive Search. For details about configuring adaptive search behavior, see the Implementing Sales guide for setup details.

When you open Workspace, select the business object and saved search you want to display. The saved search determines the scope of any search you perform on the page. You can enter one or more search terms in the **Search** field or you can search using multiple attributes, both from the business object you're searching and from related objects. For example, when searching an account in the Account work area, you can search by company name, the city where the account is located, or the primary contact at the company. You can even search for an account by the name of the salesperson on the sales team.

The saved search you select determines the scope of your search. 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 save any search criteria you enter as your own personal saved search by clicking Save As. The search results match whole terms, but you can use the (\*) wildcard for partial words. For searches with multiple terms, you can use the OR and NOT operators. For example, searching for "Oracle NOT Portland" returns Oracle locations not in Portland.

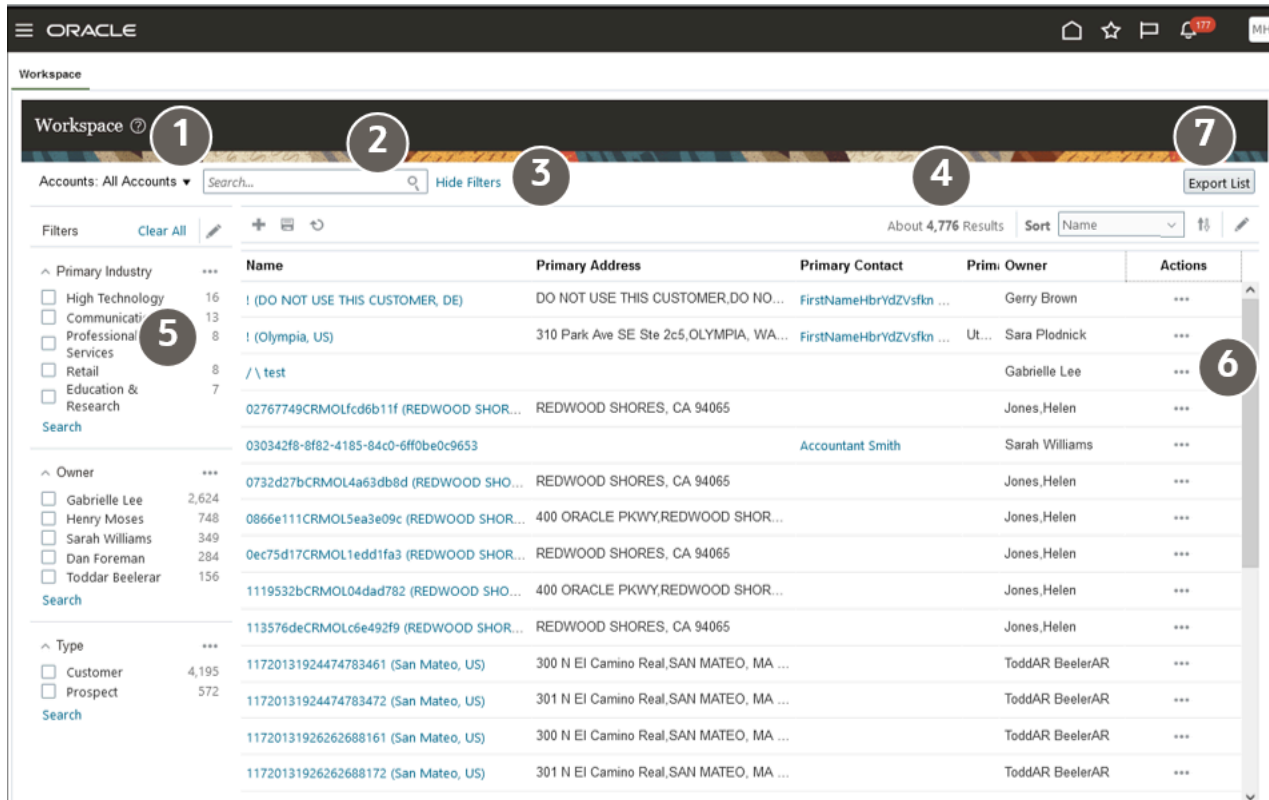
You can view the filters used in the saved search by clicking the **Show Filters** link. You can also add filters of your own. Filters show the most common values and the number of records in each. For example, a search of accounts with the

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. Your filter selections are additive, if you select Health Care as the primary industry and then Lisa Jones as the owner, the search displays only those Health Care accounts Lisa owns.

Here's a screenshot of Workspace highlighting some of the key features.

Callout Number	Feature Description
1	Here's where you select the object and saved search you want to display in Workspace.
2	The Search field makes it possible to search within the constraints of the existing search. If you select, Accounts, My Accounts, you get to view and search only the accounts where you're on the territory or in the sales team. Selecting Accounts, All Accounts, lists all accounts you can view and makes it possible for you to search them.
3	You control the display of filters by clicking Display Filters and Hide Filters links. Filters automatically display top values in your data. For example, the Industry filter lists the number of accounts in each of the top five industries, so you can quickly see the list of accounts in each.  For more details, see the Refine Search Results Using Filter Values topic.
4	Workspace displays the list of records matching the saved search criteria and provides you with a record count. For more details, see the Display a List of Items Using a Saved Search topic.
5	Filters display the items with the highest number of records. You can select filters to narrow down the list.
6	You can log calls, take notes, create tasks, and take other actions on items on the page without having to drill down into them. For accounts, you can even create an opportunity. For more details, see the Create Records and Take Actions on Items Displayed in Workspace topic.
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.





## Search and Filter

### Search for the Information You Need

Here's how to search for the information you need.

1. Select a saved search as your starting point. For example, the All Accounts saved search provided by Oracle lets you search all the accounts you can see. The My Accounts saved search restricts your search to the accounts you own.
2. Explore your data and refine your search by adding filters and selecting filter values.
3. Find an item in the list by entering keywords in the search box.

#### Related Topics

- [Refine Search Results Using Filter Values](#)
- [Find an Item in the List of Search Results](#)

## Refine Search Results Using Filter Values

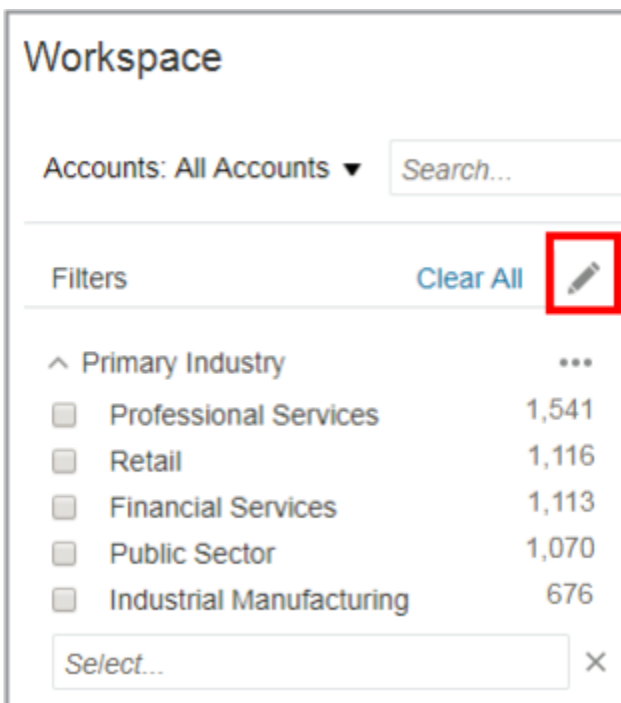
Use filters to narrow down the list of search results, focus your search, and explore your data. Just click Show Filters to display the predefined filters for the saved search you selected. Now you can do any of these tasks:

- Add fields as filters.
- Select one or more filter values on the page to narrow down the list.
- Add filter values not displayed on the page.
- Filter records based on fiscal quarters.
- Use operators and multiple search terms. For example, you can search for items that are missing information.
- Change the scope of your search.
- Find an item in the list of search results.

**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.

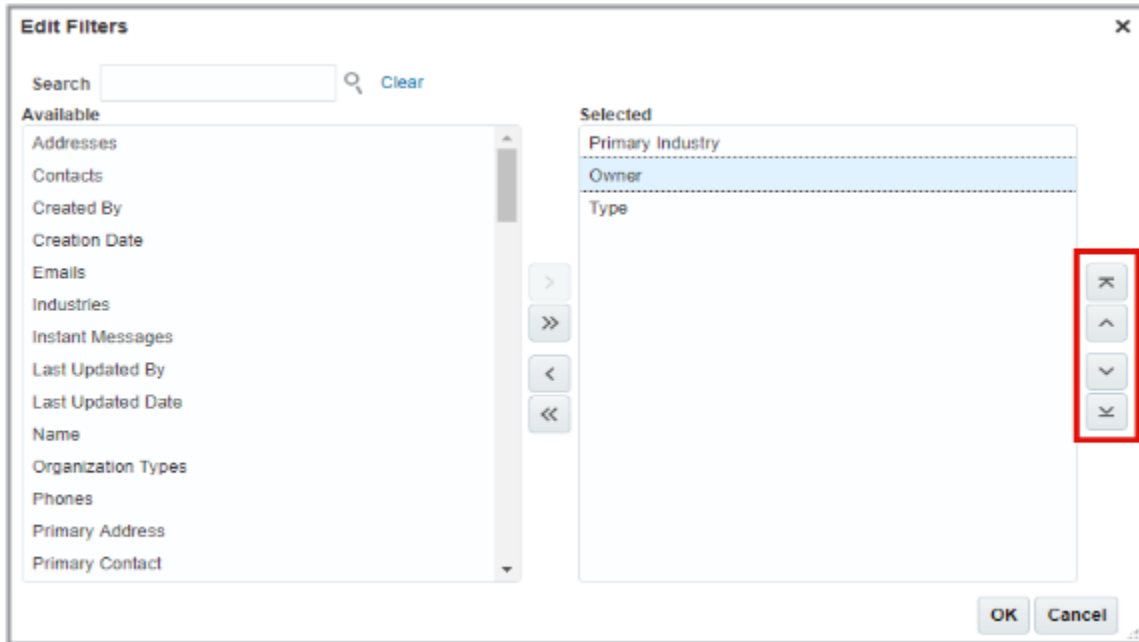
## Add Fields as Filters

Add a filter by clicking **Edit Filters** (the pencil icon highlighted in the screenshot). If you add the Name field and reenter your search term, the search results are narrowed down to those items with your search term in the Name field. Specifying multiple filters for a query is treated as an implicit AND.



You can change the order of the filters in the Edit Filters window using the move controls, the up and down arrow icons highlighted in the next screenshot.

The effect of the filters is additive, so always add the broadest filters first. For example, selecting the primary industry first and the owner of the record second will display more results than selecting the owner first and the industry second.

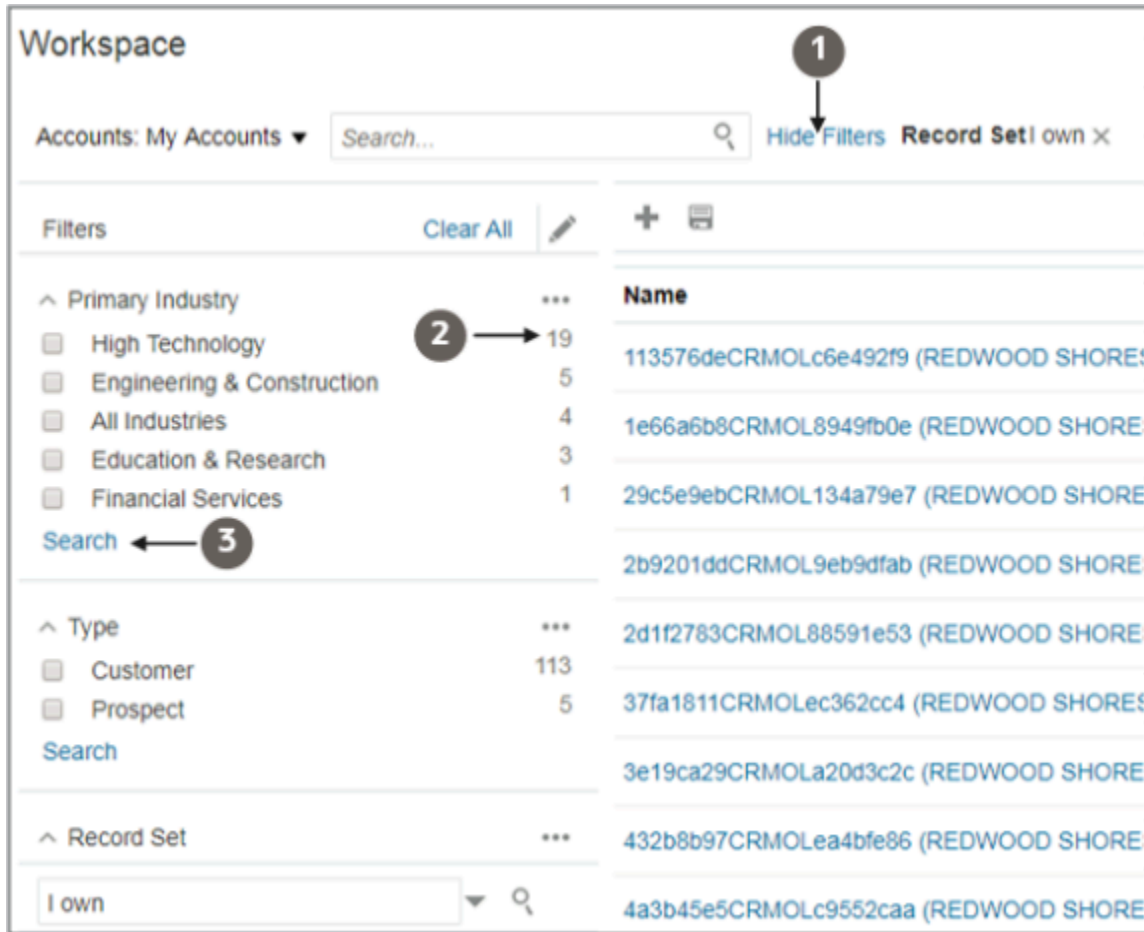


## Select One or More Filter Values on the Page

You can narrow down your search by selecting one or more filter values. Each filter shows up to five of the most frequent values (or ranges of values) in your data and displays the number of records for each value. For example, if your accounts are classified by industry, you can select the High Technology and Financial Services values from the Primary Industry filter to display only the accounts in those two industries.

Here's a screenshot of the Filters panel with callouts highlighting the different filter features. The screenshot shows Workspace, but the different work areas work the same.

Callout Number	Description
1	Show Filters and Hide Filters control.
2	Number of records for each filter value.
3	Search link you click to add more filter values.



## Add Filter Values

If you don't see the filter value that you need among the top five, you can select more values by clicking **Search** at the bottom of the filter values.

Placing your cursor in the field displays a partial list of unused values sorted alphabetically. You can also search for other filter values using the Select field. For example, you can enter "Media" to search for "Media and Entertainment".

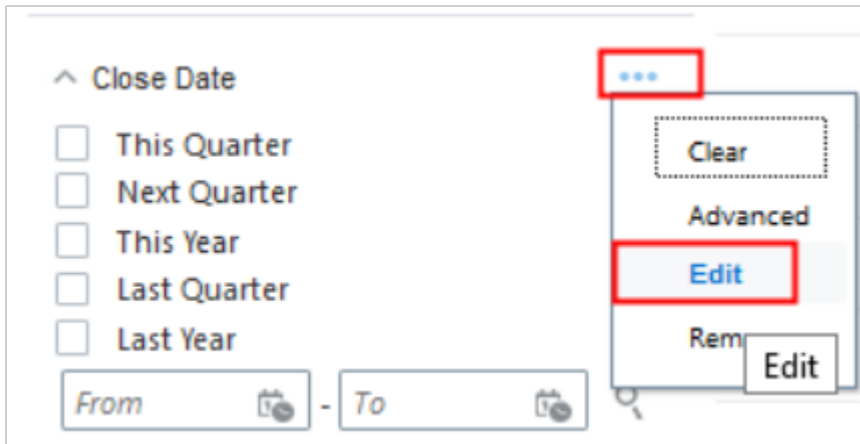
## Filter Records Based on a Fiscal Quarter

You can filter records based on a fiscal quarter or fiscal year rather than the default calendar quarter and year. For example, the filter **This Fiscal Quarter** on the opportunity Close Date attribute is based on the fiscal quarter calendar. This can be really useful to have views such as Opportunities closing in current and next fiscal quarters or Leads generated in a previous fiscal quarter.

Follow these steps to add the fiscal quarter or fiscal year filters for the opportunity close date:

1. Click **Show Filters**.

- Click the ellipsis icon (More) icon next to Close Date as shown.



- Click **Edit** to display the **Search and Select** dialog.
- Select the fiscal quarter or fiscal year fields on the left pane and move them to the right pane.
- Click **OK**.

You can now apply fiscal quarter or fiscal year filters for the Close Date field.

## Use Operators and Multiple Search Terms

You can refine your search filtering even further by clicking the ellipsis icon (**More**) at the top of the filter and selecting **Advanced**.

Here's a screenshot of the ellipsis icon (**More**) (callout 1) and its menu with the **Advanced** option (callout 2).



The Advanced mode lets you select an operator for your search and to compose complex queries. Operators let you specify if you're looking for exact or approximate match, for example, and even permit you to search for missing and blank values. Which operators are available depends on what you're searching for and decisions your application administrator makes during setup.

Text fields, such as the account name or the name of the account owner, can include search operators listed in this table:

Text Search Operators	Function
All of the Words	All of the search terms must be present.
Any of the Words	Any of the search terms must be present.

Text Search Operators	Function
Contains	The results include entries that contain the search term you enter.
Ends with	The results include entries that ends with the search term you enter.
Equals	The results must include the search terms in the exact case of the search term because searching on Equals is case-sensitive.
Exists	Finds the records with any value in the field.
Fuzzy Match	Finds records with similar spellings.
Is Missing	Finds all the records missing values.
None of the Words	The results exclude entries with the words you enter.
Not Equal to	Finds all records that don't match the search terms in their order.
Starts with	Finds all records that start with the search term you enter.

Numeric fields, such as opportunity Win Probability, can contain these search operators:

Numeric Search Operators	Function
Between	<p>The results fall between two entries.</p> <p><b>Note:</b> Workspace search doesn't include the To Date field value in the Date filter if using this operator.</p> <p>For example, let's say you perform a search for Opportunity records with the filter Close Date between 1/3/2021 and 1/5/2021. Workspace search returns all opportunity records having Close Date value as 03 January 2021 to 04 January 2021, but it doesn't return records having a close date of 05 January 2021. This is because Workspace considers the given filter values between 01-03-2021 12 AM and 01-05-2021 12 AM. Any records that have a value for 5 January 2021 won't be displayed in the results.</p>
Equals	The number must equal the search term.
Exists	Finds the records with any value in the field.
Greater Than	Finds records with values greater than the entry.
Greater Than or Equal to	Finds records with values greater than or equal to the entry.

Numeric Search Operators	Function
Is Missing	Finds all the records missing values.
Less Than	Finds records with values less than the entry.
Less Than or Equal to	Finds records with values less than or equal to the entry.
Not Equal to	Finds all records not equal to the entry.

You can add search terms by clicking **Add**. Specifying multiple search terms for a filter is treated as an implicit OR. For example, to search for all the accounts with primary addresses in the Chinese cities of Yiwu and Hefei, you enter these operators and search terms in the Primary Address filter:

Operator	Search Term
All of the Words	Yiwu
All of the Words	Hefei

## Change the Scope of Your Search

Each search is conducted within a set of records specified in the saved search. For example, the **All Accounts** saved search lets you search within all of the records you can view, but the **My Accounts** saved search lets you search within the set of records you own.

You can change the scope of your search by showing filters and selecting a different record set from the **Record Set** list.

Selecting a record set can broaden or restrict the set of records you're searching. Not all record sets are available for every object or to every user. For example, sales territory record sets only apply to business objects that use sales territories and only managers can view records of their subordinates.

Here's a table that lists some of the more common record sets.

Record Set	Description
All records I can see	Provides the broadest search. Which records you can view is determined by your job role and your position in the resource hierarchy.
I am on the team	Records where you're on the team.
I own	Records where you're listed as the owner.
My subordinates are on the team	Records where any of your reports are on the team.
My subordinates own	Records where any of your reports are listed as owners.
My territory	Records within sales territories you own or are listed as a member.
My territory hierarchy	Records within your sales territories and any child territories.

#### Related Topics

- [What happens when I search for Activities owned by my subordinates?](#)

## Find an Item in the List of Search Results

If you don't see what you're looking for on the page and the list generated by the selected saved search is too long, then you can enter one or more search terms in the Search box and press Enter on your keyboard.

You can enter a combination of search terms. For example, if you're searching for an account, you might want to search on the account name, the street address, and the name of the primary contact, and so on. What attributes you can search is specified by the application administrator. All search terms returned are highlighted in bold font in the search results. Your results display records matching the search terms in any of the fields enabled for search. For example, searching accounts using the term Pinnacle, returns both accounts with Pinnacle in the name and accounts on Pinnacle Street, unless the application administrator disables the address search.

### Tips for Using the Search Box

Here are some tips and guidelines for how best to use the search in Workspace.

- Use the enhanced autocomplete feature in the Workspace search box to help you add and apply filters to the results. Autocomplete reduces the number of clicks and let you filter results without opening the Show Filters pane. For example, as you begin to type "Prim" you'll see "Primary Industry" as one of the suggestions (Primary Industry is an attribute of accounts). Select an attribute to show possible values in a drop-down list. You can choose one of the possible values to filter the accounts based on that primary industry.



- If you're searching for an item with multiple words in the name, you can enter any of the words. For example, a search for `Ange1` retrieves matches for the account names "Vitamin Angels", "Los Angeles Rubber", and "Angeles Warehouse".
- Workspace search also matches your entry with similarly spelled words. Search results based on such fuzzy matches are rendered below exact matches. The most relevant items are always displayed first. The fuzzy match settings can be changed during setup. By default, the application displays spellings that are one letter off if the first three letters of the word match exactly. A keyword search on the term `cernar`, for example, might return "Cerner" or "Cernas" in the search results. It won't return "Cesner", "Carner", or "Kerner".
- Searching is case insensitive for the keyword **Search** box. Let's say you enter the words `Pinnacle Of pinnacle`, then Workspace returns the same results.

**Note:** However, if you enter a search term with all capitalized letters, that search term is changed to Camel Case in the search results returned. For example, if you enter `RED WOOD`, then Workspace returns records containing `Redwood Shores`.

- Enter entire words or numbers you're searching for.

For example, entering the word `pin` when searching for accounts, returns Pin Point Needlework Inc. and Oracle on 100 Pin Road.

- You can enter multiple search terms separated by spaces.

Spaces between words act as implicit + (plus symbol) operators. For example, entering `Pinnacle Corporation` finds all the accounts with those two words in the name, including Pinnacle Savings Corporation, Pinnacle Distribution Corporation, and Pinnacle Corporation.

- Put multiple search terms in quotes to narrow down your search.

For example, entering `"Pinnacle Corporation"` returns only Pinnacle Corporation, and any other records with those two terms in that specific order.

- Use the preferred operators + (plus symbol), | (pipe symbol) and - (minus symbol) in place of the boolean operators AND, OR and NOT respectively. For example, entering `+ oracle -"Redwood"` returns Oracle locations not in Redwood city.

**Note:** If you don't specify any operator and use a space, then it's considered as an implicit AND and there's no need to add the + sign. For example, entering `"oracle Redwood"` will get back results having both Oracle and Redwood keywords in them. So `Oracle Redwood` will give the same results as `"Oracle + Redwood"`

- Use the | (pipe symbol) operator to search on multiple terms.

For example, entering `chicago | Pittsburgh`, finds accounts in both of these cities and accounts with those terms in the name.

- Use the - (minus symbol) operator to narrow down your search.

For example, entering `oracle - sunnyvale` when searching for accounts, returns Oracle locations excluding those in Sunnyvale.

When you use - (minus symbol) followed by two or more words you must enclose the words in double quotes (" "). For example, entering `oracle - "San Francisco"` when searching for accounts, returns Oracle locations excluding those in San Francisco. If you exclude the double quotes, then searches would return Oracle locations in areas beginning with San such as San Jose, San Diego and so on.

- Capitalization doesn't matter on search terms.

- Use the star (\*) symbol to indicate missing characters or partial words. This symbol can be used at the beginning, end or middle of a word to be searched.  
  
For example, entering \*tion as your search term returns Presentation. If you enter Present\*, records with Present, Presentation, and Presents are returned. Finally, if you enter the star symbol in the middle of a word such as Pr\*tion, records with the terms Presentation and Production are returned.
- Use the question mark (?) to match exactly one character. This wildcard can be used at the beginning, end or middle of a word to be searched.

For example, entering Pri?e returns the following results: - Price - Prize.

## View Search Results Grouped By Fields

You can display search results in groups based on the specific fields on the object or related objects. View an overview of the number of records in each Grouped By grouping and search and filter records within these groupings.

You can also view aggregates such as count, average, minimum, maximum, and sum of values on the records of each group. Count aggregations are available on each group by default.

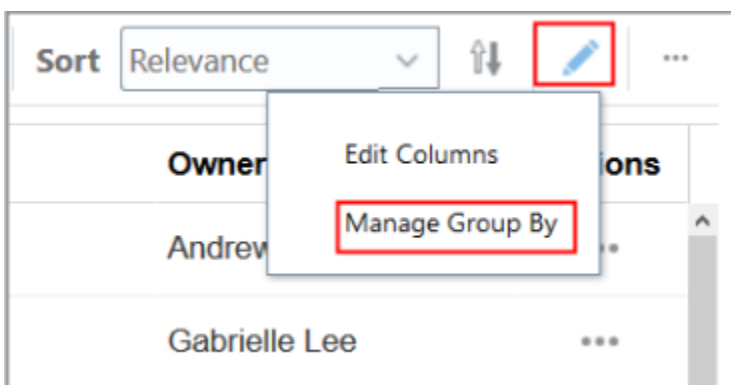
For example, you can view opportunities arranged into groups for various stages of the pipeline. In addition, you can view data aggregates for each group, such as grouping opportunities by month and viewing the total revenue for each month. You can sort the groups alphabetically or by the results count for each group based on text fields. You can also have one custom aggregation based on numeric fields on the object and can save your Group By lists as a saved search.

Your administrator must set the **Enable Group By in Workspace** parameter from the **Parameters** tab in the **Configure Adaptive Search** page so that you can avail of this feature. Once the parameter is enabled, you can view data with common characteristics in a more understandable and relevant way.

### Access the Manage Group By Feature

Here's how to access the group by feature to manage your records.

Click **Manage Group By** (the pencil icon on the right of the Workspace UI page highlighted in the screenshot. You can also change which columns are displayed on the page by selecting the **Edit Column** item.



### Use Group By to Manage Your Object Records

Here's how to use the group by feature to manage your records from the Workspace UI.

1. Click the pencil icon on the top right and select **Manage Group By**.

2. Enter the following details in the Manage Group By page:

- Group By: Select from the list of fields that you can use to Group the results. This list is defined by your administrator.
- Groups: Select from the list which groups should be used for Group By.

**Note:** If you select a numeric field for Group By, then, there's no choice and the groupings are based on the filter groups defined in the Configure Adaptive Search setup.

- In the **Define Aggregation** section, from the list in the Aggregate Field, select the field for which the aggregation will be applied. Only numeric data types fields are shown here.
- Aggregate Function: Select from a list of operators such as Sum, Average, Minimum and Maximum. When you click **Apply**, the field displays a concatenated label with operator and field name.

3. Click **Apply** or **Apply and Close** when you're finished updating your groups and aggregations.

**Note:** When you create a Group By view of your search records, you can save as a private saved search.

When you first perform a record search using Group By, the initial search displays a maximum of 6 groups. You can use the **Show More** link (callout 3) to display the next 6 groups as in this sample screenshot. Also shown is an example of the aggregation of the sum of the number of emails sent to your contacts callout 2 in a specific city group (callout 1).

Contacts: All Contacts

Grouped By Primary Address: City Sort Relevance

Results 1,775 Total Number of Emails Sent 119

Name	Primary Email	Primary Address	Owner	Actions
SalesContact20170227_211				...
Auto1be30942953 Smith				...
Auto86931002005 Smith				...
Auto61231036957 Smith				...
Accountant Smith				...
Director Smith				...
BIQA_Loyalty Atul				...
Peter Wise	sendmail-test-discard@			...

Show More | - 10 of 1,775 Results

	Results	Total Number of Emails Sent
▶ Sunnyvale	49	0
▶ Redwood Shores	36	0
▶ San Mateo	19	3
▶ Holtville	11	0
▶ Redwood City	10	17

You can group date fields by:

- Filter Groups - Those groups defined for filters in the Configure Adaptive Search setup
- By Month

For example, if you filter search records using Group By on a date field such as Creation Date, you can select **By Month** to group your data into monthly intervals. You can view data beyond 6 months by simply clicking Show More. This provides a more complete view of data divided by months.

If you choose to group your object records by a date type field such as Close Date, then the following filters are available:

- This Quarter
- Next Quarter
- This Year
- Last Quarter
- Last Year

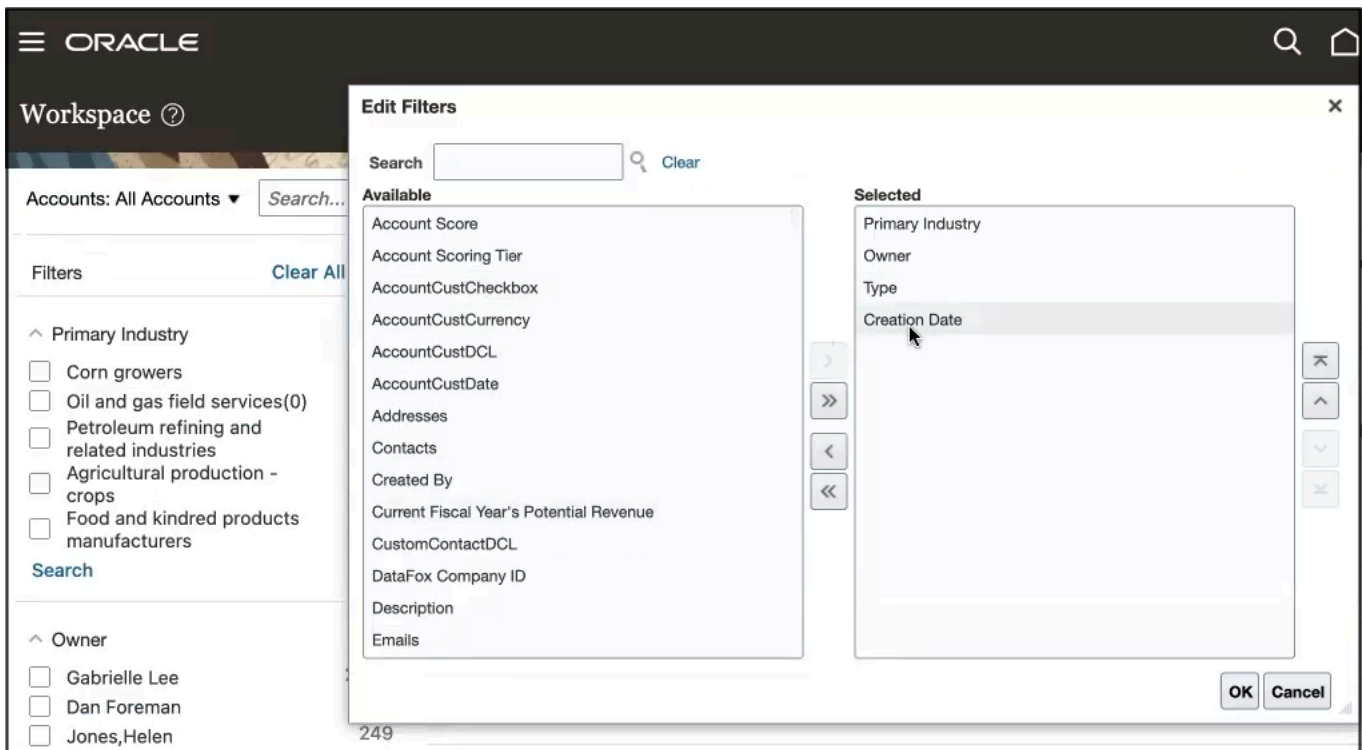
## Filter Records by Date and Time in Workspace and Work Areas Powered by Adaptive Search

You can now select both date and time filters on specific date and time fields to narrow down your list of search results. This saves you time because you can conduct more focused searches.

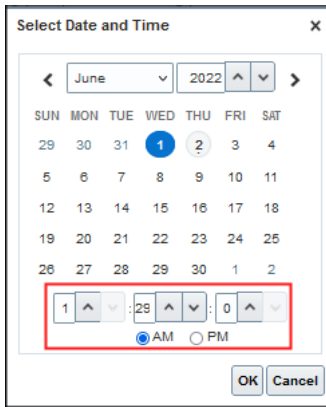
Previously, you could only specify a date while filtering records from a date field. For example, if you added the Creation Date field as a search filter, all records within the specific From and To date pickers were returned. You can now specify a specific time filter as part of your date search filter which helps to further refine your list of returned records.

Here's an example of how to filter account records by date and time in Workspace or work areas powered by Adaptive Search.

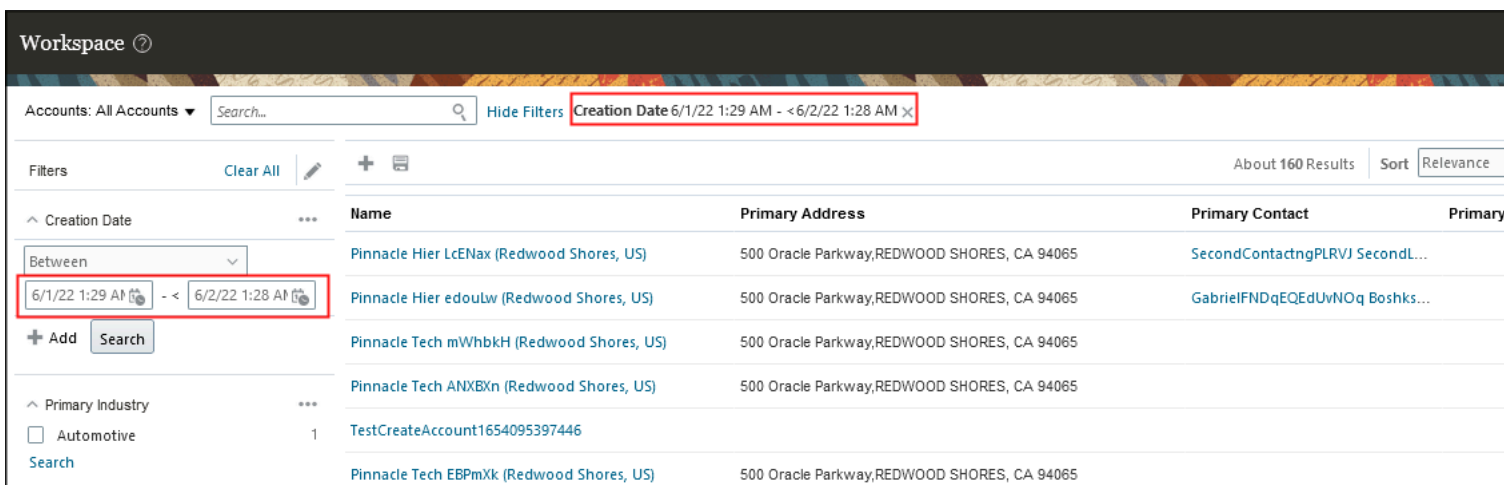
1. From Workspace or a work area powered by Adaptive Search, select the object you want to search such as Accounts.
2. Click Show Filters and select Creation Date from the list of available filters and move it to the selected pane as shown.



3. Edit the Creation Date filter and enter the date and time on the Select Date and Time panel as shown.



4. Click **Search** to narrow your search results of accounts based on the creation date and time filter you specified.



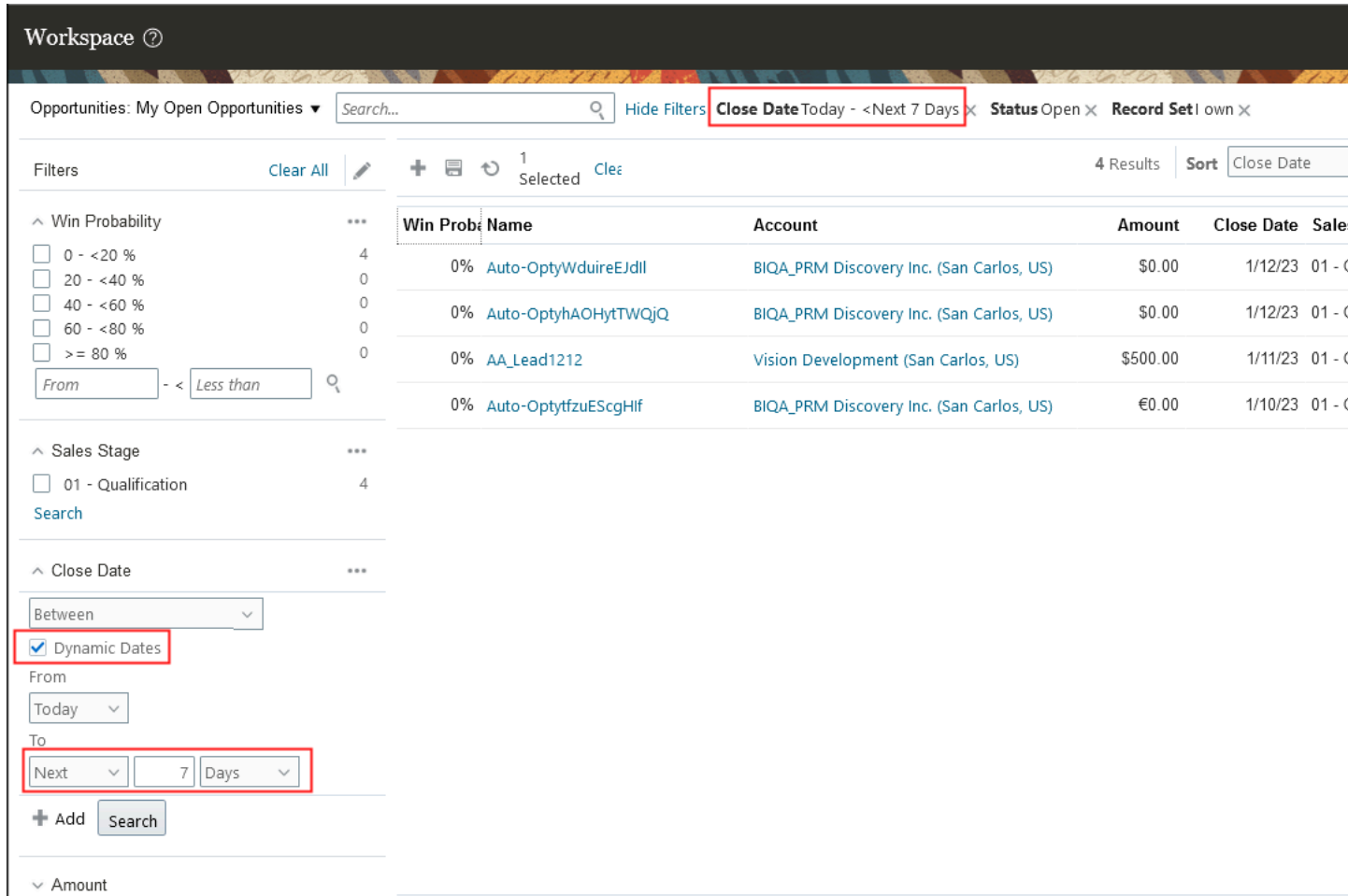
## Use Dynamic Dates in Workspace Date Filters

You can add date filters using dynamic dates in Workspace. For example, you can add a filter on opportunities where the close date is due in the next 7 days. This helps in creating more useful saved searches based on rolling dates.

Here's an example of how to filter opportunity records by close date using dynamic dates in Workspace or work areas powered by Adaptive Search.

1. From Workspace or a work area powered by Adaptive Search, select the object you want to search such as My Open Opportunities.
2. Click Show Filters and select Close Date from the list of available filters.
3. Click Advanced from the More button (three horizontal dots).

- 4. Select Dynamic Dates as shown in the sample screenshot and select the dates to search where the close date for the opportunity is due in the next 7 days.



**Note:** If you want to search using a date and time field, such as Last Update Date, then you can also select hours as a filter along with days, weeks, and months.

## Saved Searches

### Saved Searches

When you open Workspace or navigate to a work area, the page displays the list of items generated by the default saved search. They contain predefined search criteria that display useful lists for you as soon as you select them.

Selecting My Appointments, for example, shows you a list of your current appointments, selecting My Overdue Tasks lists all of your overdue tasks, and so on. Saved searches are provided by Oracle, by your administrator, and you can create them yourself by saving any search in Workspace.

The predefined saved searches provided by Oracle follow a naming convention:

- To view a list of items you own, select saved searches starting with the word "My". For example, My Appointments displays the list of the appointments you created. My Accounts displays a list of accounts where you're listed as the owner. You're an owner of the account if you created the account record or if you're assigned ownership by an administrator.
- To view a list of the broadest range of items, select the saved search that starts with the word "All". For example, selecting All Accounts searches all the accounts you can view.

When you select a saved search, the search results display on the page. You can see the approximate number of items in each saved search, and you can control how the items are sorted.

## Save Your Search to Create a New Saved Search

Saving your current search criteria and your preferred way displaying the results is as simple as clicking Save As on the landing page. Your saved search saves whatever you added to your search, including keywords, filters, columns, and sort order of the results.

1. Click **Save As** on the landing page.
2. In the Create Saved Search dialog box, enter the name for your saved search. Your saved searches are listed in alphabetic order.
3. If you're an administrator, you can share the saved search you're creating. There are three options:
  - Only Me
  - Everyone
  - Specific Roles

If you select **Specific Roles**, click **Search** (the people icon) and select the job roles.

4. Click **Create**.
5. Your saved search appears on the page.

## Create Saved Searches in Workspace

You can save any search you perform in Workspace as a new saved search and you can manage the saved searches available to you.

Your application administrator determines which saved search you see by default when you open Workspace and which saved searches are available for each business object, but you can override these settings with your own personal preferences. A saved search includes all of the search terms you enter and all of your preferences, including the columns that display for your search results.

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.

Users of Actionable Infolets can include saved searches created in Workspace as filters to quickly access relevant records. To access a different set of data, they can create a new saved search in Workspace and then expose the relevant saved search in the Actionable Infolets UI. This gives them a more targeted view of the records that they want to update and take immediate action on.



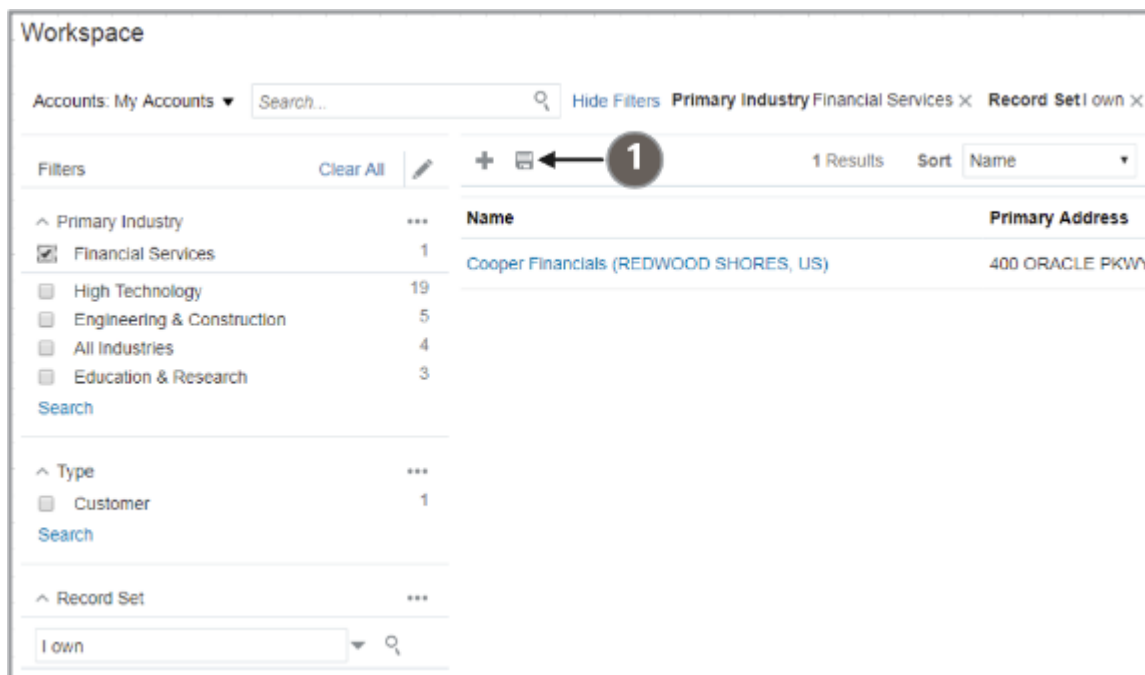
**Note:** By entering precise search criteria for your saved search, you can greatly decrease the number of records returned and decrease the load time.

## Create Saved Searches

Here's how to create a saved search:

1. 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. The My Accounts saved search restricts your saved search to the accounts you own.
2. Enter your search terms. You can enter search terms in the **Search** box, use filters, or both.
3. You can add or change the columns displayed in the search results. See the *Change Columns Displayed in Search Results* topic for details.
4. Click **Save As**.

Here's a screenshot of Workspace highlighting the location of the Save icon (callout 1).



The Create Saved Search window appears.

5. Enter the name of your saved search.

6. Optionally, select **Set as my default saved search** to make the saved search your personal default whenever you navigate to Workspace.
7. Click **Create**.

## Maintain Your Personal List of Saved Searches

While each business object has its own list of saved searches, you can designate only one saved search as your personal default.

This is the saved search that you see each time you open Workspace or the appropriate work area. Each business object comes with its own saved searches, which you can manage as described in the following steps.

The next section is for non-administrative users only. Only administrators can assign saved searches to different roles and assign default saved searches to different user roles. For more information, see the Saved Search Setup section in the Implementation Reference guide

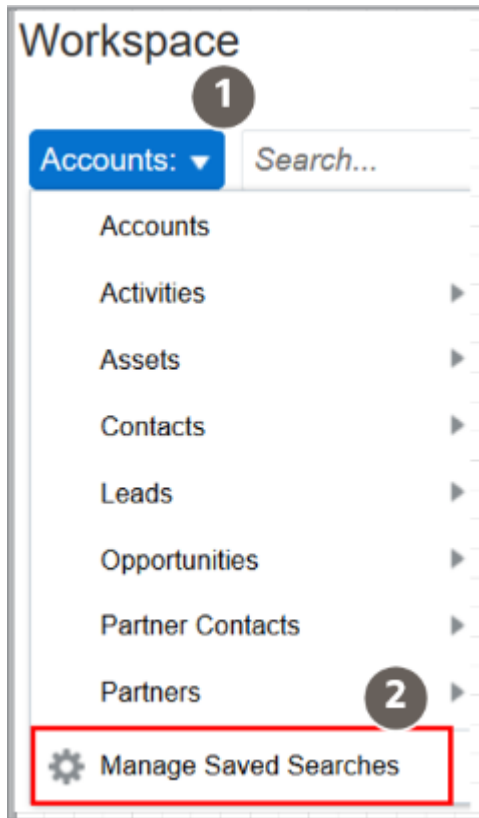
### Manage Your Personal List of Saved Searches

From the Workspace UI selector:

1. Select the business object.

2. From the same menu select **Manage Saved Searches**.

Here's a screenshot of the list of business objects that appears when you click the selector. The image highlights the Manage Saved Searches task, the last selection on the list.

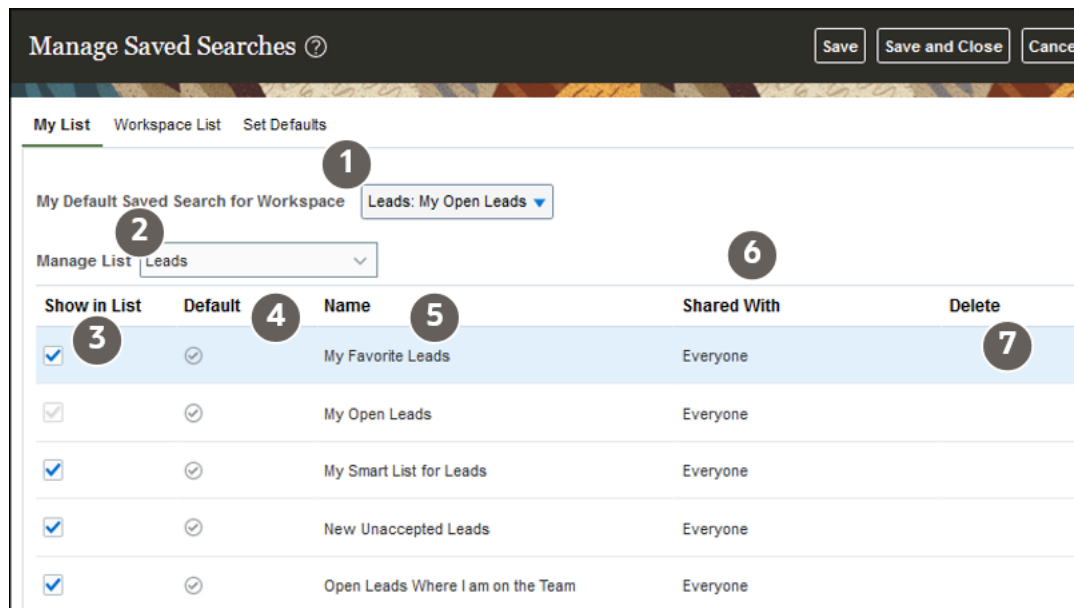


The following screenshot shows an example of the Manage Saved Searches window as seen by users. Here's a table that describes the columns highlighted in the screenshot by callouts.

Callout Number	Column Name	Description
1	My Default Saved Search for Workspace	This is your personal default saved search. You 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 are displayed. You can quickly switch between saved searches across objects. Once a new object is selected, saved searches related to that object are immediately displayed.

Callout Number	Column Name	Description
3	Show in List	The saved search appears in the list of saved searches only when this option is selected. While you can't delete lists provided by Oracle, you can hide them by deselecting the Show in List option.
4	Default	Each salesperson can specify one saved search for each object as their personal default. You see the results of your personal default saved search when you open work areas powered by Adaptive Saved search, including those in CX Sales Mobile in the Redwood User Experience. The personal default saved searches don't apply to the Workspace work area, as Workspace always opens to the default saved search you select in the My Default Saved Search for Workspace field.
5	Name	You can rename your own personal saved searches here. However you can't rename other saved searches, such as those created or assigned by an administrator.
6	Shared With	You can view but can't change the values here.
7	Delete	You can only delete your own personal saved searches. You can't delete saved searched provided by Oracle or an administrator.

Callout Number	Column Name	Description



3. Update the saved searches. You can:
  - o Rename personal saved searches you created
  - o Hide save searches from your personal list, by deselecting **Show in List**.
4. Click **Save and Close** when you're done.

## How to Display the Most Relevant Records for My Mobile App

Saved searches are predefined for Workspace users. Now, in addition, administrators 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, too.

This feature helps to display the most relevant records in their mobile app with a single tap on the menu. Sales administrators can create saved searches for the whole sales organization and for specific sales roles for mobile app users. A default saved search is the saved search that's automatically displayed when you first accesses Workspace from your mobile app. 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.

**Note:** Mobile app users can select the save searches they want from the **Default for Mobile** column.

## Display a List of Your Most Recent and Frequently-Accessed Items

You can display a list of the most relevant items by selecting a My List search.

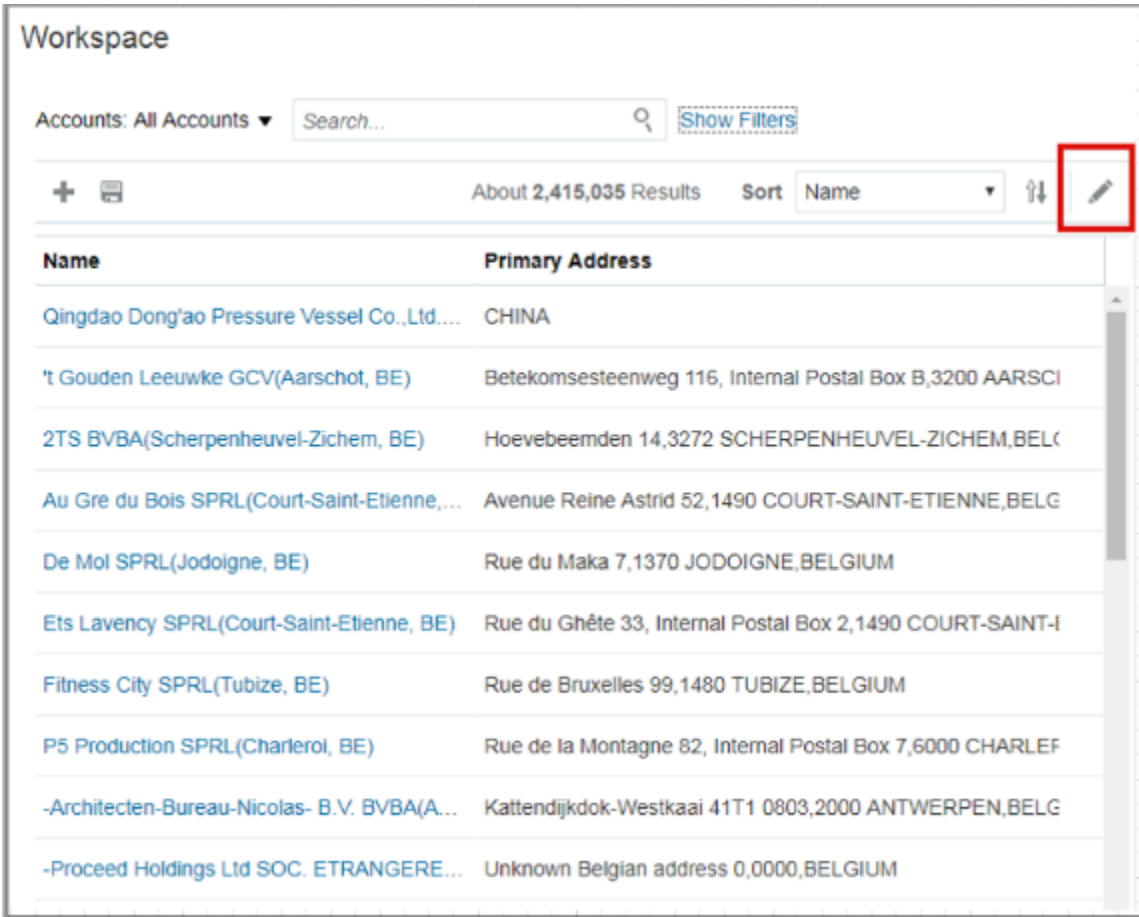
The application automatically tracks your user context and activities and generates a list for each object, My List for Accounts, My List for Leads, and so on. When you click on one of these saved searches, you see the most relevant results based on your object activity and context.

## Use Workspace and Work Areas Search

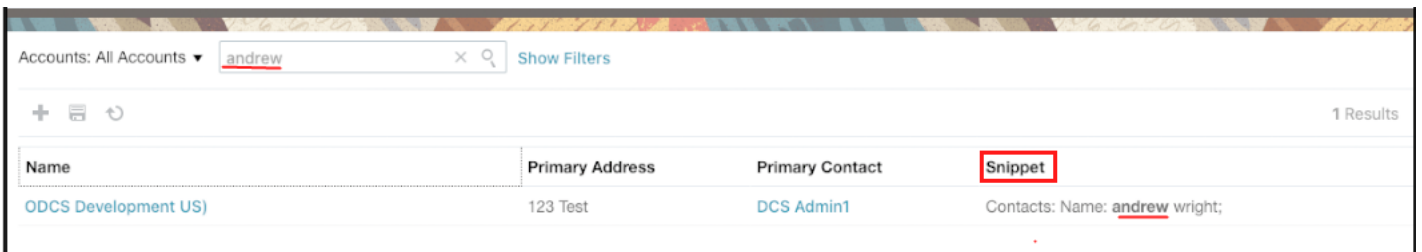
### Change Columns Displayed in Search Results

You can change which columns are displayed on the page and in what order by clicking Edit Column (the pencil icon). You can also change the width of the columns by dragging their sides.

Your preferences can be saved as part of a saved search. This screenshot highlights the location of the Edit Column icon.



You can add the **Snippet** field to display keyword information of the search results displayed in Workspace. For example, when you do a keyword search, the Snippet field highlights the part of the record that matches the keyword as shown in this example.



## Find the Most Recent Items You Worked On

The application remembers the last ten items you worked on for each of your work categories and displays a list as soon as you put your cursor in the Search box.

For example, to get to the last account you worked on, simply select Accounts, place your cursor in the search box, and click the account name in the list.

## Update Multiple Records at the Same Time

You can update multiple fields in multiple records at the same time in Workspace and in individual work areas that use the same Workspace features.



For example, you can update the sales stage on multiple opportunities at the same time with just a few clicks. Or update rank and deal size on several leads at once.

**Note:** Your administrator must enable both the mass update and the mass actions Adaptive Search parameters for this feature to work. In addition, they must also use the **Configure UI** tab from the Configure Adaptive Search page to specify which fields to enable for mass update. They must select the **Mass Update** check box and have at least four fields selected for both standard and custom objects.

You can also mass update additional fields on multiple records. These additional fields include choice list fields based on objects that aren't available in Adaptive Search. This makes the mass update feature more usable and complete.

1. Highlight the records that you want to update.  
Use the standard ways of selecting items: press the **CTRL** key to select individual records. Press and hold the **Shift** key to select a range.
2. Right-click on the mouse and select **Update** from the list.
3. On the Update page, select the fields you want to update and enter the new values.
4. Click **Update**.
5. Confirm your action in the dialog box.

## Take Actions on Search Results

You can create records and take actions on one or more items on the page.

- Create records in Workspace and work areas powered by Adaptive Search by clicking **Create**.
- Drill down and edit the records on the page.
- Drill directly down into a record, such as an opportunity or account using a deep link. Since deep links are also exposed in other applications, such as Business Intelligence, you get quick access to open and view such records.
- Take different actions on the records without drilling down on them, by clicking **Actions** (represented by the three dot icon in the Actions column).

The available actions vary by business object. For example, for accounts you can create an appointment, create an opportunity, create a note, create a task, and log a call.

**Note:** Not all objects allow for the creation of records or actions in Workspace. For example, Territories can only be created in the context of a parent territory so it isn't possible to create a territory from within the Workspace UI. You must first edit a territory and then create a child territory.



**Note:** Any changes or actions you take are processed as part of near real time and are reflected in a couple of seconds. If an action is performed on a set of records, you may have a longer time lag before you see the updated records in Workspace or in your work areas powered by Adaptive Search.

## List of Predefined Actions and Saved Searches

Most of the objects come with predefined actions. 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 select contacts or leads from your Workspace saved searches and add them as campaign members to Oracle Eloqua marketing campaigns through the **Add to Campaign** action. After the added contacts and leads are synchronized to Oracle Eloqua, they get added to the specified Oracle Eloqua marketing campaigns.

Here are the predefined actions that you can take for each of the objects

Business Object	Predefined Saved Search	Actions	Multi-record Actions
Account	<ul style="list-style-type: none"> <li>All Accounts</li> <li>My Accounts</li> <li>My Favorite Accounts</li> <li>My List for Accounts</li> <li>My Teams Account</li> </ul> <p>Specific for Sales Manager and Sales VP roles.</p>	<ul style="list-style-type: none"> <li>Create Appointment</li> <li>Create Service Request</li> <li>Create Opportunity</li> <li>Create Note</li> <li>Create Task</li> <li>Delete Account</li> <li>Log a Call</li> <li>Update</li> </ul>	<ul style="list-style-type: none"> <li>Update</li> <li>Merge</li> </ul>
Activity	<ul style="list-style-type: none"> <li>My Appointments</li> <li>My Call Reports</li> <li>My Calls to Log</li> <li>My Open Tasks</li> <li>My Overdue Tasks</li> <li>My Team's Task</li> </ul> <p>Specific for Sales Manager, Sales VP, and Partner Sales Manager roles.</p>	<ul style="list-style-type: none"> <li>Mark Complete</li> <li>Delete Appointment</li> <li>Create Follow-Up Task</li> <li>Decline Call Report Creation</li> <li>Create Follow-Up Appointment</li> <li>Delete Task</li> <li>Create Note</li> <li>Create Call Report</li> <li>Update</li> </ul>	<ul style="list-style-type: none"> <li>Delete Appointment</li> <li>Decline Call Report Creation</li> <li>Delete Task</li> <li>Mark Complete</li> <li>Create Follow-Up Task</li> <li>Create Follow-Up Appointment</li> <li>Create Note</li> <li>Create Call Report</li> <li>Update</li> </ul>
Asset	<ul style="list-style-type: none"> <li>All Active Assets</li> <li>My Customers' Active Assets</li> <li>My Customers' Potential Renewal Assets</li> </ul> <p>Specific for Sales, Channel, and Partner roles.</p>	<ul style="list-style-type: none"> <li>Log a Call</li> <li>Create Appointment</li> <li>Create Task</li> <li>Update</li> </ul>	Update
Campaign	<ul style="list-style-type: none"> <li>Active Campaigns</li> <li>All Campaigns</li> </ul>	<ul style="list-style-type: none"> <li>Add Contacts</li> <li>Add Leads</li> </ul>	Update

Business Object	Predefined Saved Search	Actions	Multi-record Actions
	<ul style="list-style-type: none"> <li>Planned Campaigns</li> </ul>	<ul style="list-style-type: none"> <li>Update</li> </ul>	
Contact	<ul style="list-style-type: none"> <li>All Contacts</li> <li>My Business Contacts</li> <li>My Contacts</li> <li>My Favorite Contacts</li> <li>My List for Contacts</li> </ul>	<ul style="list-style-type: none"> <li>Create Note</li> <li>Create Task</li> <li>Add to Campaign</li> <li>Create Opportunity</li> <li>Log a Call</li> <li>Create Appointment</li> <li>Create Service Request</li> <li>Delete Contact</li> <li>Update</li> </ul>	<ul style="list-style-type: none"> <li>Update</li> <li>Merge</li> </ul>
Deal Registration	<ul style="list-style-type: none"> <li>All Deal Registrations</li> <li>All Deal Registrations Expiring Soon</li> <li>All Deal Registrations Where I am on the Team</li> <li>All Pending Deal Registrations</li> <li>All Returned Deal Registrations</li> <li>Deal Registrations Owned By Me</li> </ul>	<ul style="list-style-type: none"> <li>Create Appointment</li> <li>Create Note</li> <li>Create Task</li> <li>Log a Call</li> <li>Update</li> </ul>	Update
Lead	<ul style="list-style-type: none"> <li>My Favorite Leads</li> <li>My Open Leads</li> <li>My List for Leads</li> <li>Open Leads Where I am on the Team</li> <li>My Team's Open Leads</li> </ul> <p>Specific for Sales Manager and Sales VP roles.</p>	<ul style="list-style-type: none"> <li>Accept</li> <li>Assign Partner</li> <li>Create Call Report</li> <li>Create Note</li> <li>Add to Campaign</li> <li>Delete</li> <li>Reject</li> <li>Score</li> <li>Create Task</li> <li>Retire</li> <li>Qualify</li> <li>Create Appointment</li> <li>Convert</li> <li>Rank</li> <li>Run Assignment</li> <li>Log a Call</li> <li>Update</li> </ul>	<ul style="list-style-type: none"> <li>Accept</li> <li>Delete</li> <li>Qualify</li> <li>Unqualify</li> <li>Rank</li> <li>Run Assignment</li> <li>Score</li> <li>Update</li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>My Favorite Opportunities</li> </ul>	<ul style="list-style-type: none"> <li>Log a Call</li> </ul>	<ul style="list-style-type: none"> <li>Delete</li> </ul>

Business Object	Predefined Saved Search	Actions	Multi-record Actions
	<ul style="list-style-type: none"> <li>• My Open Opportunities</li> <li>• My List for Opportunities</li> <li>• Open Opportunities Where I am on the Team</li> <li>• My Team's Opportunities</li> </ul> <p>Specific for Sales Manager, Sales VP, and Partner Sales Manager roles.</p>	<ul style="list-style-type: none"> <li>• Create Appointment</li> <li>• Save and Run Assignment</li> <li>• Create Task</li> <li>• Create Note</li> <li>• Copy Opportunity</li> <li>• Delete</li> <li>• Update</li> </ul>	<ul style="list-style-type: none"> <li>• Update</li> </ul>
Partner	<ul style="list-style-type: none"> <li>• All Partners</li> </ul> <p>Specific for Channel Account Manager, Channel Operations Manager, Channel Sales Manager, and Partner Administrator roles.</p> <ul style="list-style-type: none"> <li>• My Partners</li> </ul> <p>Specific for Channel Account Manager, Channel Operations Manager, and Channel Sales Manager roles.</p> <ul style="list-style-type: none"> <li>• My List for Partners</li> </ul> <p>Specific for Channel Account Manager, Channel Operations Manager, and Channel Sales Manager roles.</p> <ul style="list-style-type: none"> <li>• My Team's Partners</li> </ul> <p>Specific for Channel Operations Manager, and Channel Sales Manager roles.</p>	<ul style="list-style-type: none"> <li>• Create Appointment</li> <li>• Create Note</li> <li>• Create Task</li> <li>• Log a Call</li> <li>• Update</li> </ul>	Update
Partner Contact	<ul style="list-style-type: none"> <li>• All Partner Contacts</li> </ul> <p>Specific for Channel Account Manager, Channel Operations Manager, Channel Sales Manager, and Partner Administrator roles.</p> <ul style="list-style-type: none"> <li>• My Partner Contacts</li> </ul> <p>Specific for Channel Account Manager, Channel Operations Manager, and Channel Sales Manager roles.</p>	Create Contact	None
Quotes and Orders	<ul style="list-style-type: none"> <li>• All Active Quotes</li> <li>• All Expired Quotes</li> <li>• My Active Quotes</li> <li>• My Expired Quotes</li> </ul>	<ul style="list-style-type: none"> <li>• Log a Call</li> <li>• Create Appointment</li> <li>• Create Task</li> <li>• Create Note</li> </ul>	None

Business Object	Predefined Saved Search	Actions	Multi-record Actions
Quote and Order Line	<ul style="list-style-type: none"> <li>All Active Quote Lines</li> <li>All Quote Lines</li> <li>My Active Quote Lines</li> </ul>	None	None
Revenue Lines	<ul style="list-style-type: none"> <li>All Open Revenue Lines</li> <li>My Open Revenue Lines</li> <li>Revenue Lines on Open Opportunities I Own</li> </ul>	None	None
Service Requests	<ul style="list-style-type: none"> <li>All Open Service Requests</li> <li>My Open Service Requests</li> <li>Open Service Requests Created by Me</li> <li>Open Service Requests Not Assigned to a Queue</li> <li>Open Service Requests Where I Am on the Team</li> <li>Unassigned Open Service Requests in My Queue</li> </ul>	<ul style="list-style-type: none"> <li>Delete</li> <li>Update</li> </ul>	Update
Territory	All Territories	None	Update

*Related Topics*

- [Update Multiple Records at the Same Time](#)
- [Overview of Smart Actions](#)
- [Manage Workspace Smart Actions](#)

## How do I use dynamic and nested dynamic tabs?

If you have the required privileges and role, then you can use dynamic and nested tabs to quickly and easily navigate across and between grouped records without losing context. Under each open top-level dynamic tab, you can open objects as nested tabs.

To open an associated record as a nested tab, click the object link. When you open a record in a nested tab, that record automatically becomes the active tab. You can manage objects such as Service Requests, Accounts, Contacts, Assets, Activities, Leads, Opportunities, Campaigns, Territories, and Custom Objects, with each supporting nested dynamic tabs.

**Note:** You can only use dynamic tabs in Workspace. Dynamic tabs are not supported in the individual work areas.

The dynamic tab and nested dynamic tab feature is already predefined for users with job roles such as Customer Service Representative and Customer Service Manager job roles. Other users who want to open objects in dynamic and nested dynamic tabs must request their administrator to grant them a custom role with the required privileges assigned.

For example, the Service Request object enables service users to interact with multiple records simultaneously through top-level dynamic tabs to save time accessing related information about a service interaction. The primary tabs display instances of objects such as SRs, Queues, Contacts, and Accounts. Other workspace objects not listed, such as Partner Accounts and Partner Contacts, open as modal windows.

## Work with Dynamic Tabs and Nested Dynamic Tabs

When you have an open record and then open another record associated with the initial record, the record is shown as a nested tab of the primary record. For example, open an Account record as a top-level dynamic tab. Drill into other linked objects associated with that Account, such as the Primary Contact or Service Request. These objects open in a nested dynamic tab. The maximum number of dynamic tabs that you can open at one time is 10.

You can use the nested dynamic tabs to manage multiple related objects without confusion. The nested tabs enable better support for multiple interaction agents such as chat agents, and help increase agent productivity. The maximum number of nested tabs that you can open at one time is 5.

The nested dynamic tabs contain these buttons:

- **Save:** Saves any data changes and remain on the same page.
- **Save and Close:** Saves any data changes and closes the tab. This button displays on the first nested tab only if there are no other nested tabs opened. As soon as another nested tab is opened, this button is hidden.
- **Cancel:** Discards any data changes and closes the tab. You're notified if there are unsaved changes.

You can close the top-level dynamic tab and all the nested tabs at one time by clicking the X icon on the top-level dynamic tab name. If you have unsaved changes in a nested tab and move away from the tab, a blue dot appears next to the tab label. A message also appears when you hover over the label to indicate the unsaved status. When you try to close a dynamic tab with unsaved changes in its nested tabs, a warning message appears.

**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.

## FAQs for Workspace and Work Areas Search

### Frequently Asked Questions (FAQs) for Workspace and Work Area Search

This section contains some frequently asked questions (FAQs) for Workspace and Work Area search. Scroll or search to find answers to common questions.

## Can I navigate to work areas powered by Adaptive Search from my Sales springboard?

Yes, depending on your privileges, you can navigate directly to new work areas powered by Adaptive Search. The new work areas provide enhanced search and other features of Workspace for accounts, contacts, activities, leads, opportunities, and other objects.

Using the grid of icons on the springboard, click the sales feature icon to open a work area powered by Adaptive Search for the specific sales object selected.

Your sales administrator must have set the opt-in **Open Work Areas Powered by Adaptive Search** feature to Yes. In addition, the object you select from the springboard must be indexed and the **Display Object in Workspace** check box must be selected from the Configure UI tab in the Configure Adaptive Search page.

**Note:** Use the Workspace icon to access service requests because the Service Request object is currently not supported by this direct access feature. Also, the dynamic tabs feature isn't available for those objects that you select directly from the springboard or navigator.

### *Related Topics*

- [How do I switch to Work Areas powered by Adaptive Search](#)
- [What are the Adaptive Search setup UI components?](#)

## Why can't I find the information I just entered in Workspace and Work Area search?

Workspace and work area search requires a few moments to index new information for it to become searchable. If you search for information just entered and don't find it, wait a few moments and try again.

For example, after you perform a successful lead to opportunity conversion, you may notice that the lead still displays a status of Unqualified. If you wait a few moments for the indexing to complete and refresh the list, the record status changes to Converted.

## Why can't I see the tabs from the Manage Saved Searches UI?

To perform role-based administration in Workspace, including assigning saved searches to roles, and assigning a default saved search to roles, you must have access to the My List, Workspace List, and Default by Role tabs in the Manage Saved Searches box.

You must have the ZCA\_MANAGE\_INTERACTIVE\_LISTS\_SAVED\_SEARCH privilege assigned to your role to see these tabs. Otherwise you will see a single window in Manage Saved Searches enabling you to manage your personal saved searches only.

Let's say you have the Channel Operations Manager role. These tabs enable you to assign saved searches from the Partner and Partner Contact objects to Partner and Channel user roles. Without the privilege added to your role, you're limited to managing only personal saved searches.

The ZCA\_MANAGE\_INTERACTIVE\_LISTS\_SAVED\_SEARCH privilege can be assigned to any user role who should have administrative access to the Manage Saved Searches UI.

## Why does the Default Saved Search field display with either no name or with a Select drop-down list?

If you don't have permission to view the object associated with the default saved search references, then the Default Saved Search field in the Manage Saved Searches Defaults by Role window is either empty or contains the word "Select".

Let's say you don't have permission to view the Partner object. A role name such as Channel Account Manager, who has a Partner default saved search assigned to that role, will not display in the **Default Saved Search** field. In addition, saved searches that you don't have permission to access do not appear in the Default Saved Search drop-down list.

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.

## What can I do if I get too many results when searching for an account by name?

Workspace is designed to permit broad searches. If you're getting too many irrelevant results, then add filters. To display only the matching account names, add the Name field as a filter and enter your search term there.

## What happens when I search for Activities owned by my subordinates?

Workspace search returns both your activities and your subordinate activities. However, in the Activity simplified UI, only your subordinate activities are returned. This is unique for the Activities object.

Searches for all other objects returns both your and your subordinate records in the Workspace search UI and in the specific object's UI.

This image shows the search results (callout 2) based on the record set (callout 1). Matt Hooper has logged in and he can see the activities that he owns when Record set is "My subordinates own"

Activities: My Appointments Search... Hide Filters Owner Matt Hooper Record Set My subordinates own

Filters Clear All + 79 Results Sort Date

	Date	Location	Type	Account	Owner
▼ Date	4/21/21	6:00 AM	Meeting	TCM Customer US)	Matt Hooper
▼ Type	4/21/21	6:00 AM	Meeting	TCM Customer US)	Matt Hooper
▼ Account	4/23/21	12:00 AM		TCM Customer US)	Matt Hooper
▼ Activity	4/26/21	7:00 AM	Meeting	BIQA B2C Communications US)	Matt Hooper
^ Owner	1/4/22	10:30 AM	Meeting		Matt Hooper
<input checked="" type="checkbox"/> Matt Hooper 79	1/4/22	6:30 PM	Meeting		Matt Hooper
Search	1/4/22	6:31 PM	Meeting		Matt Hooper
^ Record Set	1/4/22	6:32 PM	Meeting		Matt Hooper
My subordinates own					

To get around this and to keep the Activities object search results consistent in both UI's, exclude the Owner name in Workspace (callout 2) using the advanced search feature on the Owner filter (callout 1) as shown in this image.

Workspace Workspace ?

Activities: My Appointments Search... Hide Filters Record Set My subordinates own Export List

Filters Clear All + 79 Results Sort Date

	Date	Location	Type	Account	Owner	Actions
▼ Date	4/21/21	6:00 AM	Meeting	TCM Customer US)	Matt Hooper	...
▼ Type	4/21/21	6:00 AM	Meeting	TCM Customer US)	Matt Hooper	...
▼ Account	4/23/21	12:00 AM		TCM Customer US)	Matt Hooper	...
▼ Activity	4/26/21	7:00 AM	Meeting	BIQA B2C Communications US)	Matt Hooper	...
^ Owner	1/4/22	10:30 AM	Meeting		Matt Hooper	...
<input type="checkbox"/> Matt Hooper 79	1/4/22	6:30 PM	Meeting		Matt Hooper	...
Search	1/4/22	6:31 PM	Meeting		Matt Hooper	...
^ Record Set	1/4/22	6:32 PM	Meeting		Matt Hooper	...
My subordinates own					Matt Hooper	...

Related Topics

- [Refine Search Results Using Filter Values](#)

## Can I search for Territories by Dimension in Workspace?

Yes. You can use Workspace to search additional filter criteria for your territories by dimension coverage details, such as included accounts, products, or geographies. This search capability lets you locate the territories for a specific named account or dimension while resolving territory gaps.

See also the section Search and Filter for more information.



### Related Topics

- [Search for the Information You Need](#)
- [Refine Search Results Using Filter Values](#)

## How can I differentiate between Quote ID fields when I filter for Opportunity search?

There's only one field in the Opportunity object that's named Quote ID. However, the predefined Add fields feature displays the Quote ID field as a filter to search for opportunities based on the External Quote Number attribute of their associated quotes.

This results in the Quote ID field being available in a few predefined saved searches and can't be modified. Your administrator can create a custom Quote ID field by using a different name so that you can easily differentiate the fields to suit your requirements.

Note that if similar scenarios arise when searching across other objects where identical custom field names and predefined field names display in your search results, then you can request your administrator to create a custom field with a label that suits your specific business requirement.

## How can I search for appointments that don't have a corresponding call report?

Use the My Calls to Log saved search in Workspace to look for appointments that don't have a corresponding call report.

From the list of search results returned, you can use either the **Create Call Report** or **Decline Call Report Creation** actions to follow through on appointments.

## How are recurring appointments managed in Workspace?

When you create a recurring appointment, the record is displayed in Workspace and is immediately indexed. You must include an end date or a number of instances.

However, all the recurring instances of the appointment record gets indexed and only display after a periodic index is run. Likewise, if you delete a recurring appointment, the appointment record is removed but the recurring instances get deleted after the periodic indexing job is processed.

If you change the recurrence rule for your appointment, then all existing recurrence records are deleted. New recurring instances are recreated based on the new rules and the changes are reflected after a periodic indexing run. Any exceptions to a recurring appointment gets created when a recurring instance is updated and is reflected after periodic indexing.

## What actions can I take on multiple records at the same time?

You can perform several actions on multiple records at the same time. This saves you time and helps improve efficiency. For example, you can select multiple leads in Workspace and qualify them all by selecting the Qualify action.

Here's a list of the Lead actions that you can perform on multiple lead records: Accept, Delete, Qualify, Unqualify, Update, Rank, Run Assignment, and Score.

When you select multiple activity records, you can also perform these Activity actions all at one time: Mark Complete, Delete Task, Delete Appointment, and Delete Call Report.

## How can I mark favorite records in Workspace?

You can change the columns that display for your search results in both your Workspace UI and in work areas supported by Adaptive Search. You can also mark your favorite records so that you can find them more easily.

For example, if your administrator has enabled the **Favorite** field for your business objects, you can add the Favorite column to display on the search results page and in what order by clicking Edit Column (the pencil icon). From the Edit Columns page, search for Favorite and move from the Available area to the Selected area and click **OK**.

Those records that are marked as Favorite are represented by a color filled star icon. Those items not marked as favorites have a clear star. 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*

- [Mark Favorite Records](#)
- [Enable the Favorite Field for Quick Access to Records](#)

## How can I perform record-level navigation from Workspace?

You can use Previous and Next buttons on the record details page to navigate lists of records in Workspace. This significantly reduces the time spent going back and forth between edit and list pages.

Record-level navigation is available on the details pages only while navigating records for Account, Activity, Asset, Campaign, Contact, Deal Registration, Lead, Opportunity, Partner, Partner Contact, Territory, and custom objects through the Workspace UI.

If you use dynamic tabs, then the **Previous** and **Next** buttons on the record details page won't be available for navigating lists of records.

## Can I use Workspace to manage accounts and contacts without additional setup?

Yes, Adaptive Search and the Workspace for accounts and contacts is available for all users, even those who haven't enabled Adaptive Search.

Oracle automatically runs the Publish process behind the scenes to index accounts and contacts for Adaptive Search. This means that all salespeople see the Workspace icon on the home page and can use Workspace to manage accounts and contacts without additional setup.

## Can I merge similar account or contact records in Workspace ?

You can select similar account or contact records and submit a request to merge them as one account or contact record in Workspace. By consolidating and merging similar records, you help ensure data integrity so that clean customer data is available to all users.

To avail of this feature, you must get your administrator to set the Merge Request Enabled profile option.

### *Related Topics*

- [Enable Merge Requests for Accounts and Contacts](#)

## Can I perform partial term matching when searching for my records?

Yes, partial term matching is available for identifying fields of objects. Each object has 1 field defined as the identifying field.

For the objects that have detail pages, the identifying field is the one that is used to drill down into the details page of that object. For example, **Account Name** is the identifying field for Account. If you want to perform a partial match on the **Account Name**, enter `Laptop` as your search term, and Adaptive Search will return results like Laptops, Laptop Dell, Laptop IBM and so on.

Only exact matches are returned for matching terms on non-identifying fields. However, if you add a wildcard to the search term such as `Laptop*`, then you get all results including Laptops, Laptop Dell, Laptop IBM and so on.

## Can I add a signed-in user as a search filter for resource-based fields?

Yes, you can now use the `Is Me` operator on resource-based fields in Workspace to add the current user as a filter when performing a search.

The **Is Me** operator lets you create saved searches with user-specific filters and supports the following objects and fields:

Object	Field
Account	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Team Members</li> <li>Owner</li> <li>Created By</li> </ul>
Activity	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Owner</li> <li>Created By</li> <li>Delegated By</li> </ul>
Asset	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Team Members</li> <li>Created By</li> </ul>
Campaign	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Owner</li> <li>Created By</li> </ul>
Contact	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Team Members</li> <li>Owner</li> <li>Created By</li> </ul>
Deal	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Team Members</li> <li>Owner</li> <li>Created By</li> <li>Approval Decision By</li> <li>Submitted By</li> </ul>
Lead	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Team Members</li> <li>Owner</li> <li>Created By</li> </ul>
Opportunity	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Team Members</li> <li>Owner</li> <li>Created By</li> </ul>

Object	Field
	<ul style="list-style-type: none"> <li>Resource</li> </ul>
Revenue Lines	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Created By</li> <li>Owner</li> <li>Primary Partner</li> </ul>
Service Request	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Team Members</li> <li>Assigned To</li> <li>Created By</li> <li>Reported By</li> </ul>
Territory	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Team Members</li> <li>Owner</li> <li>Created By</li> </ul>
Work Order	<ul style="list-style-type: none"> <li>Last Updated By</li> <li>Owner</li> <li>Created By</li> </ul>

## Can I search dynamic choice list (DCL) values based on the Resource object?

Yes, you can view, search, and add filters on all dynamic choice list fields for the Resource object using Adaptive Search.

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.

**Note:** To use this feature, your administrator must have enabled and published the Resource object and defined a custom Resource dynamic choice list profile option so that it's available for searching.



# 5 Global Search and Legacy Work Area Search

## Two More Ways to Search Your Sales Application

Aside from the search you get in Workspace and the new work areas powered by Adaptive Search, there are two more ways you can search your application:

- You can use the global search located at the top of the application page to find all the records related to your search term across application objects. Global search uses Adaptive Search, the same underlying search technology as Workspace, so you can search for items using related information. For example, you can find all the accounts in a city, by searching on the city name. Which related information you can use depends on how your application is set up.



- If your organization hasn't opted in to the new work areas powered by Adaptive Search or you're searching in the Products, Business Plans, and other work areas that aren't yet converted to Adaptive Search, your search experience is going to be slightly different:
  - You get different saved searches.
  - Filters aren't as versatile.
  - You can't search using related information from the search box.
  - The wildcard character you use to represent missing letters in search terms is different too: Work areas use the percent sign (%), while both global and Workspace searches use the star (\*).

## Use Global Search for Keyword Searches Across Sales Objects

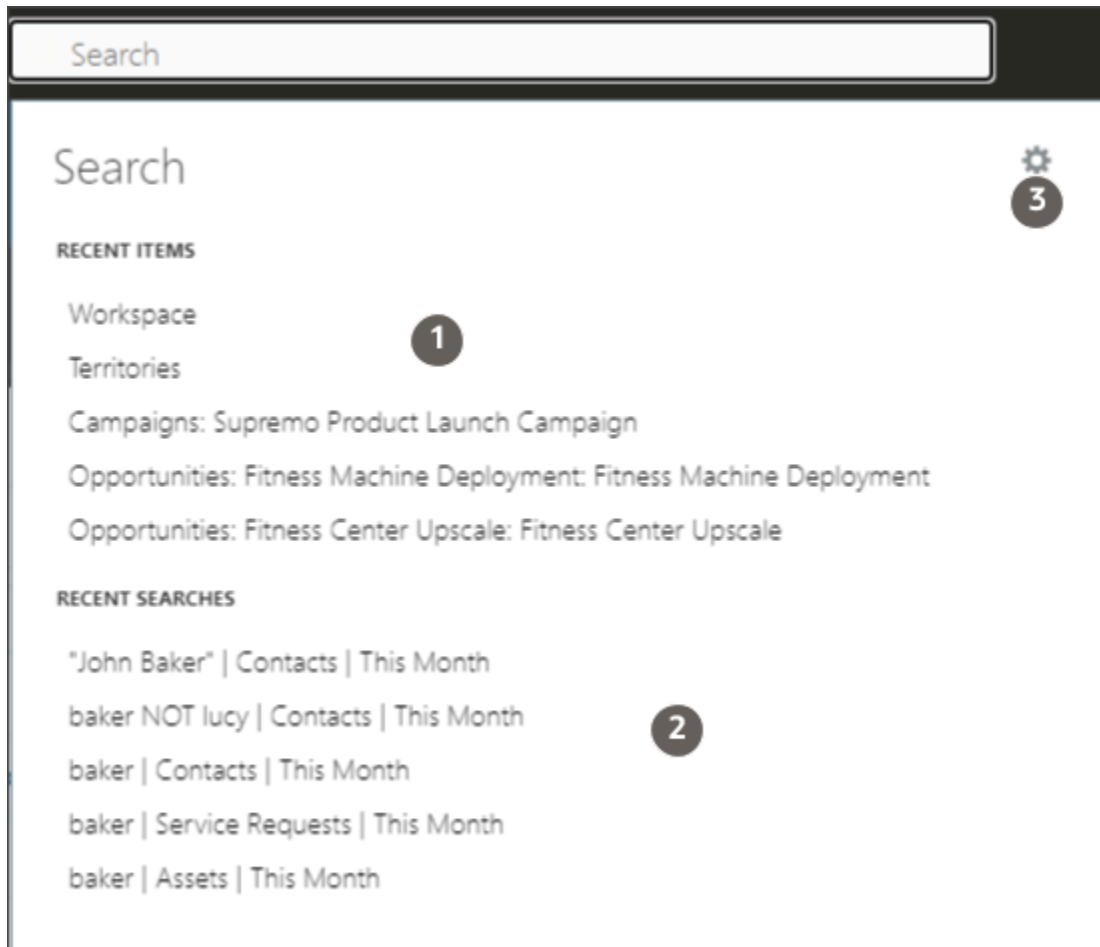
Here are some tips on using global search to search by keyword across all of your sales information.

**Note:** You can't search for contacts by email address or phone number because these are Personal Identifiable Information (PII).

### Check the List of Recent Items and Searches

Placing your cursor in the global search box displays a list of recent items you opened (callout 1 in the screenshot) and your recent searches (callout 2). If you see what you're looking for, just select it. Or start typing any one of the words in the search term. Capitalization doesn't matter. As you type, the application matches your entry to your recent searches

and any records you viewed. Aside from the recent items, there's also a Personalize icon (the gears icon highlighted with callout 3) that you can use to control which items are included in your searches.



## Search Complete Words

Here's how to search:

1. Finish typing a complete word.
  - o If you're searching for an item with multiple words in the name, you can enter any of the words. For example, a search for **Angel** retrieves matches for the account names Vitamin Angels, Los Angeles Rubber, and Angeles Warehouse.
  - o Capitalization is ignored.
2. Press **Return**.

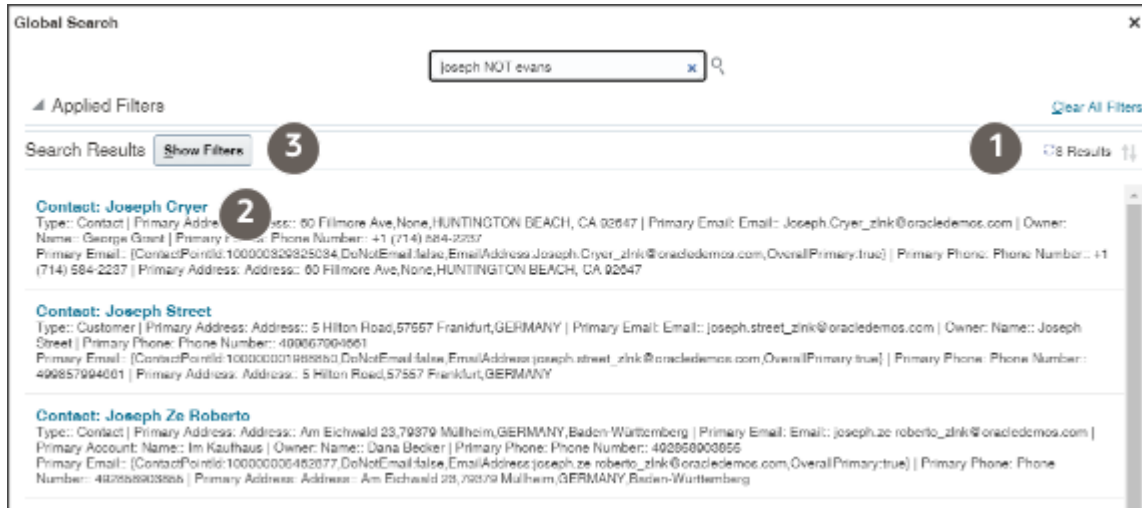
The application displays a list of records that contain your search term.

- o Results with exact matches get displayed first.
- o The search also matches your entry with similarly spelled words. Search results based on such fuzzy matches are rendered below exact matches. The most relevant items are always displayed first. The fuzzy match settings can be changed during setup. By default, the application displays spellings that are one letter off provided that the first three letters of the word match exactly. A keyword search on the



term **cernar**, for example, may return "Cerner" or "Cernas" in the search results. It won't return "Cesner", "Carner", or "Kerner".

When you're searching across multiple objects, the full results may take a while to complete. The application displays the number of results (callout 1 in the following screenshot).

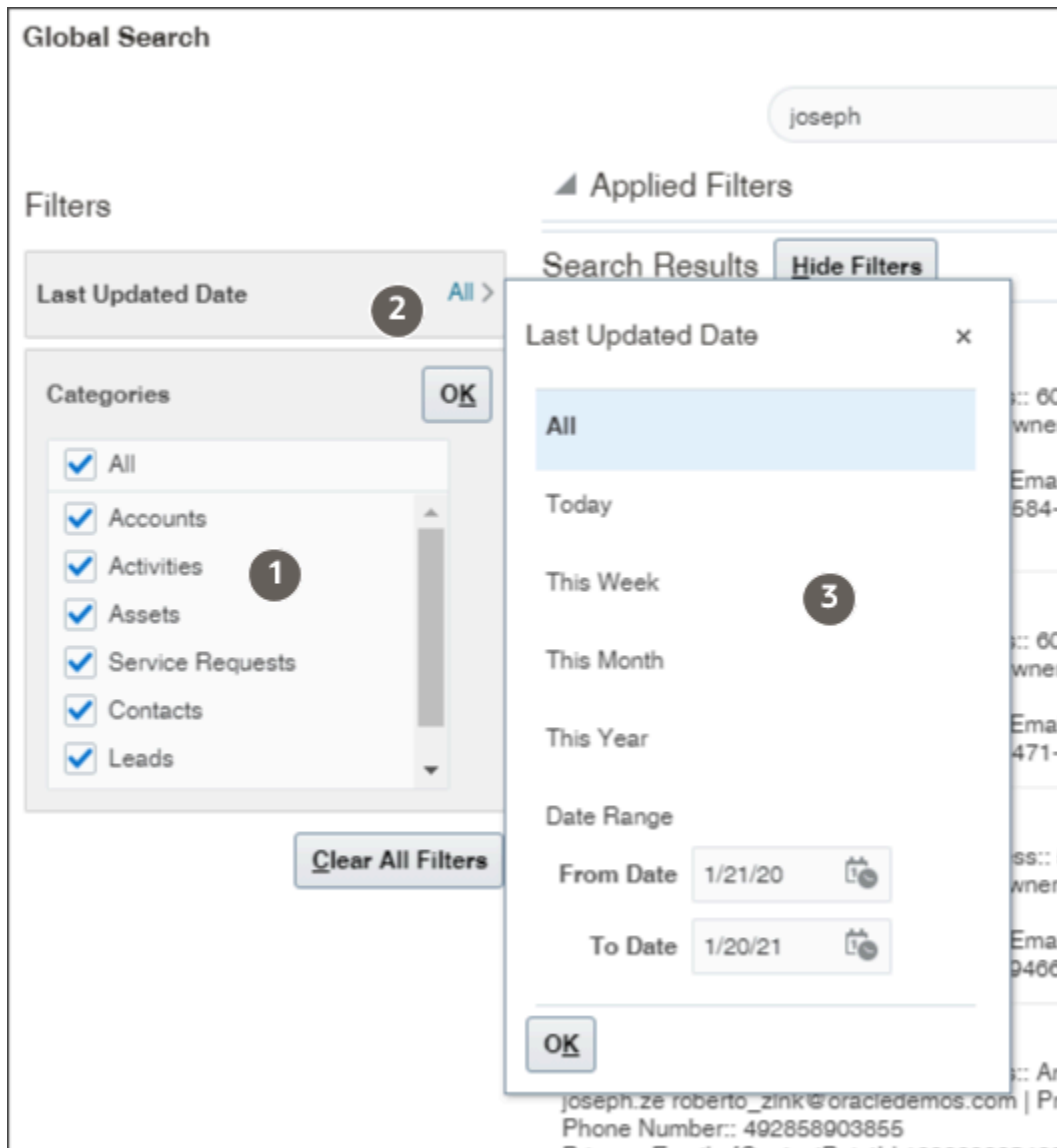


3. If you see the item you're looking for in the results, you can open it by drilling into the heading link (callout 2).

## Narrow Down Your Search Results Using Filters

You can also narrow down the search results after you search. Just click **Show Filters** (highlighted by callout 3 in the previous screenshot) to display the list of the objects included in the search (callout 1 in the following screenshot). You can also filter your results by date by clicking **All** link (callout 2) and selecting a date range (callout 3).

You must click **OK** after you make filter changes for your changes to take effect.



## Search Partial Words, Exact Phrases, and Use Operators

You can search on partial words, exact phrases, and use operators between words. Here's how:

- Use the star (\*) symbol to indicate missing characters or partial words. You can use the symbol at the beginning, end, or middle of the search term.

For example, entering \*tion as your search term to find all items ending with the letters tion. Entering the star symbol in the middle of a word such as p\*i\*le, returns Pinnacle, Pineapple, and so on.

- Use the question mark (?) to match exactly one character. You can use this wildcard at the beginning, end or middle of a word.

For example, entering pxi?e returns Price, Prize, Pride, and so on.

- Put multiple search terms in quotes to search for exact phrases.

For example, entering "Pinnacle Corporation" returns only Pinnacle Corporation, and any other records with those two terms in that specific order.

- Use the OR operator to search on multiple terms.

For example, entering Chicago OR Pittsburgh, finds accounts with those terms in the name. If your application administrator enabled searching on addresses, the results also include all accounts in Chicago or Pittsburgh.

- Use the NOT operator to narrow down your search.

For example, entering Pinnacle NOT Technologies when searching for accounts, returns all accounts with Pinnacle in the name, but not Pinnacle Technologies.

When you use NOT followed by two or more words you must enclose the words in double quotes (" ").

For example, entering Pinnacle NOT "Technologies Inc" when searching for accounts, excludes Pinnacle Technologies Inc.

- Capitalization doesn't matter on search terms, but the operators OR and NOT must be in uppercase letters.

## Limit the Number of Objects and Date Ranges in Your Searches

By default, your search runs against all of the available objects. If your searches are likely to return too many results, it's a good idea to narrow down the list of objects. That's especially true if you're using one of the wildcard characters in your search or you're searching on common terms. Here's how:

1. Click **Personalize** (the gears icon).
2. Select only the objects you want to search in the Search Categories tab.
3. Click **OK** to save your preferences.

The objects you selected remain in effect for all subsequent searches unless you change your selections. So, if you restrict your searches to contacts, you must change your selection to include accounts before you search accounts.

**Note:** You can't reorder search results using the arrow buttons and Autosuggest Groups aren't used by your application.

## Search Within Work Areas for Fastest Results

Use the different work areas to quickly search for accounts, opportunities, leads, and other objects:

- Start typing the record name and select the item from the list of recent items.
- Search for names using complete words or phrases.
- Search for partial words using the percentage sign (%) to stand for missing characters or words.
- Select a list, click the **Show Advanced Search** (the filter icon), and modify the search criteria.
- Search for the account itself first to find activities, leads and other objects related to an account.

## Start Typing the Name and Review the List of Most Recent Items

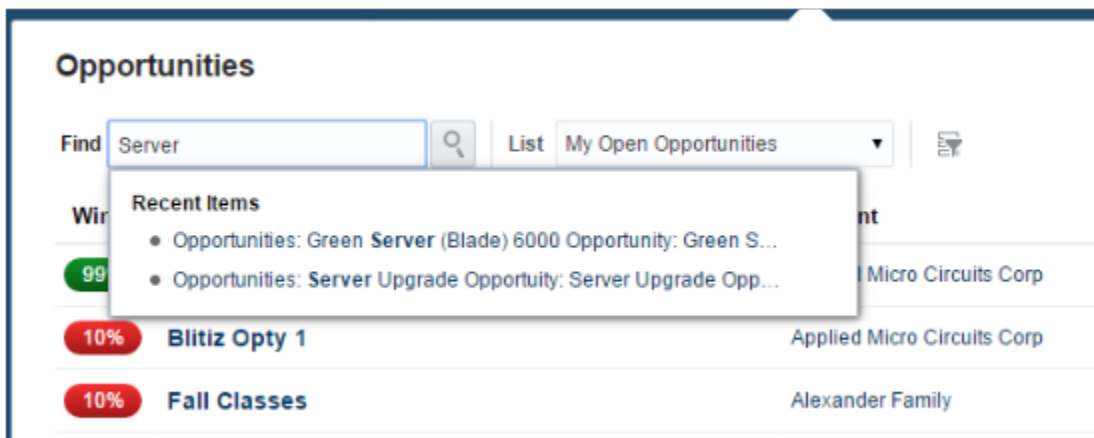
You can get to your most recent items, even before you finish typing their name:

1. Open the work area.
2. Click in the **Find** field.
3. Start typing any one of the words in the name.

Capitalization doesn't matter.

As you type, the application matches your entry to the records you opened, created, or updated recently and displays them in the Recent Items window. If you see what you're looking for, just select it.

Here's a screenshot of the Recent Items window in the Opportunities work area. In this example, entering `server` in the **Find** search field, displays two recent opportunities: Green Server (Blade) 6000 and Server Upgrade Opportunity.



## Search by Name Using Complete Words or Exact Phrases

If you don't find what you're looking for among the Recent Items, finish typing the word and click **Search** (the magnifying glass icon). The application displays a list of records with names that contain your search term, followed by records with related words, just in case you didn't type the word correctly. Say you're searching for accounts using the word `software`. The application first displays the account names that contain that word, such as Compucon Software and Forte Software Inc. That's followed by names with similar spellings, such as Softgear Inc.

**Note:** The application administrator can turn off the display of search results with similar spellings by setting the Include Similar Results in Searches profile option.

Here's a screenshot of the Accounts work area landing page showing a sample search for the word `software`. Callout 1 highlights the location of the two account names that include the exact spelling of the word in the name. Callout 2 shows the location of the account name with a similar spelling.

<input type="checkbox"/>	Name	Address
<input type="checkbox"/>	ABC Application Software	292 Brokaw Rd,SANTA CLAF
<input type="checkbox"/>	Compucom Software	2132 Hill Drive,ITHACA, NEW
<input type="checkbox"/>	Forte Software Inc	360 East Jackson Street,MED
<input type="checkbox"/>	Software Spectrum	1007 Wall Street,EVERETT, V
<input type="checkbox"/>	Axcense Software	1003 Wall Street,SEATTLE, W
<input type="checkbox"/>	Softgear inc.	4055 N Carson St,CARSON C

If you want to find the exact name you're searching for, then put quotation marks around your search terms. For example, "**Forte Software Inc**", returns just that one record.

## Search for Partial Words in a Name

You can also search for partial words:

- Put a percent (%) sign after two or more letters, and you get all the names with words that start with those letters.

For example, searching on `pin%`, returns Pinnacle Technologies and All Pines Furniture.

- Put the percent sign at the front of the term, and you get records that end with your term. For example, searching for `%ard`, returns The Board of Education and Edward Ward and Co.
- Put the percent sign at both ends, and you get all the customer names with words that include those letters.

**Note:** You can use the percent (%) sign at the beginning of your search term only in the **Find** field on the main page of each object.

Using the percent (%) sign can slow your searches, so enter a whole word if you know it.

## Search by Other Criteria Besides the Name

Use advanced search to search by criteria other than the name:

1. Whatever search criteria you enter are limited by the list you start off with, so start by selecting a list that's a superset of what you're looking for.  
  
For example, selecting All Opportunities lets you search within all the opportunities you can access. Selecting My Open Opportunities narrows down the scope of your search to just the open opportunities you own.
2. Click **Show Advanced Search** (the filter icon) to display the Advanced Search panel.

The panel displays the search criteria for the list you selected. Here's a screenshot highlighting the Advanced Search panel.

The screenshot shows the 'Opportunities' page with a search bar containing 'Name' and a 'List' dropdown set to 'Advanced Search'. A red box highlights the 'Advanced Search' panel, which includes the following fields:

- Saved Search:** My Open Opportunities (Required)
- Record Set:** Equals, Records I own
- Name:** Starts with
- Status:** Equals, Won
- Close Period:** Equals, Current Fiscal Quarter
- Close Date:** Between, 7/1/15 - 9/30/15

Buttons at the bottom of the panel include Search, Reset, Save, Add, and Reorder. To the right, a table header shows 'Win %' and 'Name', with the text 'No results found.' below it.

3. Here's how you can modify your search:

- 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.

- o Add additional fields to the search by clicking **Add**.
- o Select different operators for the fields in your search. Most of the operators, which differ field by field, are self-explanatory. But 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**

Including the Current User operator in the Last Updated By and Created By fields displays only the records relevant to you, the signed-in user. For example, when you search for opportunities last updated by the current user, you get a list of opportunities last updated by you.

- **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 must make these operators available 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.

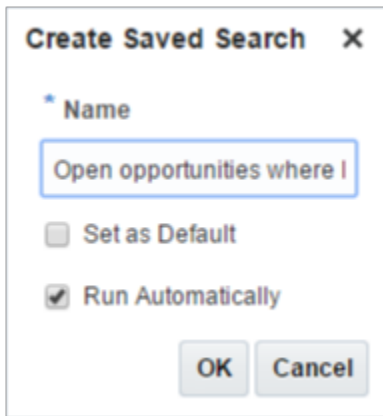
You can select specific columns or display all columns.

- 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. Click **Search** to display the results.

5. You can save your modified search as a new saved search (list):
  - a. Click **Save**.



- b. In the Create Saved Search window, enter a new name for the saved search.
    - c. Optionally, you can set this search to be the list that appears whenever you navigate to the work area by selecting the **Set as Default** option.
    - d. Click **OK**.

## Search for the Account to View Its Opportunities, Contacts, and Other Related Information

Instead of searching for an opportunity or contact in their work areas, you can search for the account instead and then drill down to the opportunity or contact from there. Whatever search method you use, always remember that you may not have permission to access all information in the application. For example, to see an opportunity, you may have to own the sales territory, be on the sales team, or manage someone who is.

There may be a delay of a few minutes between the time you create or update a record and when you and others can search for it. That's because the application must update an index to enable searches. You can access newly-created items from the Recent Items list in the meantime.

### *Related Topics*

- [How can I create saved searches with just one custom field?](#)
- [Two More Ways to Search Your Sales Application](#)
- [Create Your Personal List in a Work Area](#)
- [Delete or Hide a List](#)

## How can I add more fields to my search?

To add additional fields to your search in a work area, click Show Advanced Search (the funnel icon) and click Add in Advanced Search to select the field. The list shows only fields that are enabled for search.

If you don't see your field, an administrator may be able to make the field searchable using Application Composer. Not all fields can be made searchable.



## Personal Lists

### Create Your Personal List in a Work Area

Create your own personal list in any of the work areas where you see lists. That includes opportunities, leads, and accounts. To create your own list, also known as saved search, just modify one of the existing lists.

The detailed steps are a bit different for each business object, but the principles are the same. Here's an example of how to create a list of all accounts in the state of New York. Once you get the idea, you can create a new list in any work area. If you're adding a custom field as part of the search criteria, be sure that the field is indexed for search to improve performance.

The lists you create are available to you only. However, sales administrators can create lists for different sets of users by using the same sets of steps. They just have to use Page Composer in a sandbox and publish the sandbox to make the list available to others.

**Tip:** To improve saved search performance, restrict your lists 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.

### Create the List

1. In the work area landing page, click **Show Advanced Search** (the filter icon) to the right of the **List** field.
2. In the Advanced Search panel, from the **Saved Search** list, select the saved search you want to use as the basis of your new saved search. In this example, you're creating a list of all accounts in New York, so you can use the default **My Accounts** saved search.

**Tip:** To create a saved search entirely from custom fields, select **Account Name**.

3. In this example, you want to display all of the New York accounts you can access, so select **All records I can see** from the **Record Set** list.

The record set specifies the set of records to be searched. To improve search performance, you want to restrict your searches to a smaller record set. In this example, however, you can select **All records I can see** because you're restricting the number of records searched by adding the state field.

4. Click **Add**.
5. Select **State** from the list.
6. Enter **NY** in the **State** field.
7. Click **Save**.
8. In the Create Saved Search window, enter a new name.
9. If you don't want the new search to become the default, deselect the **Set as Default** option.
10. Make sure the **Run Automatically** option remains selected. This selection runs the query each time you select the list in the UI.
11. Enter a new name, for example, **NY Accounts**.
12. Click **OK**.

The work area landing pad and the Advanced Search Panel display the new search and the search results.

## Delete or Hide a Personal List

You can delete any work area lists you created. While you can't delete any of the lists provided by Oracle or by your application administrator, you can hide them from view. If you hide a list, you're affecting your own UI only.

### Delete a List You Created

1. In the work area landing page, click **Show Advanced Search** (the filter icon).  
The application displays the Advanced Search panel on the left side of the page.
2. Select **Personalize** from the **Saved Search** list.
3. In the Personalize Saved Searches window, click **Delete**.
4. Confirm your deletion by clicking **Yes** on the warning.

### Hide a List from View

1. In the work area landing page, click **Show Advanced Search** (the filter icon).  
The application displays the Advanced Search panel on the left side of the page.
2. Select **Personalize** from the **Saved Search** list.
3. In the Personalize Saved Searches window, select the saved search you want to hide and deselect the **Show in Search List** option.
4. Click **OK**.

The list is now hidden. You can restore the list in the future by selecting the **Show in Search List** option.

#### Related Topics

- [Create Your Personal List in a Work Area](#)

## How can I create saved searches with just one custom field?

You can create a saved search using a single custom field by editing one of the two single-field saved searches provided by Oracle: Name and Close Date. For opportunities and leads, use the Close Date list.

For all other objects, including accounts, use the Name list, for example, the Account Name list or the Contact Name list. You can only create a new search by editing an existing saved search and you can't delete any of the existing fields. However, you can leave the value of some fields blank, effectively enabling you to search using one custom field. For best search performance, you must index the custom fields used in the search.

Here's an example of how to create a saved search for a particular value of an account custom field:

1. On the Accounts work area landing page, click **Show Advanced Search** (the filter icon).
2. In the Advanced Search panel on the left side of the page, select **Account Name** from the **Saved Search** list.
3. Click **Add** and select the custom field.
4. Enter a value in the custom field.
5. Click **Save**.
6. In the Create Saved Search window, enter a new name for your search.

7. If you want the new search to become the default, select the **Set as Default** option.
8. Make sure the **Run Automatically** option remains selected. Selecting this option runs the query each time you select the list in the UI.
9. Click **OK**.



# 6 Infolets

## Quick Way to Get Key Sales Information and Take Action

The Sales Infolet 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 actionable infolets contain key metrics modified for sales roles in your organization. To get to the Sales Infolets page, you click the page controls (dots at the center of the welcome page). You can take action in the infolet by making a selection from a menu without having to drill down into a record.

Take advantage of the following sales-oriented infolets:

- **My Tasks**  
Quickly view and work on your most urgent tasks with minimum additional navigation.
- **My Appointments**  
Directly review, add, update, and add notes to your appointments. You can also access your calendar to create appointments.
- **My Accounts**  
View and manage account information from a single place. You can drill down to edit an account record as well as create accounts, filter your accounts and perform other quick actions.
- **My Opportunities**  
View, update, and add a note for your individual opportunities. You can drill down to edit an opportunity record as well as create opportunities, tasks, and appointments.
- **My Leads**  
View newly assigned leads, accept or reject individual lead records without having to drill down to the leads landing page. You can also create a lead and drill down to edit individual leads.

Use filters to find the records that need your attention. For example, you can filter your leads to see unaccepted leads only. Then use quick actions to accept a lead without leaving the infolet.

You can personalize your actionable infolets, refresh data, create and edit data as required. If you have the required privileges, built in configuration features help you effectively plan your day thus saving valuable time. For example, you can choose to select or hide predefined filters that you want to make available on the actionable infolets.

## Infolet Filters and Actions

With a few clicks, navigate to the relevant areas in your sales process where you can use filters to view the records that you want and take immediate actions. For example, with just a single click of a button, you can complete or defer tasks without having to drill down to view the record, or you can accept or reject new leads without having to navigate to the Leads UI.

Use the Configure menu item to add or modify filters and actions. You can also refresh your record data, edit the title of your infolet, move, hide, or show specific infolets on your infolet page.

Here are the predefined filters and actions available to you from your actionable infolets:

Actionable Infolet	Select one of these filters...	Select one of these record quick actions...	Select one of these infolet actions...
My Tasks	<ul style="list-style-type: none"> <li>• Today's Task (default)</li> <li>• Overdue Tasks</li> <li>• Tomorrow's Task</li> <li>• Beyond Tomorrow's Tasks</li> </ul>	<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>	<ul style="list-style-type: none"> <li>• Refresh</li> <li>• Create Task</li> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</li> </ul>
My Appointments	<ul style="list-style-type: none"> <li>• Today's Appointments (default)</li> <li>• Tomorrow's Appointment</li> </ul>	<ul style="list-style-type: none"> <li>• Create Note</li> <li>• Create Call Report</li> </ul>	<ul style="list-style-type: none"> <li>• Refresh</li> <li>• My Calendar</li> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</li> </ul>
My Accounts	<ul style="list-style-type: none"> <li>• My Accounts (default)</li> <li>• My Favorite Accounts</li> <li>• My Team Accounts</li> </ul>	<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>	<ul style="list-style-type: none"> <li>• Refresh</li> <li>• Create Account</li> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</li> </ul>
My Opportunities	<ul style="list-style-type: none"> <li>• Closing in Next 7 Days (default)</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>• Create Appointment</li> <li>• Create Task</li> <li>• Create Note</li> </ul>	<ul style="list-style-type: none"> <li>• Refresh</li> <li>• Create Opportunity</li> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</li> </ul>
My Leads	<ul style="list-style-type: none"> <li>• Unaccepted Leads (default)</li> </ul>	<ul style="list-style-type: none"> <li>• Accept</li> </ul>	<ul style="list-style-type: none"> <li>• Refresh</li> </ul>

Actionable Infolet	Select one of these filters...	Select one of these record quick actions...	Select one of these infolet actions...
	<ul style="list-style-type: none"> <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>• Reject</li> </ul>	<ul style="list-style-type: none"> <li>• Create Lead</li> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</li> </ul>

*Related Topics*

- [Personalize Your Key Infolets](#)
- [Modify Actionable Infolets](#)

## Personalize Your Key Infolets

You can personalize actionable infolets from the Actions menu. For example, you can edit infolet titles and views, move, hide, or show specific infolets and refresh the data displayed.

If enabled by your application administrator, you can personalize the layout, record count, filters, and actions at the record level for each of your infolets.

## Configure Layout of Actionable Infolets

Once enabled, the Configure menu item from the Actions menu becomes available so that you can personalize the actionable infolets to suit your requirements. For example, you might want to change the layout and size of columns, as well as the locations of the fields being displayed. You might want to use your own saved searches as view filters or hide some of the quick actions that might not be relevant to you.

Here's how to modify the layout of the My Opportunities actionable infolet:

1. Navigate to the actionable infolet that you want to modify.
2. Go to My Opportunities, and select **Configure** from the **Actions** menu.

The My Opportunities actionable infolet screen is displayed with the predefined fields selected.

3. From the **Layout** tab, select the attributes that you want to edit from the respective drop-down lists.
4. Set and adjust the two column table widths in percentage terms by sliding your mouse along the Column Width ruler.
5. Make the changes that you want to the attribute and select another attribute to edit, if required.

- In the **Drill Down Field**, select the item that you want to use for drilling down to the detail page of an opportunity.

**Tip:** If Dynamic Choice List fields are added to the Actionable Infolet, then the drill down 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
		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

- Click **Save and Close** when you have finished making the changes.

## Change the Record Count Display for Actionable Infolets

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:

- 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.
- From the **Record Count** tab, select the number of records that you want to display on the infolet from the drop-down list.
- Click **Save and Close**.



## 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.

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.

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. However, you must select at least one filter for the actionable infolet filter list.

This table lists filters that you can modify.

Actionable Infolet	Filter	Filter Description
My Tasks	<ul style="list-style-type: none"> <li>• Today's Tasks</li> <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 today</li> <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> </ul>

Actionable Infolet	Filter	Filter Description
		<ul style="list-style-type: none"> <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. Navigate to the actionable infolet that you want to modify.
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 with the predefined fields selected.
3. From the **Filters** tab, select the filters that you want to modify
4. Click **Save and Close** when you have finished making the changes.

## 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. For example, you can multiselect and double-click actions in the Selected list to move them to the Available list if you want to hide a quick action. However, you must select at least one action for the actionable infolet quick actions list.

Here are the selected quick actions that you can modify in 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> </ul>

Actionable Infolet	Quick Actions
	<ul style="list-style-type: none"> <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 Appointment</li> <li>• Create Task</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. Navigate to the actionable infolet that you want to modify and make sure that the infolet displays in expanded view.
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 with the predefined fields selected.
3. From the **Quick Actions** tab, select the actions that you want to modify.
4. Click **Save and Close** when you have finished making the changes.

## Edit Actionable Infolet Titles and Views

Here's how to edit titles and views for actionable infolets:

1. Click the **Actions** icon on the top right corner of the actionable infolet, and select **Edit Title and Views**.
2. Edit the infolet title, and enable or disable the infolet views.
 

The **Enable** option is automatically set to Yes. You can't disable a view of an infolet.
3. Click **Save and Close**.

## Move Actionable Infolets

To change the position of an actionable infolet within an Infolet page, click and drag the infolet, and drop it at the required position.

## Hide or Show Actionable Infolets

To hide an actionable infolet from an infolet page, click the infolet repository icon, and deselect the actionable infolet from the list of infolets. Alternatively, click the Actions icon on the top right corner of the actionable infolet, and select **Hide**. To show a hidden infolet on an infolet page, click the infolet repository icon, and select the infolet from the list of infolets.

### Related Topics

- [Modify Actionable Infolets](#)

## What happens if I delete an actionable infolet?

If you delete an actionable infolet by accident, then it's no longer available to you. You must contact your help desk to retrieve the data and recover the actionable infolet.

# 7 Workspace Infolets

## Overview of Key Sales Information for Workspace Infolets

The Sales Infolets tab in the Analytics section of your sales application contains actionable infolets that summarize sales information. These default classic infolets make it possible for you to take action on individual items without having to drill down into individual records.

However, 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 you quickly create your own search-based infolets with the Workspace user experience
- Let you personalize which information to display on your own pages, such as including features you frequently use in Workspace.
- Let administrators display different infolets for different job roles in the organizations

Before you can start using Workspace infolets, your administrator must enable them.

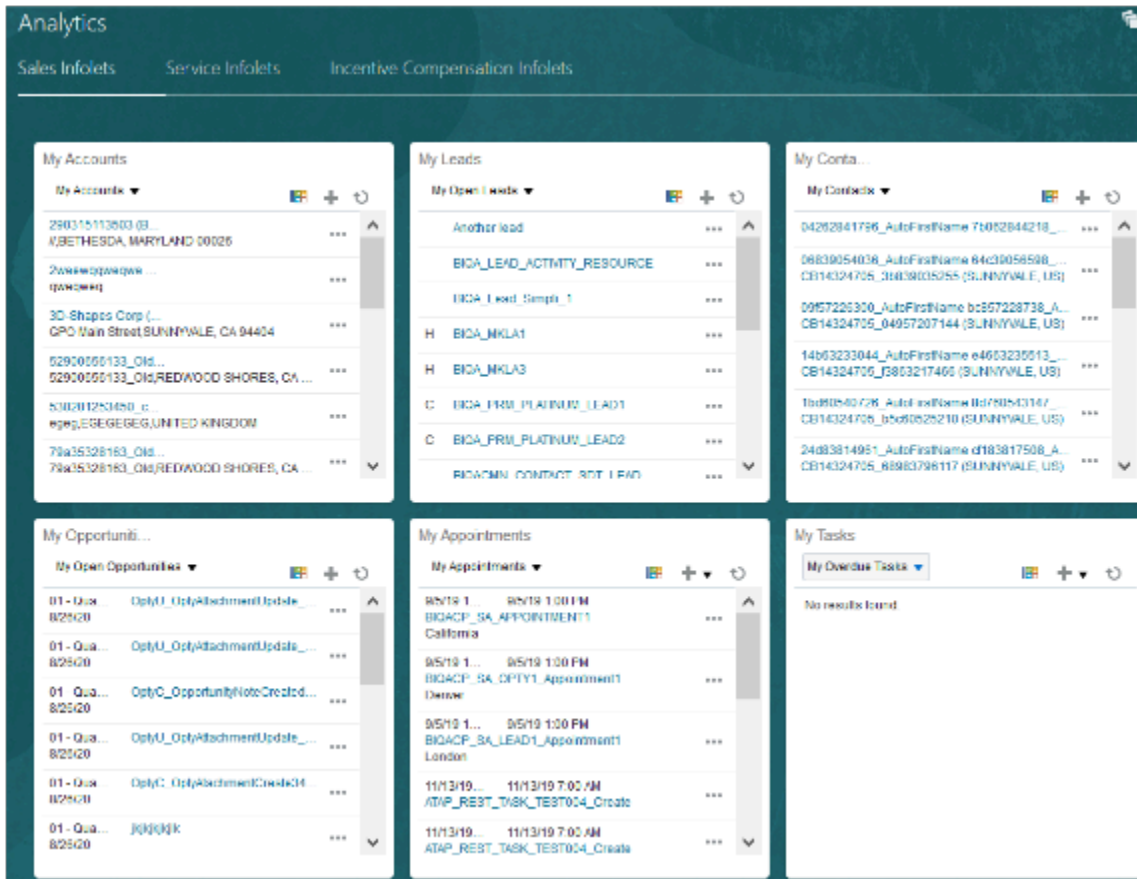
Oracle provides these predefined Workspace infolets:

- My Accounts
- My Appointments
- My Contacts
- My Leads
- My Opportunities
- My Tasks

The application includes four blank Workspace infolets that you can configure to display any combination of saved searches from Workspace. You can create custom Workspace infolets to display information on any of the objects, or combination of objects, available in Workspace, including assets, service requests, and custom objects. For example, if you created a project custom object to track projects involving multiple customers, you could configure one of the blank infolets as My Projects to track the accounts and the tasks involved. After the administrator enables Workspace infolets, the four blank infolets display automatically in the Infolet Repository. Each of the blank Workspace infolets has the same **Additional Actionable Infolet** name.

Each of the Workspace infolets include different filters to narrow down the list of items you see. For example, you can see all of the appointments for the whole week or just see today's appointments. The filters come from the saved searches (lists) available in Workspace.

Here's a screenshot of the Sales Infolets tab displaying the Workspace infolets.



See the chapters on Adaptive Search and Workspace in the Implementation Reference guide for setup information.

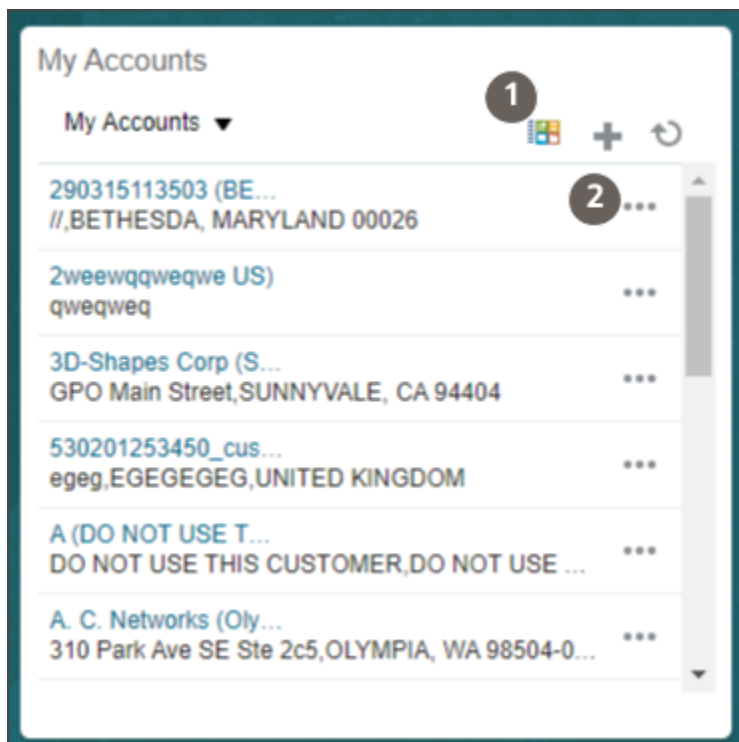
## Workspace Infolet Filters and Actions

With a few clicks, navigate to the relevant areas in your sales process where you can use filters to view the records and take immediate actions.

For example, with just a single click of a button, you can complete or defer tasks without having to drill down to view the record, or you can accept or reject new leads without having to navigate to the Leads UI. You can also refresh your record data, edit the title of your infolets, and move, hide, or show specific Workspace infolets on your infolet page.

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.

Make sure the infolet that's displayed on the page is a Workspace infolet. Workspace infolets include the Workspace icon (callout 1) and the three dots for quick actions (callout 2). Here's a screenshot of the My Accounts Workspace infolet:



## Predefined Workspace Infolet Filters and Actions

Here are the predefined filters and actions available to you from your Workspace infolets:

Workspace Infolet	Select one of these filters...	Select one of these record quick actions...	Select one of these infolet actions...
My Accounts	<ul style="list-style-type: none"> <li>• All Accounts</li> <li>• My Accounts</li> <li>• My List for Accounts</li> <li>• My Team Accounts</li> </ul>	<ul style="list-style-type: none"> <li>• Create Appointment</li> <li>• Create Note</li> <li>• Create Opportunity</li> <li>• Create Service Request</li> <li>• Create Task</li> <li>• Log a Call</li> </ul>	<ul style="list-style-type: none"> <li>• Refresh</li> <li>• Create Account</li> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</li> </ul>
My Appointments	<ul style="list-style-type: none"> <li>• My Appointments</li> </ul>	<ul style="list-style-type: none"> <li>• Create Call Report</li> <li>• Create Follow-up Appointment</li> <li>• Create Follow-Up Task</li> <li>• Create Note</li> <li>• Decline Call Report Creation</li> <li>• Delete Task</li> </ul>	<ul style="list-style-type: none"> <li>• Refresh</li> <li>• My Calendar</li> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</li> </ul>
My Contacts	<ul style="list-style-type: none"> <li>• My Contacts</li> <li>• My List for Contacts</li> </ul>	<ul style="list-style-type: none"> <li>• Add to Campaign</li> <li>• Create Appointment</li> </ul>	<ul style="list-style-type: none"> <li>• Refresh</li> <li>• Create Contact</li> </ul>

Workspace Infolet	Select one of these filters...	Select one of these record quick actions...	Select one of these infolet actions...
		<ul style="list-style-type: none"> <li>• Create Note</li> <li>• Create Opportunity</li> <li>• Create a Service Request</li> <li>• Log a Call</li> </ul>	<ul style="list-style-type: none"> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</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>	<ul style="list-style-type: none"> <li>• Add to Campaign</li> <li>• Convert Lead</li> <li>• Create Appointment</li> <li>• Create Note</li> <li>• Create Task</li> <li>• Log a Call</li> <li>• Qualify</li> <li>• Rank</li> <li>• Reject</li> <li>• Retire Lead</li> <li>• Run Assignment</li> <li>• Score</li> </ul>	<ul style="list-style-type: none"> <li>• Refresh</li> <li>• Create Lead</li> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</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>	<ul style="list-style-type: none"> <li>• Create Appointment</li> <li>• Create Opportunity</li> <li>• Create Service Request</li> <li>• Create Note</li> <li>• Create Task</li> <li>• Log a Call</li> </ul>	<ul style="list-style-type: none"> <li>• Refresh</li> <li>• Create Opportunity</li> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</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>	<ul style="list-style-type: none"> <li>• Create Call Report</li> <li>• Create Follow-Up Appointment</li> <li>• Create Follow-Up Task</li> <li>• Create Note</li> <li>• Decline Call Report Creation</li> <li>• Delete Task</li> <li>• Mark Complete</li> </ul>	<ul style="list-style-type: none"> <li>• Refresh</li> <li>• Create Task</li> <li>• Configure</li> <li>• Edit Title and Views</li> <li>• Hide</li> </ul>

## Add a Saved Search List as a Filter to the Workspace Infolet

For each of the six predefined Workspace infolets, you can choose which Workspace saved search list to view from the drop down filter menu configured by your administrator. Click the Workspace icon in the top right of the Infolet to drill down to the currently selected filter list. This action takes you to the Workspace UI. Click Home to return to the Sales Infolets tab on the Analytics page.



To add a list as a filter:

1. Click **Home** to return to the home page.
2. Scroll down to the Analytics section where the infolet is located.
3. Click **Actions** (the arrow icon in the top right corner of the infolet) and select **Configure**.
4. In the window, click the **Filters** tab.
5. In the **Search** field, start to enter the name of the saved searches you want as filters to display, and from the list returned in the Available column, highlight the saved searches you want.
6. Move the list you want from the **Available** to the **Selected** column.
7. You can use the arrow buttons to change the order of the filters.
8. Click **Save and Close** to close the window and return to the home page.

The filter is now available in your Workspace infolet.

## How can I show quick actions on my Workspace infolets?

From the Manage Infolet page, click the Layout tab and ensure that the Show quick actions check box is selected. This action displays the quick actions that you can perform at the record level for your Workspace infolet.

## What happens if I delete a Workspace Infolet?

If you delete a Workspace infolet by accident, then it's no longer available to you. You must contact your help desk to retrieve the data and recover the infolet.



# 8 Sales Insights

## About Sales Insights

Sales Insights help provide an objective understanding to salespeople working with accounts, leads, and opportunities.

Based on detailed analysis of account interaction and historical exchanges such as sales activities, status, duration, contacts, and so on, salespeople can gain key insights and take appropriate corrective actions on records to further increase their sales pipeline.

As sales insights evolve over time, context-based recommendations are made available to salespeople to help them evaluate and decide on what actions to take on appropriate next best lead and opportunity records or tasks for an account.

Sales data is mined, evaluated and analyzed through data analytical and statistical modules. Adaptive search finds key metrics, calculate standard deviations, averages, and margins to deliver insights. Standard query language programs sorts and classifies the data so that key sales metrics are readily available to salespeople to help them focus on those records that need attention.

## View Account Engagement Level From Sales Insights

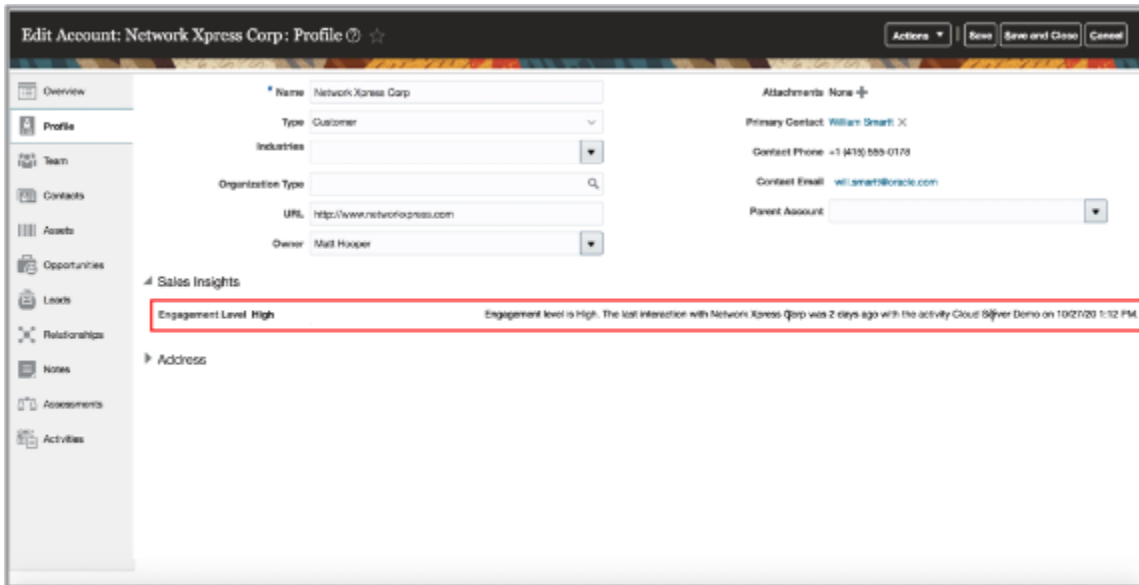
Sales representatives, managers, and leaders can view an objective understanding of the engagement level of accounts based on detailed analysis of account interaction and historical exchanges.

They can view at a glance which accounts have high, moderate, or low engagement and this helps them plan and prioritize the next set of actions. Knowing which accounts to target for the next sales outreach allows them to create more leads and increase the pipeline.

Sales insight details about account tracking activities is accessed from the **Profile** tab on the Accounts page. Identifying those accounts that are either highly or moderately engaged and by observing certain accounts helps salespeople to:

- Prioritize the next set of actions for records and tasks
- Improve productivity with moving the sales pipeline along
- Identify quickly what's wrong with a lead or opportunity and take the necessary corrective action

Here's an example of a sales insight for an account.



## Optimize Lead Nurturing Through Sales Insights

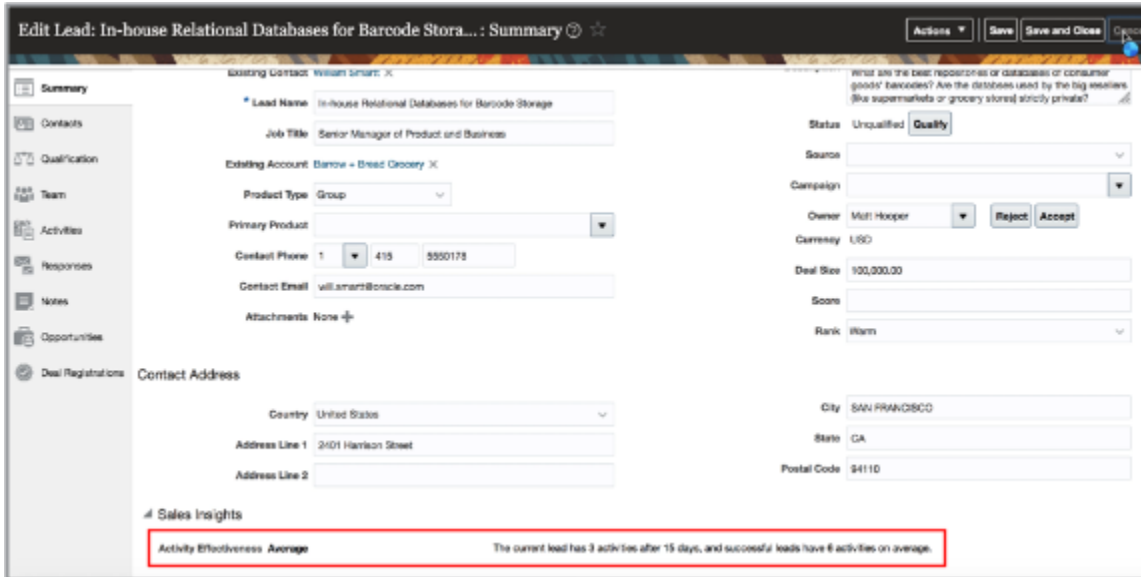
You can improve your sales effectiveness by receiving key sales data insights on lead tracking activities. Using data analytics and mining, this feature seeks any discrepancies in activities based on historical data to deliver key insights on leads to optimize the nurturing process.

Data insight details about lead tracking activities is accessed from the Summary tab on the Lead page. By knowing if the activities associated with a given sales lead are sufficient and accurate helps you effectively optimize your leads and move them along the sales pipeline.

Here are some examples of how you can avail of key lead sales insights to help with your sales activity tasks. For example, sales representative may want some insights to check if they're doing enough to nurture Leads while sales managers may want to gain an objective understanding of:

- Which Leads aren't being nurtured effectively and need more attention?
- Who are our most engaged customers?
- Which accounts can be reached again to increase the sales pipeline?

Here's an example of sales insights for leads.



## Optimize Opportunity Nurturing Through Sales Insights

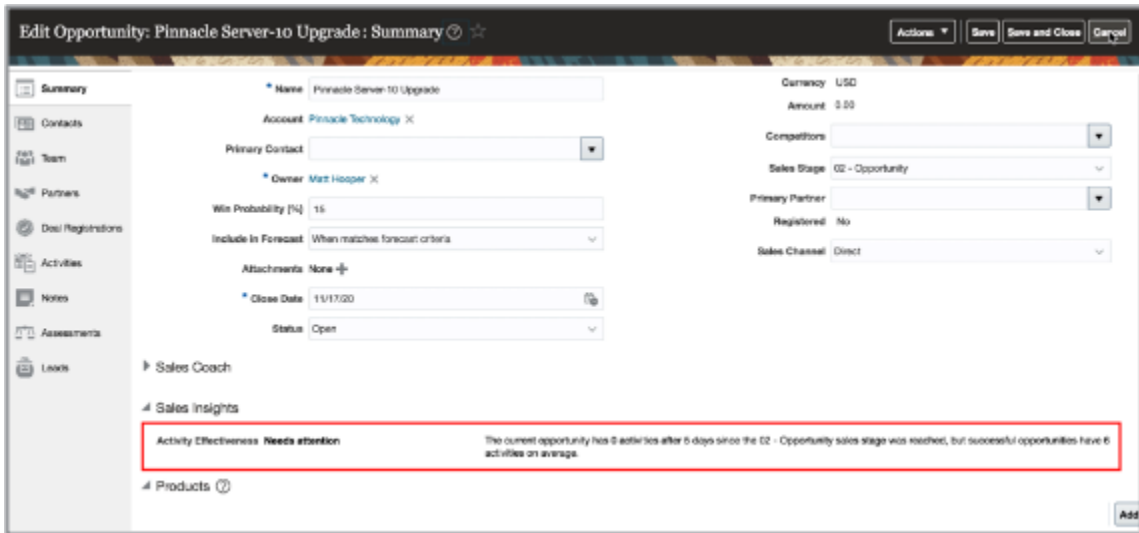
You can improve your sales effectiveness by receiving key sales data insights on opportunity tracking activities. Using data analytics and mining, this feature seeks any discrepancies in activities based on historical data to deliver key insights on opportunities to optimize the nurturing process.

Data insight details about opportunity tracking activities is accessed from the Summary tab on the edit Opportunity page. By knowing if the activities associated with a given opportunity are sufficient and accurate helps you effectively optimize your opportunities and move them along the sales pipeline.

Here are some examples of how you can avail of key opportunity sales insights to help with your sales activity tasks. For example, sales representative may want some insights to check if they're doing enough to nurture opportunities while sales managers may want to gain an objective understanding of:

- Which opportunities aren't being nurtured effectively and need more attention?
- Who are our most engaged customers?
- Which accounts can be reached again to increase the sales pipeline?

Here's an example of sales insights for opportunities.



## Validate Contacts for Leads and Opportunities through Sales Insights

You can improve your sales effectiveness and gain productivity by receiving key data insights about contacts for leads and opportunities. Contact validations are based on historical data, contacts relationships, and the successful interactions associated with an opportunity or a lead.

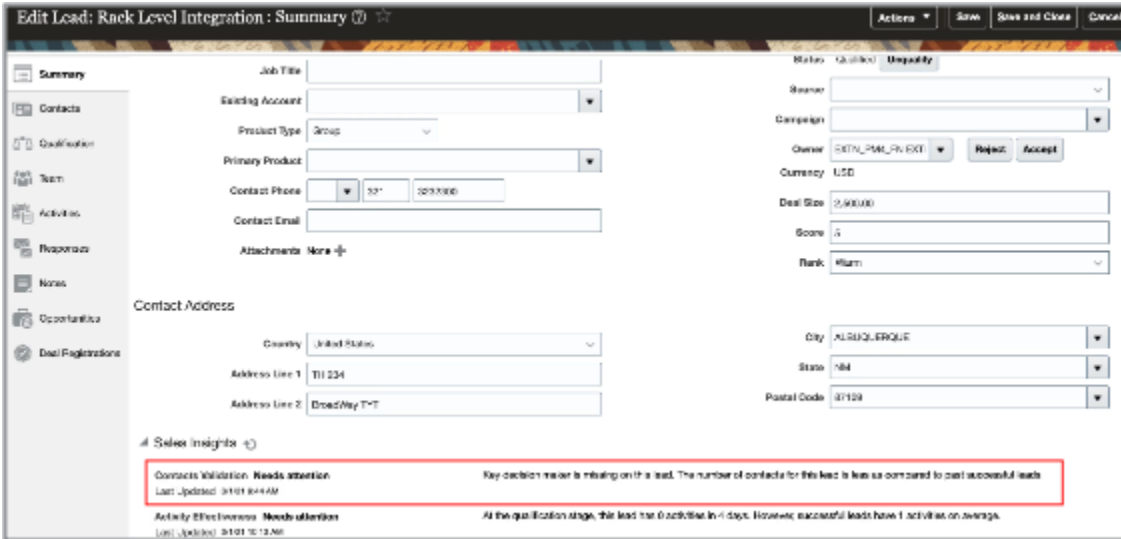
You want to know if contact details associated with your leads and opportunities are accurate and correct all the time. Data insight details about lead and opportunity contacts are validated based on historical data and contact relationships. This helps improve your productivity by ensuring that you have correct and accurate contact without having to research and validate your contacts manually.

### Lead Contact Validation

You can access the data insights for lead contacts validation from the Summary tab on the Edit Lead page. By knowing if the contacts associated with a given lead are sufficient and accurate helps you effectively optimize your leads and move them along the sales pipeline.

Data insights use the average number of contacts for the past successful leads of a given account as object metrics. Leads without an account don't qualify for both metrics and fact generation. Leads are classified as **Good** if the lead includes a Key Decision Maker. A classification of **Needs Attention** indicates that there isn't any Key Decision Maker identified for the lead. The comparison of current contacts count with that of past successful leads is added as part of the explanation category text.

Here's an example of lead contact validation using sales insights.

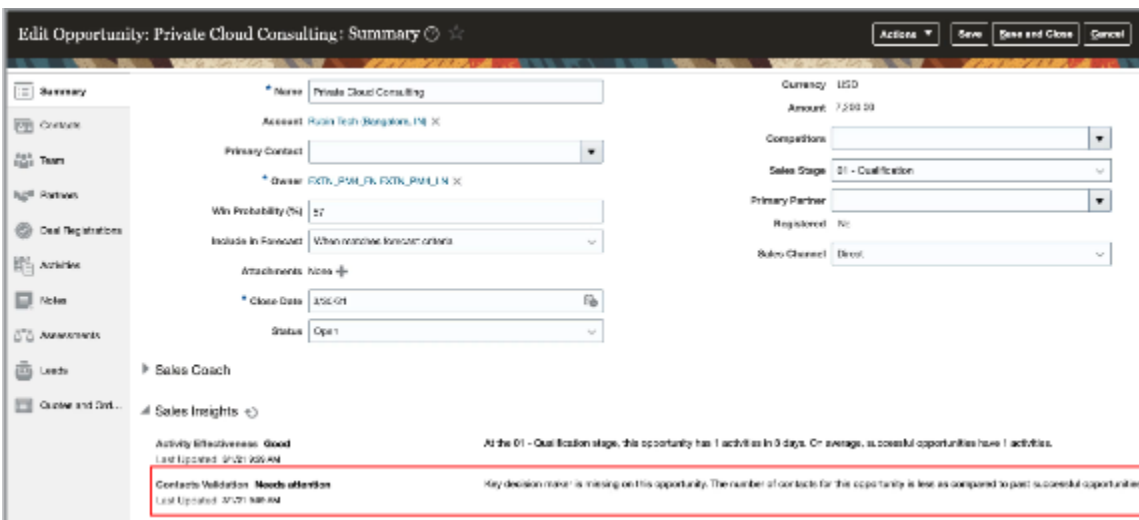


## Opportunity Contact Validation

Data insight details about opportunity tracking activities is accessed from the Summary tab on the edit Opportunity page. By knowing if the activities associated with a given opportunity are sufficient and accurate helps you effectively optimize your opportunities and move them along the sales pipeline.

Data insights use the average number of contacts for the past successful opportunities with same product group of a given account as object metrics. If historical data isn't available for the product group, then the account specific common average number is used. Opportunities without an account don't qualify for both metrics and fact generation. Opportunities are classified as **Good** if the current count of contacts is greater than or equal to the average contacts count. Otherwise, they're classified as **Needs Attention**. If there isn't any Key Decision Maker identified for the opportunity, then this information is added as part of the explanation category text.

Here's an example of sales insights for opportunities.



# Optimize Deal Execution and Lead Nurturing through Sales Insights

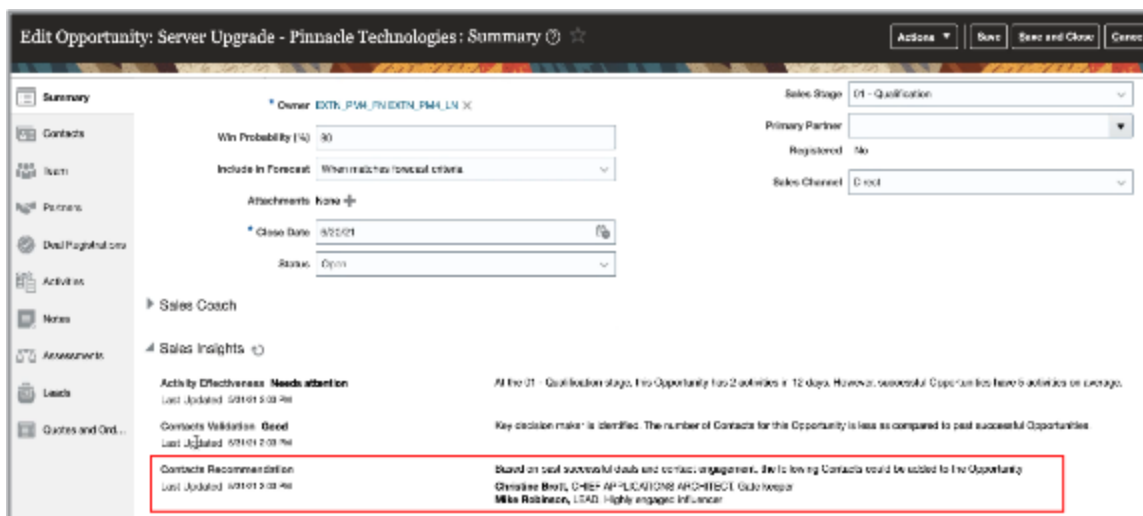
You can improve your sales effectiveness and gain productivity by receiving key data insights about contacts that help optimize deal execution and lead nurturing. Contact recommendations are based on historical data, contacts relationships, and the successful interactions associated with an opportunity or a lead.

Using data analytics and mining, Sales Insights recommends key contacts for each active opportunity or lead for the relevant account to help effectively close the deal.

## Opportunity Contacts Recommendation

Data insight details about recommended opportunity contacts is accessed from the Summary tab on the edit Opportunity page. By knowing that the recommended contacts associated with a given opportunity are sufficient and accurate helps you effectively optimize your opportunities and move them along the sales pipeline.

Here's an example of contacts recommendation for an opportunity using sales insights.



## Lead Contacts Recommendation

You can access the data insights for lead contacts recommendation from the Summary tab on the Edit Lead page. By knowing that the recommended contacts associated with a given lead are sufficient and accurate helps you effectively convert leads to opportunities and move them along the sales pipeline.

Here's an example of contacts recommendation for a lead using sales insights.



**Edit Lead: Rack Level Integration: Summary**

**Summary**

Primary Product: [Dropdown]  
Contract Phone: [Dropdown]  
Contract Email: [Text]  
Attachments: [Link]

**Contact Address**

Country: [Dropdown]  
Address Line 1: [Text]  
Address Line 2: [Text]

**Sales Insights**

**Activity Effectiveness: Good**  
Last Updated: 10/19/18 10:00 PM  
The current Lead has 4 activities after 8 days, and its successful Leads have 5 activities on average.

**Contacts Validation: Needs attention**  
Last Updated: 10/19/18 10:00 PM  
Key decision maker is missing on this Lead. The number of Contacts for this Lead is low as compared to past successful Leads.

**Contacts Recommendation**  
Last Updated: 10/19/18 10:00 PM  
Based on past successful deals and contact engagement, the following Contacts could be added to the Lead:  
Steven Shaw, CRO, Highly engaged Influencer  
Kirstin Smith, VP/OWNER, SPONSOR, ARCHITECT, Highly engaged Influencer  
Charles Gault, VP, Highly engaged Influencer



# 9 Accounts, Contacts, and Households

## Overview of Accounts, Contacts, and Households

You can use the Accounts pages to manage the information related to your sales accounts, including customers, prospects, contacts, and households.

Use the account management capabilities to:

- Create and update accounts, prospects, contacts, and households
- Maintain account hierarchy
- View household relationships
- Enrich customer data

As your work with the account management application, keep in mind the following terminology:

- **Account:** An account is an organization that a salesperson sells to. Accounts can be prospects or customers.
- **Contact:** A contact is an individual. A contact need not be related to a customer. A person may be a customer or a customer contact.
- **Customer:** A customer is someone with whom you have a selling relationship. The selling relationship can result from the purchase of products and services, or from the negotiation of terms and conditions that provide the basis for future purchases.
- **Household:** A household is a group of contacts with whom you have a selling relationship. Households provide valuable segmentation information about the household as a whole, as well as summary of information about the household member contacts. Usually all the contacts reside at the same address and have a similar set of attributes that accounts do, such as team members, territories, and contacts.
- **B2B and B2C:** Business-to-business and business-to-consumer, or B2B and B2C, are terms that indicate the type of customer relationship:
  - **B2B:** The customer is a business rather than an individual consumer.
  - **B2C:** The customer is an individual consumer rather than a business.

## Account Team Member Access Levels

Access levels control the team member's privileges for the account.

There are three types of account team membership access levels:

- View Only
- Edit
- Full

When you add a resource to the account team, the setting of the profile option, Internal Resource Sales Team Access Level Default, determines the member's default access level. See *Opportunity Team Profile Options* for more information.

If you remove a member of the account team, then that member no longer has access to the account. Only a member of a territory who's assigned to an account retains access. Resources in the management hierarchy of a newly added team member inherit the same access level of the subordinates.

## View Only

View Only is the minimum level you can assign to team members. Team members with View Only access can view details of the account, such as: account team, assessments, notes, and activities. The team member's resource role doesn't provide functional access to view a particular child attribute of an account. Without functional access a member can't view the attribute, regardless of their account team access level. The data security inherent on objects, such as leads and opportunities, determines whether team members can view details of that business object.

## Edit

Team members with the Edit access can view and edit all customer-related objects. The data security inherent on objects, such as leads and opportunities, determines whether team members can view details of that business object. They can also run the territory reassignment process, but they can't change the composition of the account team.

## Full

With Full access, team members can perform edit access functions and also change the composition of the account team. Initially, only the account owner and sales administrators have Full access, but they can grant Full access to other team members. Team members with Full access can do the following for other members:

- Manually add and remove other team members
- Change a member's access level
- Mark the lock assignment setting

**Note:** Team members must have Full Access to edit Account Profile and Household Profile pages.

# 10 Activities and Calendars

## Overview of Activities and Calendars

As a sales representative, you typically check your calendar for appointments that you have on any particular day before you begin your retail visit.

You can plan your day based on the appointments and the notes if any that you have or want to include in your appointment. After performing your activities, notifications can be sent by email or added to a global notification list so that you're kept informed of what you've completed.

Here's what you can do when you work with appointments:

- Add resources to an appointment.
- Use appointments to check your schedule and the visits that you need to make.
- Review the details of the visits for an account and plan your tasks for the day.
- Add an account to an appointment and the appointment is assigned to a field sales representative who's the owner of that account and appears on the assignee's calendar.
- Create notes for any additional information that you may need to record regarding your retail visit.

The activities pages include the My Calendar, My Tasks, and Activities pages. You use these pages to manage tasks, appointments, and call reports outside the context of a particular record. Within an activity, you can associate the activity itself with a record, such as a lead or opportunity. Additionally, in some of the sales applications, you can manage activities within the records themselves.

In the Activities pages, you can:

- Create new tasks and appointments.
- Search for and view tasks and appointments.
- Edit existing tasks and appointments.
- View reports and analytics information.
- Manage your calendar.
- View other sales users' calendars, as well as team calendars, with permission.
- View at-a-glance which tasks are overdue.

## Get Started with Activities

Activities help you keep track of things you plan to do, like tasks and appointments, or things that you need to track, like customer calls.

### Types of Activities

There are three types of activities:

- Tasks are to-do items assigned to people or groups.

**Tip:** You can use tasks to record completed customer interactions that aren't scheduled in your calendar as appointments.

- Appointments are calendar events, for example, a meeting with another person or a scheduled phone call.
- Call reports let you record brief summaries of your phone calls. They can be created from an appointment, a task, or standalone from the Activities landing page. When created from a task or appointment, the application automatically populates all pertinent data into the call report for you.

Collectively called "activities", tasks and appointments can be meetings, calls, demonstrations, events, and so on. The difference between a task and an appointment is that a task appears in a task list and has a due date and status, while an appointment is scheduled on your calendar with a specific date and time. For all activities, the Type field lets you categorize the item. For example, when you create a task you can set the type as a Call or a Meeting.

## How You Access Activities

From the home page you can use the Activities landing page, or list page, to access all of your activities. Additionally, the Activities tab in many of the edit pages lets you access the same functionality as the landing page.

Here are some things to keep in mind about the Activities list:

- Appointment and task icons make it easy to differentiate between the different types of activities.
- You can use the default search filters to quickly find a set of activities, and you can use the additional search operators to further expand or refine your search.
- Note that in the list of activities, columns may be blank if there's no applicable data. For example, some fields apply only to tasks and some only to appointments; thus, blank fields appear when there is nothing relevant to display.

To access a list of Activities from the home page:

1. Sign in as a salesperson.
2. On the home page, click **Sales > Activities**.
3. Click the **Activities** tab.

## Create New Tasks and Appointments

You can create new tasks and appointments in several ways:

- In the My Calendar page, click **Create Appointment** to create a new appointment.
- In the My Tasks page, click **Create Task** to create a new task.
- In the Activities page, click **Create Task** or **Create Appointment**.
- Create follow-up tasks or appointments from existing ones: In the Actions menu for the existing task or appointment, select **Create Follow-Up Task** or **Create Follow-Up Appointment**.
- Create tasks or appointments related to opportunities or leads: Navigate to a lead or opportunity and click the **Activities** tab. Tasks or appointments you create automatically are associated with the related record.

## Manage Your Calendar

Use the Calendar pages to keep track of all your appointments. You can:

- View your appointments in a daily, weekly, or monthly format, and either in a calendar view or as a list.
- Move appointments from one time and day to another day or time.
- Create new appointments, including recurring appointments.
- View and edit existing appointments.
- View your colleagues' appointments, if you have permission.
- Access additional calendars. Additional calendars, if enabled, are available after you click the **Manage My Calendar** icon.

See the Calendars section in this chapter for more topics on using calendars.

## Manage Your Tasks

The Tasks landing page displays your tasks that include a due date, allowing you to see at-a-glance which ones are due on which dates. Icons help you spot overdue tasks quickly. You can use the My Tasks list to sort tasks by due date, subject, or priority.

# Manage Your Calendars

Use the My Calendar page within Activities to manage calendar views.

## View Calendars

You can view calendars by day, week, month, or agenda. You can view the status of other deals by selecting a different calendar listed in the side panel. The steps to view a calendar using the side panel are the same for opportunity and account. In the following procedure, account is used as an example.

## Weekly View

The default calendar view is the Weekly View. From here, you can see all of the items on your calendar for the week. On the left, each user added to the team calendar is displayed (by default only the signed-in user is displayed, as in single calendar mode). Each day shows:

- Start time of appointment, with recurrence icon (if applicable)
- Whether the appointment is multi-day (indicated by an arrow)
- Appointment subject

You can view and edit the recurrence information in the Add: Recurrence dialog box that appears when you click the Recurrence button. Nonrecurring appointments display the edit page for the appointment.

**Note:** The appointment time isn't reset when the All Day check box is cleared.

You can only edit your own appointments. Even if your peers have given you permission to view theirs, you can't edit them. Appointments marked by others as Private display as Busy on their calendar entry, and don't include details.

## Day View

On the Day View, you can see all of the items on your calendar for the current day. On the left, each user added to the team calendar is displayed (the default only shows the signed-in user).

Along the top are the hours of each day, where the calendar entries are displayed. Each day shows:

- Start time of appointment, with recurrence icon (if applicable)
- Whether the appointment is multi-day (indicated by an arrow)
- Appointment subject

You can view and edit the recurrence information in the Recurring Appointments dialog box. Nonrecurring appointments display the edit page for the appointment.

You can only edit your own appointments. Even if your peers have given you permission to view theirs, you can't edit them. Others who can edit other users' appointments include:

- The administrator.
- The user's manager, if the person is in their resource hierarchy and the manager has the Sales Manager duty role.

Appointments marked by others as Private display as busy on their calendar entry, and don't include details.

## Appointment Colors

The legend at the bottom of the calendar displays the colors associated with different appointment types. If an appointment is of one of these types, the appointment box in the calendar is displayed in that color. You can change these colors using Setup Manager.

Appointments that show a user as busy don't display any details because you don't have access to their record.

## Add Appointments

To add new appointments to the calendar click **Create Appointment**. Selecting the check boxes next to the user names in your team calendar automatically adds those users as resources to the new appointment.

## Add Resource Hierarchy

Build a resource hierarchy in your calendar to view the schedule of resources you work with. Click the Manage My Calendar icon and use the search option below Resource Hierarchy to search and add a colleague. If you're adding a manager, you see the team as well. Expand the manager's name to see the members in the hierarchy.

# Make Your Calendar Appointments Visible to Others

You can let other users access your calendar appointment details by giving them permission to view them.



## How to Let Others View Your Calendar Appointments

Here's how you give others permission to view your appointments.

1. In the global header, within the Settings and Actions menu, click your user name and select **Set Preferences** under Personalization.
2. Select **Calendar and Appointment Preferences**. The Calendar and Activity page appears.
3. In the Additional Calendar Sharing Levels with Specific Resources section, add a row to the table. Select the individuals that you want to share your appointment details with.
4. Set the Access Level value to `show appointment details`.
5. Save your changes.

The users you select can access your calendar appointment details from the Calendar page by selecting your name in the **Resource** list.

### Related Topics

- [Can my administrator view and edit my appointments?](#)

## Update Details in External Appointments

You can update details such as your availability to the meeting and reminder in the external appointments synced to the sales application from Outlook.

Though you can update most of the fields in the external appointments, a few fields still remain read-only. The table here shows what you can change and what you can't.

Fields You Can Update	Read-Only Fields
<ul style="list-style-type: none"> <li>• Account</li> <li>• Opportunity</li> <li>• Lead</li> <li>• <b>Show Time as</b> indicates your availability for the meeting.</li> <li>• Set Reminder</li> <li>• Add Attachments</li> <li>• Add Objectives</li> <li>• Add Notes</li> </ul>	<ul style="list-style-type: none"> <li>• Externally Owned setting</li> <li>• Private</li> <li>• Subject</li> <li>• Location</li> <li>• Time zone</li> <li>• Start date and time</li> <li>• End date and time</li> <li>• All Day setting</li> <li>• All the fields on the Recurrence window</li> <li>• Owner</li> <li>• Resources</li> <li>• Contacts</li> <li>• Primary Contact</li> <li>• Description</li> </ul>

## What You Can Do on an External Appointment

You can do these actions on an external appointment:

- Create a follow-up appointment
- Create a follow-up task
- Create a call report
- Delete appointment

## Create Follow-up Activities for External Appointments

Create the follow-up activities such as the follow-up tasks, appointments, and call reports for external appointments synced from Microsoft 365.

Open an external appointment and click **Actions** to choose an appropriate action on your appointment. Use the **Delete Appointment** option to remove an external appointment from the CX Sales activities. The appointment will still be available in Outlook.

## Create Tasks from a Task Template

You can create tasks for a business object from a task template. First select a set of tasks for a template task and then create tasks. In this topic, the opportunity business object is used as an example.

However, the procedure to create task templates is the same for all the objects.

**Note:** Tasks can be autogenerated from a task template and displayed in the **Activities** subtab. For example, a task template is associated with a sales stage. On updating the sales stage, the autogenerated tasks appear in the opportunity **Activities** tab.

Here's how you create tasks from a task template:

1. From the Navigator, click **Opportunities**.
2. Select the opportunity for which you want to create a task.  
The Edit Opportunity page opens.
3. Click the **Activities** subtab.
4. Click **Create Tasks from a Template**.

**Note:** If the administrator hasn't set up task templates, a warning appears.

5. Select the template name from the available task templates.
6. (Optional) Enter the name of the owner of the task. If the field is blank, the signed-in user is set as default as the owner of the task.
7. Click **Save and Close**, on the Create Tasks from a Template page.

The tasks are created from the template.

## Track Updates with Call Reports

A call report is a central place for salespeople to capture what happened in a sales activity, make related changes, and track key updates. Call reports can boost salespeople's productivity by saving time, increasing visibility into their business, and selling more in less time.

A call report is a type of activity like tasks and appointments. You can create call reports for scheduled appointments or ad hoc call reports from the Activities tab. Each scheduled appointment can have multiple call reports, created by different salespeople. The call reports for an appointment are listed in and viewed from that appointment. Salespeople can also create ad hoc call reports to report sales activities that aren't scheduled on their calendar.

**Note:** The administrator must use Application Composer to enable the Create Call Reports button on the Activities tab, the Activities list, and the Tasks tab.

Call reports record a snapshot of the outcome of the sales activity and key changes, including:

- Outcome summary, meeting minutes, complete objectives, attendees, attachments, notes, and so forth.
- Related objects, such as appointments, accounts, opportunities, and leads

Appointment resources and others who have access to an appointment can create a call report from it. Multiple call reports can be created from one appointment.

## Add and Remove Objectives

Appointment objectives are copied over to the call report by default. You can add additional objectives, or remove existing ones.

To add objectives, you can either select them from a predefined list or type free text to add new ones. Predefined objectives include:

- Demo product
- Determine next steps
- Discuss proposal
- Identify stakeholders
- Review RFP or RFI (Review Request for Proposal or Request for Information)

You can check an objective in a call report to mark it as complete, or deselect it to mark it incomplete. Objectives copied over from the appointment or added by user are deselected by default.

## Appointment Contacts and Resources

Appointment contacts and resources are copied to the call report. You can add or remove contacts and resources. You can also check or deselect a contact or resource's attendance status to indicate whether he or she attended the meeting.

- Contacts that are defaulted from the appointment are marked as attendees by default.

- Resources that are defaulted from the appointment are marked as attendees by default if the resource's response in the appointment isn't Declined.
- Resources and contacts that aren't defaulted from the appointment and added by the user are marked as attendees by default.

## Appointment Outcome

You can select an appointment outcome from a list of predefined values. Your sales administrator can add or remove values from this list as needed. Default values are:

- Call answered
- Call transferred
- Captured issue
- Failed
- Left message
- Not available
- Provided information
- Successful
- Incomplete
- At risk
- Customer undecided

## Attachments and Notes

You can add attachments to a call report in the same way that you add them to other objects.

Anyone who has access to the call report can create notes on it. Call reports support both internal and external notes. You can use external notes to share with external contacts.

Any user who can view the call report can see non-private notes, but only the note creator can see private notes.

## Call Report Security

Call reports include a Private setting, which determines who can view it:

- If the call report is set to Private, then only the call report resources can view it.
- If the call report isn't set to private, then anyone who can view the related appointment can view the call report.

## Select Addresses for Activity Accounts and Contacts

If the administrator has exposed the address selector in the Activities pages, you can associate an address with an activity's account or contact. This association helps sales managers audit and relate call report contact or account location with actual sales.

Managers can also view an audit trail of a salesperson's customer visits. On a call report, the address selector helps to automatically populate the address of the account or contact.

Remember the following rules:

- You can change the selected address as needed, except after a call report is submitted.
- The addresses are available for accounts, if both accounts and contacts are defined for the activity.
- If only contacts are defined for an activity, but not an account, then the address shown is related to the primary contact.

Your administrator can enable the ability to select addresses on call reports, appointments, and tasks. Using the address selector on a call report is used as an example in the following procedure. To select an address:

1. Open an appointment or a task to access a call report.
2. Click **Create Call Report** or open an existing Call Report.
3. Select an account.
4. Select an address related to the account from the Addresses section.
5. Click **Save and Close**.

#### *Related Topics*

- [Let Salespeople Associate Addresses with Activities](#)

## Use Activity Subtype

Track the activities by type and subtype. For example, you can track an email activity using its subtypes, outbound and inbound.

Use the Type field to:

- Categorize your activity types by selecting values in the Type field on the activity create and edit pages.
- Search for activities based on type.
- View and sort activities by type.
- Update values on the Activities list page using the click-to-edit functionality.

## Apply Mass Update to Activities

You can select multiple activity records and update all of them to the same value for a field using the mass update feature.

Among the fields that you can update are:

- Due Date
- Owner
- Priority
- Status
- Type

**Note:** Your administrator must enable this feature before it's available in the application.

## Steps to Apply Mass Update

Here's how to update several fields on multiple activities at once:

1. Navigate to the **Activities** landing page.
2. Search for the records you want to update.
3. Click **Update** from the **Actions** menu.
4. Select the records that you want to update and click the **Update** button.
5. Select the fields and assign or enter values for them. Keep in mind:
  - o If you want to update a field that has a parent field, then the value of the parent field must be the same across all child records selected for mass update.
  - o You can't apply mass update to conditionally updatable fields.
6. When you're done making updates click **Submit**.

### Related Topics

- [How do I enable mass update of records?](#)

## Activity Search and Lists

### Overview of Creating Lists

You can refine your list of activities by creating lists from Activities using Saved Search in the Advanced Search pane. For example, you can create a list of all completed tasks you own.

A date range is required when using the Saved Search list. The available **Show** filters are Open, All, and Completed.

Show Filter	Description
Open	Displays all appointments that have a start date of today or in the future within defined date range, all open tasks with a due date in the defined date range, and open tasks with no due date.
All	Displays all appointments within the defined date range, open tasks with no due date or with a due date within the defined date range, and closed tasks with an end date in the defined date range.
Completed	Displays appointments in the past with a start date that falls within the defined date range, and tasks having been completed within the defined date range.

## Use the Show Filter in Activities

Use the Show filter in activities when you want to:

- Create saved searches for activities.
- Search for activities in associated objects, such as opportunities or accounts.

When the Show filter is set to All or Completed, the sort order displays your future activities first, followed by the historic activities. To view future activities:

1. Sign in to the application as a sales representative.
2. Navigate to **Sales > Activities**.  
The My Calendar page appears.
3. Click the **Activities** subtab.  
The Activities landing page appears.
4. Click the **Show Advanced Search** icon.  
The Advanced Search pane appears.
5. In the Advanced Search pane, select **My Open Activities** from the Saved Search drop-down list.
6. Select **Complete** or **All** from the Show field.

A list of all the future appointments and open tasks appears.

## Create Your Own Activity Lists

You can create your own list of activities. For creating your own lists you must set your search criteria and save the list. You can view your list in the List field.

Here's how you can create your own lists:

1. Sign in as a sales representative.
2. On the home page, click **Sales > Activities**.  
The My Calendar page appears.
3. Click the **Activities** subtab.  
The Activities landing page appears.
4. Click the **Show Advanced Search** icon.  
The Advanced Search pane appears.
5. In the Advanced Search pane, select **I Own** in the Record Set field.
6. Click **Save**.  
The Create Saved Search dialog box appears.
7. Name the list.
8. Click the **Run Automatically** check box, and click **OK**.
9. View the list in the Saved Search field.

# Activity Notifications

## Overview of Activity Notifications

Activities generate notifications when you perform various tasks or make certain updates. Notifications are sent by email or on a global notification list (also called a bell notification list). Let's take a look at how the notification process works.

### When Notifications Are Sent

Email and bell notifications are triggered when a change is saved. Notifications can be sent when an appointment or task is created, updated, or deleted. You can also send notifications as a reminder for appointments. You can choose whether to receive email, a notification in the notifications list, or both.

**Note:** For updates, notifications are triggered on any update except settings and values specific to an individual user. For example, notifications are triggered by:

- Show Time As
- Reminder
- Response

Notification messages are displayed only on the bell notification list. The messages aren't displayed in the Worklist for notifications and approvals.

### Set Your Notification Preferences

To set your notification preferences, go to **Settings and Actions** under your user name in the global header and select **Set Preferences**. See [Use Notifications to Drill Down to Records](#) for more information.

## Use Notifications to Drill Down to Records

You can opt in to use the capability to drill down and act from activity notifications and receive notifications through notification lists and email.

If you opt in to receive notifications, then list and email notifications are generated when you create or update appointments and tasks. Each notification includes a link that you can drill down on to view the record details before you approve or reject the request. You can accept or decline appointments and complete tasks from notifications. You can decide whether to use the enhanced notifications with drill-down capability or continue to use the earlier option with no drill-down capabilities.

To receive notifications, you must set a preference in your Preferences page. See the section in this topic, Set the Preference to Receive Notifications, for more information. After you opt in, you receive two types of notifications: Action Required and FYI. In the Pending Notifications window, you can act on each notification by clicking Accept or Decline.



Appointments and tasks have the following set of fields that appear by default in the email notifications:

- Task
- Due Date
- Owner
- Status
- Assigned to

Each appointment notification has the following default fields:

- Subject
- Date
- Location
- Invitees

In addition, all email notifications include the following fields, if they're defined on an activity.

- Account
- Opportunity
- Lead
- Asset
- Description

To drill down into an activity, click the subject or task link in the appointment notification. You can also accept or decline an appointment or complete a task from the email notification.

## Set the Preference to Receive Notifications

Here's how you can receive notifications by email and lists.

1. Sign in as a sales representative.
2. Click **Setting and Actions** > **Set Preferences** in the global header.
3. Click **Calendar and Appointment Preferences**.

The Calendar and Activity page appears.

4. In the Appointments and Task sections, select the **Notify me by** check box.

5. Click **Save**.

# Activities and Assets

## Overview of Integrating Assets with Activities

After the administrator enables the functionality, you can associate assets with activities, including appointments, call reports, and tasks.

Associating an asset with an activity and then viewing the asset calendar helps you manage your appointments. You can view all the related appointments for an asset in a single place. After you or someone else in your organization associates an asset with an appointment, then the asset calendar is enabled.

### *Related Topics*

- [Overview of Asset Calendars](#)

## Add Assets to Activities

If the functionality is enabled by the administrator, you can add assets to all types of activities, including appointments, call reports, and tasks. You can add assets to new and existing activities, using the activity create and edit pages.

After you add an asset to an activity, then you can view the asset on that activity's page.

After an asset is associated with an appointment, you can view the asset calendar from the Manage My Calendar window available on the My Calendar page. For more information, see the related topics.

To add an asset to an appointment:

1. Access the activity page where the Assets list is enabled. For example, click **Create Appointment** in the My Calendar page.
2. Click **Search** in the Asset drop-down list.

The Select: Asset page appears.

3. Click **Search**.

The search results appear.

4. In the search results, select an asset and click **OK**.

The Create Appointment page appears.

5. The asset number and asset serial number of the selected asset, if available, are automatically populated.
6. Click **Save and Continue** in the Create Appointment page.

The asset appears as a link.

7. Click **Save and Close**.

## Overview of Asset Calendars

Use your calendar to manage assets. An asset calendar displays the appointments relevant to your assets. Team members view all upcoming appointments related to an asset in the calendar and coordinate their activities for the asset.

You can create an asset calendar for:

- Assets that you can access
- One asset at a time

The asset calendar displays all appointments for the asset and private appointments. The asset calendar identifies the owners of the appointment with a picture or icon with the user initials or name. With the asset calendar you can:

- View all appointments related to an asset in a single calendar view.
- View all the owners of appointments related to an asset.
- Hide or show appointments of individual or multiple appointment owners.
- Save asset calendars to a list and access the calendar that you want.
- Determine the owner of each appointment on the calendar.
- Switch between all calendar views: day, week, month, and agenda.

## Create an Asset Calendar View

An asset calendar displays the appointments relevant to your assets. After an appointment is associated with an asset, you can create an asset calendar view from the My Calendar page.

The asset calendar is available to the whole organization as soon as one person across an organization associates an appointment with an asset.

The asset calendar displays:

- All appointments that are associated with an asset.
- All owners of appointments associated with an asset. The appointments can be owned by different people.

Here's how you can create an asset calendar view:

1. Click the **Manage My Calendar** icon on the My Calendar page.
2. Click **Other Calendars**.
3. Click **Create Asset Calendar View**.

The Create Asset Calendar page appears.

**Tip:** Remember, an asset calendar can only be enabled after an appointment is associated with an asset.

4. Click **Search** in the Asset field.  
The Select: Asset page appears.
5. Search for and select an asset. Alternatively, you can create an asset to use.
6. Click **OK**.

The name of the asset is automatically populated as the calendar name, but you can change it if needed.

**7. Save your changes.**

You can access the asset calendar from the My Calendar page by clicking **Manage My Calendar > Other Calendars**. You can filter the calendar to view appointments associated with a particular owner.

*Related Topics*

- [Overview of Sales Assets](#)

## Activities and Interactions

### What activities can I do from the Interactions History subtab?

You can track and view interactions if your sales administrator has enabled you to log interactions and has enabled the Interactions History subtab on object pages such as Activity, Account, Lead, or Opportunity.

From the **Interactions History** subtab you can log interactions using the:

- **Log an Interaction** button  
Interactions include phone calls, web conferences, or wrap up calls you had with your customers or prospects.
- **Log an email** button  
When logging an email, you can:
  - Add emails manually - You can't reply or forward the message content of the conversations saved in the Interactions History subtab.
  - Delete a manually-added email. - However, the emails that are shared from the add-in or those flowing in Digital Sales can't be deleted. You can modify a manually entered email message, but you can't see the email thread or modify an auto-captured email.

In addition, you can also use the Log an Interaction smart action from the Workspace action menus on all the relevant object pages of Workspace.

**Note:** Once log interactions is enabled for you, then you won't be able to log a call from activities or use the Log a Call smart action on the object pages of Workspace.

*Related Topics*

- [Log Interactions You Had with Customers](#)
- [Log Email Conversations Manually](#)

## Log Interactions You Had with Customers

If your administrator has enabled the Interactions History subtab on the object pages such as Account, Lead, or Opportunity, you can log your sales interaction details.

Interactions include phone calls, web conferences, or wrap up calls you had with your customers or prospects.

Here's how you log an interaction:

1. Navigate to an object details page such as an account, contact, opportunity, or lead.
2. Scroll down and click the Interactions History subtab.

You can see the interactions logged by your team.

3. Click **Log an Interaction**.
4. In the Interaction Wrap Up window, select the channel such as phone or web conference.
5. Enter the date, type of interaction, outcome, and notes related to the interaction.

Depending on the object page you're on, the account, lead, opportunity, or contact information is auto-filled. For example, if you're entering the details from the Contact page, contact name is auto-filled.

6. Click **Save**.
7. Click **Save and Close** on the object page.

## Log Email Conversations Manually

If you're using Microsoft 365 add-in or Digital Sales, the emails you send or receive are automatically saved as conversations. You can find them in the Interactions History subtab of your Fusion CX sales application.

In addition to the conversations that are automatically saved, you can also manually log emails.

Manually logged emails aren't threaded into conversations. They are saved as messages.

Here's how you log an email manually:

1. Navigate to an object details page such as an account, contact, opportunity, or lead.
2. Scroll down and click the Interactions History subtab.

**Note:** You can see the Interactions History subtab only if administrator has enabled it for the object pages.

On the Interactions History subtab, you see the conversations that were manually-logged by your team or shared from the add-in.

3. Click **Log an Email**.
4. In the Email window, select the date when the email was sent and type of interaction.
5. Enter email address of the recipients in the To and CC fields.
6. Enter the subject of the email, and the account, contact, lead, and opportunity associated with the recipient.
7. Click **Save**.
8. Click **Save and Close** on the object page.

## FAQs for Activities and Calendars

### Frequently Asked Questions (FAQs) for Activities and Calendars

This section contains some frequently asked questions (FAQs) for activities (calendars, tasks, call reports). Scroll or search to find answers to common questions.

## What activities does selecting My Open Activities display?

When you select the My Open Activities list in the Activities work area, the application displays a list of all of the future appointments and open tasks where you're listed as a resource.

You're automatically a resource if you created the activity or you can be assigned as a resource by another resource or an automated process.

## What activity records do the different record sets permit you to search?

The different record sets in the Saved Searches window restrict your saved searches to different sets of activities. 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 you and your subordinates own. Or restrict your searches to a smaller geographical area. For example, search all the activities in one state instead of the whole country.

Here's a list of the record sets for activities. Not all record sets are available to all users. For example, the record set involving subordinates is available only to managers.

Record Set Name	Description
I own	Activities you either created or ownership was assigned to you.
I am a resource	Activities where you're a resource.
My subordinates own	Activities owned by you and your subordinates.
All records I can see	Activities that you can view based on your resource team membership, sales territory assignments, your position in the organization, and security permissions.  This record set is available only if the administrator enables it using a profile option.

## How can I search all activity records?

In the Activities landing page, you use the Find field to search all activities you're associated with.

To broaden the search to all activities, use the advanced search and select the record set you want to see. Your administrator must enable this feature for you to search all activities, including those you don't own or aren't associated with.

*Related Topics*

- [Enable the Search of All Activities](#)

## How does the Show filter refine my activity list?

The Show filter displays activities based on certain criteria. Here's a list of the show filter criteria for activities:

Show Filter	Tasks	Appointments
Open	All open tasks with a due date in the defined date range, and open tasks with no due date	All appointments that have a start date of today or in the future within a defined date range
All	Open tasks with no due date or with a due date within the defined date range. Closed tasks with an end date in the defined date range	Open tasks with no due date or with a due date within the defined date range. Closed tasks with an end date in the defined date range
Completed	Tasks that are completed within the defined date range	Appointments in the past with a start date that falls within the defined date range

## How can I view activities that are set as private?

You can only view activities that are set as private if you're the owner of the activity, are delegated by other users to view it, or are a resource or contact of the activity.

**Tip:** The Private check box is hidden by default in the tasks pages. Administrators can use Application Composer to display the check box on the Create Appointment page and enable you to set a task as private.

## How can I track customer-facing activities?

You can define your own criteria for an interaction using the Activities feature. Customer interactions are logged either as completed tasks or as appointments using the activity types you want to report on.

To track your customer-facing interactions, generate a report to retrieve activities of a specific type with accounts or contacts associated. For example, you can list all calls with an associated contact. To track a completed task, go to the Activities page from the Customer, Opportunity, or Lead page, and click Log a Call.

## How can I view my appointment in a different time zone?

You can use the time zone drop-down list to view the appointment time in a different time zone. The time zone for users is defined in the Regional area within Set Preferences.

If no time zone is defined, the appointment time zone displays as null, and appointments are created based on Universal Time Coordinated (UTC) time. You can't change the default time zone.

When appointments include attendees from a different region, the appointment time zone drop-down list can be used to define an attendee-friendly time. For example, a user in Chicago selects 9 A.M., and sets the time zone to Cairo, Egypt time zone. Upon saving, the appointment displays to the Chicago user as 2 A.M., and the time zone drop-down list has the Chicago value.

## Can my administrator view and edit my appointments?

Your administrator can view and edit your calendar appointments by enabling a profile option. You can also enable other sales users to view your calendar in the Preferences screens.

If you want others to view your appointments, make sure you don't set them to private, or no one except you can see them.

To learn how to set the visibility for other sales users, see the topic, [Make Your Calendar Appointments Visible to Others](#), in this chapter.

For administrator instructions about the profile option, see the related topic.

### *Related Topics*

- [View and Edit Calendar Appointments of Users](#)

## What's the difference between a task, a call report, and an appointment?

A task is a unit of work to be completed by one or more people. Tasks are related to business objects such as opportunities or contacts, and can include attachments.

An appointment is a calendar entry related to a business object, such as an opportunity or a customer. Appointments can include attachments.

A call report provides a historical view of all communications initiated by you to a customer, or by a customer to you. Call reports don't document internal communications.



# 11 Business Plans

## Overview of Business Plans

Sales representatives and sales managers perform account planning to achieve specific goals. Goals for business plans are represented through objectives.



Watch video

Access to the business plans is determined by the team membership and resource reporting hierarchy. This means that managers have access to business plans of the sales representatives in their team. In an account business plan, salespeople collaborate to discuss the sales of a specific account and analyze the need of a plan. An account business plan focuses on a specific account, to increase the sales or revenue of that account. With a business plan you can:

- Analyze the strengths, weaknesses, opportunities, and threats of the business plan in the context of the account.
- Add business plan classes to define plans for partner, account, opportunities, and contacts.
- Collaborate with team members to discuss prospective plans.
- Enable or disable any of the embedded classes for account and partner business plans.
- Add team members to work on a business plan to share information, identify objectives, and increase sales per quarter.
- Create notes while working on a business plan and continue with discussions in the next meeting referring to the notes created.

Make sure that your administrator has enabled the account business plan using Application Composer.

### Related Topics

- [Create Business Plans](#)
- [Add Business Plan Objectives](#)

## Create Business Plans

You create a business plan by selecting a type of plan and then adding objectives to it. The type of a business plan helps you to differentiate between business plans. The types you can create are: partner and account.

The procedure to create a business plan is the same for both partner and account. These steps represent a flow for creating an account business plan:

1. Sign in to the sales application as a sales manager.
2. Click the **Business Plan** icon on the home page.  
A list of business plans appears.
3. Click **Create Business Plan**.

4. Enter the name of the plan.
5. Select an account from the Account drop-down list.
6. Define the period for the objectives that you want to achieve, in the Period field.  
By default, the current year is displayed. You can change the period to year, quarter, or period.
7. Select a type from the options Regional and Global.  
The current user is the owner, by default.
8. Select a status for the plan. Initially, the status is Draft.
9. Click **Save and Continue**.  
You automatically navigate to the Edit Business Plan page.
10. Modify your business plans if required, and click **Save and Continue**.
11. Click the **SWOT Analysis** subtab to analyze the strength and weakness of your business plan.
12. Click the **Activities** subtab to add tasks to your plans.
13. Click **Save and Close**.

## Add Business Plan Objectives

Objectives are the key aspect of a business plan. Salespeople use business plans to achieve objectives to meet the target goals.

To create objectives for a business plan:

1. Click **Create Objective** on the Edit Business Plan page.  
The Create Objective page appears.
2. Enter a name for the business plan.
3. Select a type from the Type drop-down list.  
**Note:** You can add a type to the list of options. The type of a business plan determines the unit of measure and the field is automatically populated on selection of a type.
4. Define the period in which you want to achieve your goals for the business plan.
5. Enter your target to achieve your objective in the defined period.
6. Click **Save and Close**.  
The objective is displayed on the Edit Business Plan page.
7. If you click **Save and Continue**, then the Edit Objective page appears.  
You can view the newly created objective and you can add notes, activities, and attachments to the objective.

## Split Objectives

You can split an objective to specify how to achieve the objective between partner and account. To split an objective:

1. Click **Split Objective** on the Edit Objective page.  
The Split Objective page appears.
2. Specify how you want to split your objective.
3. Click **Save and Close**.

The split objective appears on the Edit Objective page.

4. Enter your plan to achieve your set target, in the specified period.
5. Select **Attainment** in the Show field.

The Attainment column appears.

6. Enter the details for the targets you achieved.
7. Click **Save and Close**.

## Use the Business Plans Summary Tab

You view the list of business plan objectives on the Edit Business Plan: Summary page, or on a separate subtab named Objectives (depending on how the application is configured).

If an objective is listed in the Objectives subtab, you can search for objectives by name. For every objective you must specify the following fields:

Fields	Description
Split	Enables you to define dimensions for objectives.
Name	Displays the name of the account.
Type	Specifies the account type. The options are amount and quantity.
Unit of Measure	By default, the measure is determined by the type of account that you select.
Period	Defines the period to achieve the objective.
Target	Specify the amount or quantity to achieve the objective.

Objectives

<a href="#">Create Objective</a>					
Split	Name	Type	Unit of Measure	Period	Target
	BICA_PRM_BusinessPlan_CSM_Revenue Target	Amount	Amount	2017-Q1 - 2017-Q4	£10,000,000
	BICA_PRM_BusinessPlan_CSM_Target Number of Customers	Quantity	Quantity	2017-Q1 - 2017-Q4	25,000

## Business Plan Team Members

### Collaborate on Business Plans Using Microsoft Teams

Create a Microsoft Team with your business plan team members and collaborate with them for pursuing business plans.

## Who can Create a Team

You must be the business plan owner and a Microsoft Teams user to create a team in Microsoft Teams. You will be owning the team created in Microsoft Teams.

**Note:** You can create only one team per business plan.

## Who can be the Team Members

You can add any individual who is part of the Business plan resource team and is a Microsoft Teams user. To map a CX Sales user to the user account in Microsoft Teams, the user's primary email address in their resource profile in the sales application must match the user's email address in Microsoft Teams.

Management resources can't be added to the team.

**Note:** In Microsoft Teams, the teams can be public or private. Teams created from a business plan in CX Sales are always private teams, which implies that only the team members can access the team.

## Create the Team in Microsoft Teams

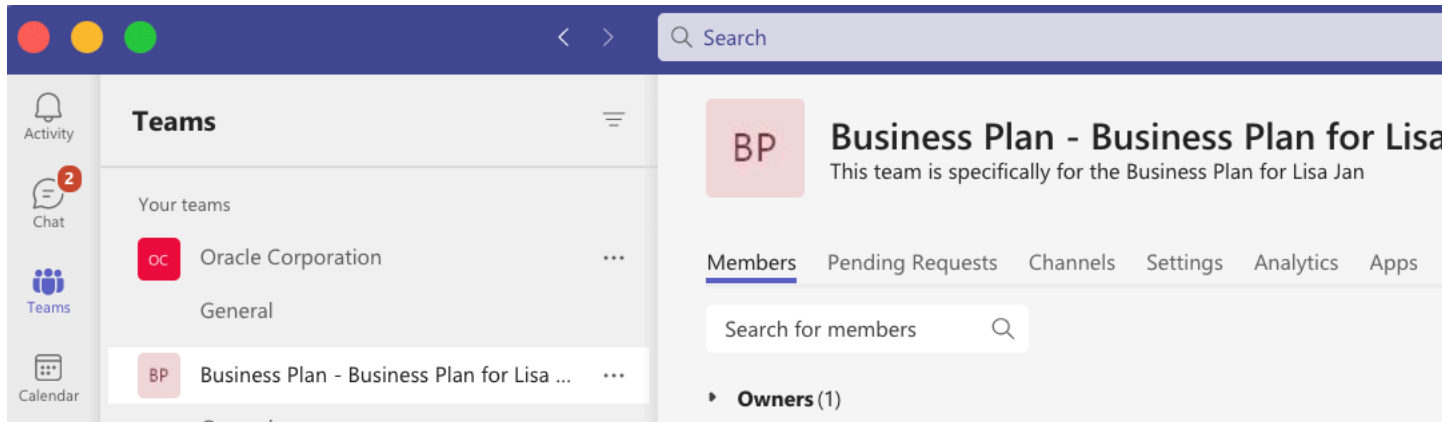
1. From the navigator, go to **Business Plans > Business Plans**.
2. Open a business plan you own. Ensure that your business plan has team members.
3. On the Edit Business Plan page, click **Actions** and select **Create Team in Microsoft Teams**. Here's a screenshot that shows the Create Team in Microsoft Teams option from the Business Plan Actions menu.



After a team is created in Microsoft Teams, the **Create Team in Microsoft Teams** action automatically changes to **Go to Microsoft Teams** action.

4. From **Actions**, click **Go to Microsoft Teams**.

You're navigated to the newly created teams page in Microsoft Teams. Here's a screenshot that shows a sample team created in Microsoft Teams for the business plan.



*Related Topics*

- [Set Up Microsoft Teams for Sales](#)

## Re-create a Team for a Business Plan Team in Microsoft Teams

When you create a business plan team from your sales application, the **Create Team in Microsoft Teams** action on the Edit Business Plan page Actions list automatically changes to the **Go to Microsoft Teams** action.

If for some reason, the original team no longer exists in Microsoft Teams, the Go to Microsoft Teams action triggers re-creation of the team and saves it to the business plan. When you click the action again, it automatically opens the new team created in Microsoft Teams.

This allows salespeople to continue to collaborate with each other on the reopened business plan.



# 12 Assets

## Overview of Sales Assets

Assets are high-net-worth products owned by an organization. After the functionality is enabled by the administrator, you can create and manage assets.

You use assets in the following ways:

- 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

## What assets records can I search using saved searches?

You can view different records from the two saved searches provided on the Assets landing page.

Here's a list of the supplied saved search for assets.

Record Set Name	Description
My Customers' Active Assets	All active assets associated with your customers
All My Customers' Assets	All assets, purchased in the last six months, associated with your customers (although the time frame can be modified by the administrator)

## How can I view assets?

You can view asset information for your accounts from the Assets or Accounts page.

Here's how to view assets from the Assets page.

1. Sign in to a sales application as a sales manager.
2. Click **Sales > Assets** on the home page.
3. On the Assets landing page, view the summary details.
4. Click an asset record to view and edit the asset details.

Here's how to view assets from the Accounts page.

1. Sign in to a sales application as a sales manager.
2. Click **Sales > Accounts** on the home page.

The Accounts landing page appears with a list of accounts.

3. Click an account.

The Edit Account page appears.

4. Click the **Assets** subtab.

If enabled by the administrator, you can also view asset information in activities, such as appointments, tasks, and call reports.

#### Related Topics

- [Overview of Sales Assets](#)
- [How can I edit assets?](#)
- [How can I create assets?](#)
- [How can I delete assets?](#)
- [Export Assets](#)

## How can I create assets?

You can create asset information for your accounts.

To create assets from the Assets page:

1. Sign in to a sales application as a sales manager.
2. Click **Sales > Assets** on the home page.
3. In the Assets landing page, click **Create Asset**.
4. Enter the details, such as the account, product, currency, status, quantity, and purchase unit price.

Based on the currency, **Exchange Rate** is shown. Similarly, Based on the quantity and purchase unit price of the asset, **Total Asset Amount** is calculated.

**Note:** For you to see the Exchange Rate and Total Asset Amount fields on the UI, your administrator must enable them on the Create and Edit layouts for Assets.

5. Click **Save and Close**.

To create assets from the Accounts page:

1. Sign in to a sales application as a sales manager.
2. Click **Sales > Accounts** on the home page.
3. In the Accounts landing page, edit an account.
4. In the edit page, click the **Assets** tab.
5. Click **Create Asset** and enter the details.
6. Click **Save and Close**.



### Related Topics

- [Overview of Sales Assets](#)
- [How can I view assets?](#)
- [How can I edit assets?](#)
- [How can I delete assets?](#)
- [Export Assets](#)

## How can I edit assets?

You can edit asset information for your accounts from the Assets or accounts page.

To edit the assets from the Assets page:

1. Sign in to a sales application as a sales manager.
2. Click **Sales > Assets** on the home page.
3. In the Assets landing page, select an asset to edit.
4. In the Edit Asset page, you can edit the asset information, such as owner, as well as details like status, quantity, and purchase price.
5. Save your changes.

To edit the assets from the Accounts page:

1. Sign in to a sales application as a sales manager.
2. Click **Sales > Accounts** on the home page.
3. In the Accounts landing page, edit an account.
4. In the edit page, click the **Assets** tab.
5. Select an asset to edit and edit the details.
6. Save your changes.

### Related Topics

- [Overview of Sales Assets](#)
- [How can I view assets?](#)
- [How can I create assets?](#)
- [How can I delete assets?](#)
- [Export Assets](#)

## How can I delete assets?

You can delete asset information for your accounts from the Accounts landing page or the Assets landing page.

To delete assets from the Assets landing page:

1. Navigate to **Sales > Assets** on the springboard.

2. In the Assets landing page, select an asset.
3. In the Edit Asset page, select **Delete Asset** from the Actions menu.
4. Respond to the confirmation message.

To delete assets from the Accounts landing page:

1. Navigate to **Sales > Accounts** on the springboard.
2. In the Accounts landing page, edit an account.
3. In the Edit page, click the **Assets** tab.
4. Select an asset to delete.
5. In the Edit Asset page, select **Delete Asset** from the Actions menu.
6. Respond to the confirmation message.

#### Related Topics

- [Overview of Sales Assets](#)
- [How can I view assets?](#)
- [How can I edit assets?](#)
- [How can I create assets?](#)
- [Export Assets](#)

## Apply Mass Update to Assets

You can use the mass update feature to update multiple fields on several asset records at once, without having to go into each individual record.

Among the fields that you can update are:

- Asset Owner
- Status
- Quantity
- Purchase Date

**Note:** Your administrator must enable this feature before it's available in the application.

## Steps to Apply Mass Update

Here's how to update several fields on multiple assets at once:

1. Navigate to the **Assets** landing page.
2. Search for the records you want to update.
3. Click **Update** from the **Actions** menu.
4. Select the records that you want to update and click the **Update** button.
5. Select the fields and assign or enter values for them. Keep in mind:
  - If you want to update a field that has a parent field, then the value of the parent field must be the same across all child records selected for mass update.

- You can't apply mass update to conditionally updatable fields.
- 6. When you're done making updates click **Submit**.

*Related Topics*

- [How do I enable mass update of records?](#)

## Export Assets

You can export a list of assets from the application. When you export assets, the application generates a spreadsheet file that you can save locally.

To export assets, from the Assets landing page, click **Export List** in the Actions menu.

*Related Topics*

- [Overview of Sales Assets](#)
- [How can I view assets?](#)
- [How can I edit assets?](#)
- [How can I delete assets?](#)
- [How can I create assets?](#)



# 13 Marketing Content

## 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*

- [About Campaign Management Reports](#)
- [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

You can view predefined campaign-related reports and charts to determine the effectiveness of your campaigns and evaluate how they're progressing and performing.

You can also create your own specific Campaign reports and charts using the Campaign and Campaign Member subject areas to suit your business needs.

The following subject areas enable the creation of reports on the Marketing Cloud and your sales application data.

- Campaign Members
- Campaign Opportunities

For example, sales and marketing operations can run campaign related reports and perform analysis on marketing attribution and evaluate a campaign's return on investment (ROI). The Profile link on the View Campaign shows some details about the campaign such as name, type and current status of the campaign. It also shows the owner, and the dates when the campaign started and ended as well as a brief description and costs of the campaign. Your administrator can use Application Composer to expose or hide such details or change the layout of the fields as they appear in the Profile page.

The Campaign Analytics subtab on the View Campaign page shows the campaign member dashboard. Your administrator can use Application Composer to expose a Campaign ROI dashboard from the Campaign List page.

Access these reports by clicking the Campaign ROI Analytics link from the Campaign List page.

Report	Access this report to...
Campaign ROI Analysis	<ul style="list-style-type: none"> <li>• Determine how each of your campaigns are performing.</li> <li>• Measure the effectiveness of the campaign by calculating the return on investment (ROI) and average costs for your campaigns.</li> </ul> <p>The Actual ROI is represented as a percentage (total opportunity revenue minus the actual cost divided by the actual cost).</p> <ul style="list-style-type: none"> <li>• View the pipeline ROI calculated as a percentage (total revenue on open opportunities minus the actual cost divided by the actual cost).</li> <li>• Filter the report data by campaigns with start date in the last 180 days.</li> </ul> <p>Other time filter criteria include last quarter, last two quarters, and last year. You can set your own time period to run this report.</p>
Campaign Revenue	<ul style="list-style-type: none"> <li>• Measures the total revenue of successful campaigns that are tied to won opportunities.</li> <li>• Analyze which won opportunities have resulted from which campaigns.</li> <li>• Filter the report data by campaigns with the default start date in the last 180 days.</li> </ul>

Report	Access this report to...
	Other time filter criteria include last quarter, last two quarters, and last year. You can set your own time period for which to run this report.
Top Campaigns	<ul style="list-style-type: none"> <li>Displays the top 20 campaigns having the highest ROI in the last six months.</li> <li>View the total revenue won opportunities value for each of the campaigns.</li> </ul>

*Related Topics*

- [Overview of Campaign Management and Reporting](#)

## Add Leads and Contacts to Marketing Campaigns

You can include contacts and leads created from your sales application as campaign members to your marketing campaigns created and updated in Oracle Eloqua. After the added campaign members are synchronized to Oracle Eloqua, they get added to the specified marketing campaigns.

Add contacts or leads as campaign members to marketing campaigns from these locations within your sales application:

- Campaigns subtab on the Edit Lead page
- Campaigns subtab on the Edit Contact page
- Campaign Members subtab on the View Campaign page

**Note:** These subtabs are hidden by default but your administrator can make them available to you through Application Composer. See the related topics for more information.

### Add a Lead or a Contact to Campaigns

From the **Campaigns** subtab in your Edit Lead and Edit Contact pages, you can add a lead or contact that you want to an existing marketing campaign as campaign members. Once you click **Add to Campaign** you select the specific campaigns to where your leads or contacts are added.

Here's an example of how to add a lead to a marketing campaign from the Edit Lead UI:

1. Sign in as a sales representative or a sales manager.
2. Navigate to **Sales > Leads** to go to the Leads work area.
3. Select a lead that you want to add as a campaign member to a marketing campaign.
4. From the Edit Lead page, click the **Campaigns** subtab.
5. Click **Add to Campaign** to go to the **Add: Campaigns** screen.
6. Search for and select the existing marketing campaigns that you want.
7. Click **Apply** and then click **OK**.

The selected lead is now included as a campaign member in your selected marketing campaigns.

To add a contact to a marketing campaign, go to the **Sales > Contacts** work area and follow similar steps. From the Edit Contact page, click **Add to Campaign** and select the specific campaigns to where you want your contact added as a campaign member.

## Add Leads and Contacts to a Campaign

When you have added the marketing campaigns that you want, you can view and access them from the Campaign Members subtab on the Campaign Details page.

From here, you can add additional campaign members (leads and contacts) as follows:

1. Navigate to the **Campaigns** work area.
2. From the View Campaign: Overview page, select and open a campaign that you want to add additional leads and contacts.
3. Click the **Campaign Members** subtab.
4. Click **Add Contacts** to go to the **Add: Contacts** screen.
5. Search for and select the contacts that you want to add to your existing marketing campaign as campaign members.
6. Click **Apply** and then click **OK**.

**Note:** You can't remove contacts from a campaign once the campaign is activated.

The selected contacts are now included as campaign members to your selected marketing campaigns.

Similarly, if you want to add additional leads as campaign members to an existing marketing campaign, click **Add Leads** to go to the **Add: Leads** screen and follow similar steps.

## Associate Campaigns with Leads and Opportunities

You can determine the effectiveness of your campaigns by associating and selecting campaigns for both leads and opportunities. For example, you might want to know which campaigns have influenced the lead and contributed towards the sales pipeline.

You can now associate one or more campaigns with lead and opportunity records in your sales application. You can also mark one of the associated campaigns as your primary campaign for a specific lead or opportunity. When you convert a lead to an opportunity, the campaign associations and the primary campaign check box is preserved on the converted opportunity.

1. From the **Campaigns** list page, select the campaign you want.
2. From the Campaign Members subtab, click **Add Leads** to add leads as campaign members to the selected campaign. After the added campaign members are synchronized to Oracle Eloqua, they get added to the specified marketing campaigns.

**Note:** You can't remove leads from a campaign once the campaign is activated.



3. Navigate to edit the associated lead page and the selected campaign is displayed as your **Primary Campaign** as

The screenshot shows the 'Edit Lead: LeadDemoTest: Summary' page. The 'Primary Campaign' field is highlighted with a red box and contains the text 'Primary Campaign CX\_SA\_BS\_ELQ\_CAMPAIGN1 X'. Other fields include 'Existing Contact', 'Lead Name', 'Job Title', 'Existing Account', 'Product Type', 'Primary Product', 'Contact Phone', 'Contact Email', 'Attachments', 'Description', 'Contact Address', 'Country', 'Address Line 1', 'Status', 'Source', 'Campaign', 'Owner', 'Currency', 'Deal Size', 'Score', 'Rank', 'City', and 'State'.

shown here:

4. From the **Actions** menu, select **Convert** to convert the lead to an opportunity.

After the successful conversion, the campaign associations and the primary campaign check box is preserved on the converted opportunity.

5. Use the **Campaigns** subtab to view a summary page of the associated leads and opportunities with the **Primary** campaign highlighted as shown in this Edit Opportunity page example.

The screenshot shows the 'Edit Opportunity: LeadDemoTest: Campaigns' page. The 'Campaigns' subtab is selected. The table below shows the associated campaigns:

Primary	Campaign Name	Type	Start Date	End Date	Last Updated Date	Status
<input checked="" type="checkbox"/>	CX_SA_BS_ELQ_CAMPAIGN1	Event	7/27/21	9/1/22	2/7/22	Scheduled
<input type="checkbox"/>	CX_SA_BS_ELQ_CAMPAIGN2	Webinar	2/27/21	12/31/22	2/7/22	Draft

## FAQs for Marketing Content

### Frequently Asked Questions (FAQs) for Marketing Content and Campaigns

This section contains some frequently asked questions (FAQs) for marketing content and campaigns. Scroll or search to find answers to common questions.

#### How can I view the amount of responses for a campaign?

From the Campaigns List page, you can drill down into each campaign record to view campaign members that have responded to a given campaign, and view campaign member details.

In addition, you can view campaign details including campaign name, start and end dates, status, and other standard or custom attributes. The total number responding to a campaign represents the total count of campaign members with a status of **Responded**. Note that the response is only counted once even when a campaign member has responded multiple times to the same campaign.

#### How many campaign members are associated with a campaign?

From the Campaigns List page, you can drill down into each campaign record to view campaign members that have responded to a given campaign.

You can also access the Campaign Members report that shows the amount of members in a campaign from the **Campaign Analytics** subtab on the **View Campaign** summary page. You can filter the report data by lead or contact name and response date range.

Your application administrator can filter what user-defined or predefined campaign related reports to display to campaign users. For example, the default Campaign Analytics subtab search filter is **Record Set = All Members**. This search returns all campaign members with a status of **Responded and Sent**.

#### How can I ensure Opportunity amounts get displayed in Marketing Campaigns?

You can use the View Campaign summary page to view associated leads, contacts, opportunities, and revenue amounts.

To ensure that opportunities and revenue amounts are visible in your Campaigns UI, you must:

- Convert the lead to an opportunity after you associate it to the campaign
- Correctly map the lead attributes to the newly created opportunity

For more information about mapping attributes, see the related topic [Attribute Mapping When Converting Leads to Opportunities](#) in the Implementation Reference guide.

## What happens to existing campaigns if I update the campaign template?

Existing campaigns that were created from the template are unaffected. Your changes will only affect campaigns created after the template is updated.

Campaign templates provide models to use as a basis when planning and designing campaigns. When you use a template to create a marketing campaign, the template values are copied to the new campaign and the template's purpose then ends for that campaign.

## What's the difference between a predefined list and a subscription list?

A predefined list is a static list of contacts.

A subscription list is another type of static list. When associated with a specific treatment that has subscription response forms included in the treatment content, it will reflect the responses of campaign recipients who choose to subscribe.



# 14 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](#)

## Lead Processing

### Overview of Lead Processing

Lead data is generated from a variety of sources and goes through further enrichment based on updates and follow-up activities. Lead quality must be assessed periodically so that leads are distributed to the right salesperson to ensure timely lead follow up and closure.

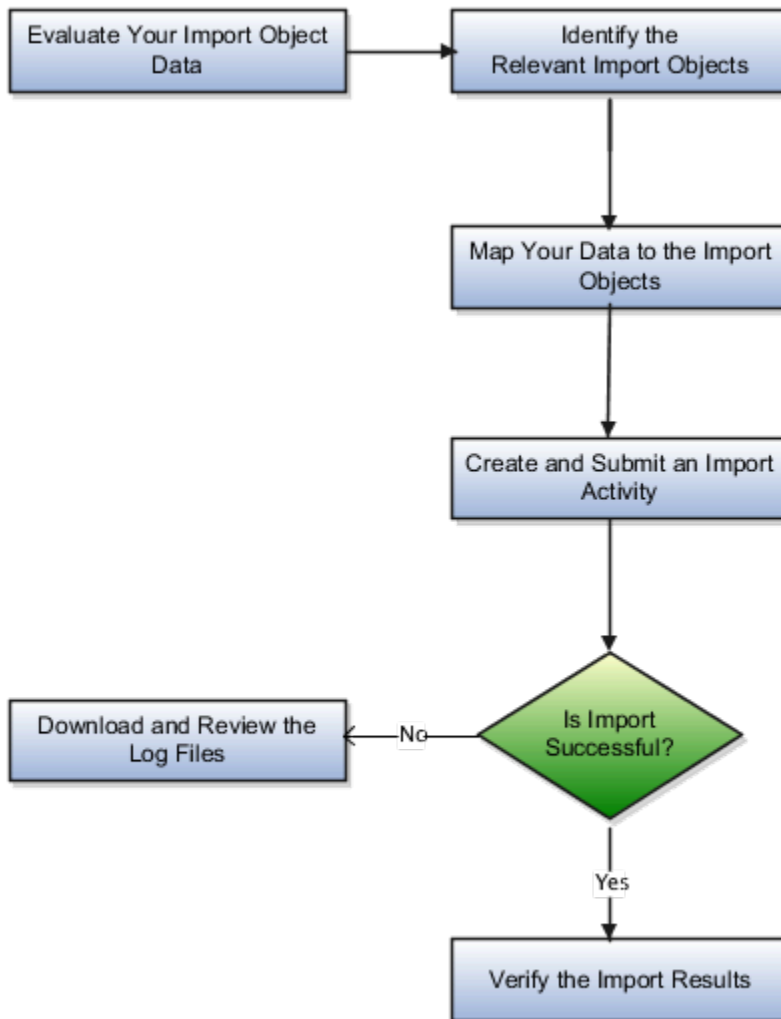
This section contains information about how to import lead data from an external data source into your sales application using the Import Management feature.

### Overview of Import Process

This topic provides an overview of the components used to import data.

## Import Process Flow

The following figure explains the various stages in the import process:



1. Evaluate your import data.
2. Identify the relevant import objects.
3. Map your data to the import objects.
4. Create an import activity.
5. Verify the import results.

## Import Objects and Import Queue

You can find details about the attributes such as data type, length, and user key information for each object on the **Import Objects** tab. You can download the template for each import object by clicking the Download icon. You can

create a mapping either while creating an import or separately using the **Import Objects** tab. On the **Import Object Details** page, click the Display Name link for the object to navigate to the **Manage Mapping page**. On this page, you can create a new import mapping, upload a map, or manage an existing mapping.

The Import Queue tab lets you view the imports that are in various statuses, such as active, completed, or unsuccessful. You can further drill down into an import activity by clicking the import name link to view the status details.

## Application Composer and Custom Extensions

If you create additional attributes to an existing object or create custom objects in Application Composer, then these extensions are available for import and export once you publish your sandbox.

### Related Topics

- [Define Objects](#)

## Import Your Sales Lead Data

Use this topic to import Sales Lead data into Oracle Applications Cloud. You can use the import functionality to create, update, or delete Sales Lead records.

To import Sales Lead records, perform the following tasks:

1. Map your source sales lead 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.

Use the Contact time zone field to save the preferred time zone of a contact pursued on your sales 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 save the record history of a sales lead. The columns let you accurately report on sales leads that are imported from other systems.

Other sales lead management features help to align marketing and sales objectives from sales lead generation to sales lead execution. Sales Lead information is generated from a variety of sources and obtained from:

- A company's existing contacts
- Marketing campaigns

All sales leads then undergo the qualification and assessment process and are qualified either manually by a salesperson or automatically based on predefined rules. Finally, qualified sales leads are converted into opportunities.

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

To import your sales lead 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 must 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.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.

- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

To better manage your sales lead information, the sales lead object has the following child objects:

- Sales Lead Contact
- Sales Lead Product
- Sales Lead Resource

If you want to import only a few records, then you can create a single CSV file for all sales lead attributes. However if you want to import a large number of records, then you may decide to create multiple CSV files, one for each of the sales lead child objects. Note that you must have imported the CSV file for sales lead object successfully before trying to import the CSV files for the child objects. There are separate help topics describing how to import each of these child objects. For more information, see the related topics section.

## 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.
- You have all parent records in place before importing child records.

## Select a Unique Identifier for Your Records

To import data into Oracle Applications Cloud, your CSV file must include some specific attributes that enable the import process to uniquely identify the records. The file import process uses the attribute values to automatically map your source data to the target object attributes in Oracle Applications Cloud.

The preferred options to uniquely identify an object record are as follows:

- **Internal ID:** If you're identifying a record that already exists in Oracle Applications Cloud, then you can use the internal ID of the record, a system-generated unique identifier. Attributes with "id" in the attribute name are typically internal IDs. You can determine the internal ID of a record by exporting Oracle Applications Cloud object data, or by doing a transactional database query. Using an internal ID typically provides better performance and reduces the import duration. For the Sales Lead object, this attribute is `LeadId`.
- **Public unique identifiers:** If you're creating new records, then you can provide a user-friendly public unique identifier (attributes denoted with 'Number' and usually visible in the business object's UI). If you update a record for which you have previously provided a Number attribute, or for which a Number attribute is visible in the object's UI, you can use the Number attribute to identify the record. For the Sales Lead object, the attribute is `LeadNumber`.

## Required Attributes and Validations for Sales Lead Object

To import data successfully into Oracle Applications Cloud, your .csv file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for importing new Sales Lead records, required attributes for updating Sales Lead records, prerequisite setup tasks for the attributes, and specific validations, if any, for Sales Lead import:



Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead record	Updating an Existing Sales Lead record
AcceptedDate	The date the recommended lead generated by the Sales Prediction engine was accepted by a sales person or lead qualifier to pursue	No validation	A value is required if you specify the value for LeadAcceptedFlag as Y.	Not required
ActionCode	Indicates explicitly the operation to be performed on a row: INSERT to create a new record in the destination tables, UPDATE to update an existing record in the destination table, DELETE to delete the record.	If no value is provided, the record is updated if it already exists. Else, it's inserted	Not required	Not required
ConvertedTm	The date when the lead was converted to an opportunity	No validation	A value is required if you specify the value for Lead StatusCd as CONVERTED.	Not required
LeadName	The name that identifies the lead	No validation	A value is required if you're creating a new lead.	Not required
LeadNumber	The Lead's public unique identifier value	If providing a value to update an existing lead, the value must exist in the column LEAD_NUMBER of the MKL_LM_LEADS table.	If providing a value and creating a new lead, the value must be unique.	A value is required, if updating an existing lead and you're not providing the unique ID of the lead (ObjectKey)
ObjectKey	The unique ID for the existing lead record in the destination table	Automatically generated by the import process if creating new record. If updating an existing record and providing the LEAD_NUMBER, the import process defaults the LEAD_ID.	Do not provide a value if creating a new lead.	A value is required, if updating an existing lead and you're not providing the LeadNumber.
OwnerId	The unique ID for the existing resource party in the destination table. The owner must also be an internal resource included as a member of the lead's sales team	If providing a value, the value must exist in the column PARTY_ID of the HZ_PARTIES table, The value must also exist in the column PARTY_ID of the JTF_RS_RESOURCE_PROFILES table. The identified party must be assigned as a sales team resource for the existing lead or included in the resources imported in the same batch as this record.	A value is required, if creating a new lead and you don't provide the owner's source system code and reference (OwnerOrigSystem and OwnerOrigSystemReference)	Not required
QualifiedDate	The date when the lead was qualified	No validation	A value is required, if you optionally provide the lead	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead record	Updating an Existing Sales Lead record
			status (StatusCd) value as QUALIFIED, indicating that the lead is qualified.	
RejectedTm	The date when the lead was rejected	No validation	A value is required, if you optionally provide the lead registration status (ApprovalStatus) value as REJECTED, indicating that the lead is rejected.	Not required
RetiredTm	The date when the lead was retired	No validation	A value is required, if you optionally provide the lead status (StatusCd) value as RETIRED, indicating that the lead is retired.	Not required

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the sales lead object. The page also lists attribute information like type, length, description, and so on.

## Create the Source CSV File

You include the data that you want to import into 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 **Sales Lead** 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 sales lead 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 Sales Lead 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. 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.

### Related Topics

- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)
- [How do I import data?](#)

## Import Your Sales Lead Contact Data

You can use the Import Management to create, update, or delete sales lead contact records.

You can import sales lead contact records using these steps:

1. Map your source sales lead contact data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the sales lead contact data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

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

To import your sales lead contact 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 must 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.
- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

## 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.
- You have all parent records in place before importing child records.

## Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- **Public unique identifiers:** If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- **Source system and source system reference:** Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new sales lead contacts or are updating sales lead contacts that have source system reference data, then provide the source system and source system reference values.

## Required Attributes and Validations for Sales Lead Contact Object

To import data successfully into Oracle Applications Cloud, your .csv file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for sales lead contact records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Contact record	Updating an Existing Sales Lead Contact record
LeadOrigSystem	The code that identifies the original source system for the sales lead	If providing a value and importing a new sales lead in the same import as this lead contact association, the value must be part of a unique combination of the source system reference (LeadOrigSystemReference) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_T table.	Conditionally required, when the lead is created in the same batch as adding a new lead contact	Not required
LeadOrigSystemReference	The ID that identifies the original source system reference for the sales lead	If providing a value and importing a new sales lead in the same import as this lead contact association, the value must be part of a unique combination of the source system reference (LeadOrigSystemReference) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_t table.	Conditionally required, when the lead is created in the same batch as adding a new lead contact	Not required
LeadId	The unique ID for the existing lead record in the destination table	The value provided must match the value in the LEAD_ID column of the MKL_LM_LEADS table.	Conditionally required, when the lead is created in a different batch as adding a new lead contact.	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Contact record	Updating an Existing Sales Lead Contact record
PartyOrigSystem	The code that identifies the original source system for the contact	If providing a value, the combination of source system reference (PartyOrigSystemReference) and source system code (PartyOrigSystem) must exist in the columns ORIG_SYSTEM_REFERENCE and ORIG_SYSTEM of the HZ_ORIG_SYS_REFERENCES table.	Conditionally required, when you don't provide the contact's party ID (PartyId)	Conditionally required, when you don't provide the unique ID for the record (LeadTcMembersId) or the contact's party ID (PartyId)
PartyOrigSystemReference	The ID that identifies the original source system reference for the contact	If providing a value, the combination of source system reference (PartyOrigSystemReference) and source system code (PartyOrigSystem) must exist in the columns ORIG_SYSTEM_REFERENCE and ORIG_SYSTEM of the HZ_ORIG_SYS_REFERENCES table.	Conditionally required when you don't provide the contact's party ID	Conditionally required when you don't provide the unique ID for the record (LeadTcMembersId) or the contact's party ID (PartyId)
PartyId	The unique ID for the existing contact's party record in the destination table	The value provided must match the value in the PARTY_ID column of the HZ_PARTIES table.	Conditionally required when you don't provide the contact's source system and source system reference	Conditionally required when you don't provide the contact's source system and source system reference
PrimaryFlag	Specifies whether the provided contact is a primary contact on the sales lead	The value must be either Y or N.	Conditionally required, as at least one contact for a lead has this value set to Y.	Conditionally required, as at least one contact for a lead has this value set to Y.

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the sales lead contact object. The page also lists attribute information like type, length, description, and so on.

## Create the Source CSV File

You include the data that you want to import into 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 **Sales Lead Contact** 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 sales lead contact 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 Sales Lead Contact 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. 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.

### Related Topics

- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)
- [How do I import data?](#)

## Import Your Sales Lead Product Data

You can use the Import Management to create, update, or delete sales lead product records.

You can import sales lead product records using these steps:

1. Map your source sales lead product data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the sales lead product data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

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

To import your sales lead product 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 must 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.

- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

## 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.
- You have all parent records in place before importing child records.

## Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- **Public unique identifiers:** If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- **Source system and source system reference:** Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new sales lead products or are updating sales lead products that have source system reference data, then provide the source system and source system reference values.

## Required Attributes and Validations for Sales Lead Product Object

To import data successfully into Oracle Applications Cloud, your .csv file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for sales lead product records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Product record	Updating an Existing Sales Lead Product record
ItemId	The unique ID for the existing sales catalog product (item) record in the destination table	The value provided must match the value in the INVENTORY_ITEM_ID column of the EGP_SYSTEM_ITEMS_B table.	Conditionally required, when you don't provide the ProductName and ProductGroupId/ProductGroupName	Conditionally required, when you don't provide the ProductName and ProductGroupId/ProductGroupName
ItemNumber	The unique ID for the existing sales catalog product (item number) record in the destination table	The value provided must match the value in the ITEM_NUMBER column of the EGP_SYSTEM_ITEMS_B table.	Conditionally required, when you don't provide the ProductName and ProductGroupId/ProductGroupName	Conditionally required, when you don't provide the ProductName and ProductGroupId/ProductGroupName

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Product record	Updating an Existing Sales Lead Product record
LeadNumber	Leads Public Unique Identifier value	The value provided must match the value in the LEAD_NUMBER column of the MKL_LM_LEADS table.	Conditionally required, when you don't provide the LeadId	Conditionally required, when you don't provide the LeadId
PrimaryFlag	Indicates whether the product or product group is the primary product of interest for the lead	The value must be either Y or N.	Conditionally required, as at least one product or product group for a lead has this value set to Y	Conditionally required, as at least one product or product group for a lead has this value set to Y
ProductGroupInternalName	Internal name for the sales catalog product group	The value provided must match the value in the INTERNAL_NAME column of the QSC_PROD_GROUPS_B table.	Conditionally required, when you don't provide the ProductGroupId and ItemId/ProductName	Conditionally required, when you don't provide the ProductGroupId and ItemId/ProductName
ProductGroupId	The unique ID for the existing product group record in the destination table	The value provided must match the value in the PROD_GROUP_ID column of the QSC_PROD_GROUPS_B table.	Conditionally required, when you don't provide the ProductGroupName and ItemId/ProductName	Conditionally required, when you don't provide the ProductGroupName and ItemId/ProductName
ProductGroupName	The internal name for the sales catalog product group	The value provided must match the value in the INTERNAL_NAME column of the QSC_PROD_GROUPS_B table.	Conditionally required, when you don't provide ProductGroupId and ItemId/ProductName	Conditionally required, when you don't provide ProductGroupId and ItemId/ProductName
ProductName	The internal name for the sales catalog product	The value provided must be defined for the sales catalog specified for the QSC_SALES_PRODUCTS_INVENTORY_ORG_ID profile.	Conditionally required, when you don't provide the ItemId and ProductGroupId/ProductGroupName	Conditionally required, when you don't provide the ItemId and ProductGroupId/ProductGroupName

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the sales lead product object. The page also lists attribute information like type, length, description, and so on.

## Create the Source CSV File

You include the data that you want to import into 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 **Sales Lead Product** 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 sales lead product 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 Sales Lead Product 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. 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.

### Related Topics

- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)
- [How do I import data?](#)

## Import Your Sales Lead Resource Data

You can use the Import Management to create, update, or delete sales lead resource records.

You can import sales lead resource records using these steps:

1. Map your source sales lead resource data to Oracle Applications Cloud object attributes. This way the import process would know where to insert each of the information bits.
2. Create the source CSV file with the sales lead resource data you want to import.
3. Kick off an import activity.
4. Check the import results to know if the import went well.

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

To import your sales lead resource 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 must 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.

- Ensure prerequisite steps are complete, such as understanding what attributes are required for importing your objects.
- Understand your options for uniquely identifying the records.
- Ensure parent records exist before importing child records.
- Identify the target object attributes that are required in the .csv file for a successful import

## 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.
- You have all parent records in place before importing child records.

## Select a Unique Identifier for Your Records

All records must be unique in the application. You can use one of these to identify records:

- **Public unique identifiers:** If you're creating records, then you can provide an easily understandable public unique identifier. These are, usually, denoted with 'Number' and visible in the business object's UI. PUID attributes are usually named <object> Number. If you're updating a record with a Number attribute, then use the Number attribute to identify the record. For more information about public unique identifiers, see the topic "How You Use Alternate Keys to Import Records" in Related Topics section.
- **Source system and source system reference:** Source system is an identifier for the external system, and source system reference is a unique identifier within the external system. If you're importing new sales lead resources or are updating sales lead resources that have source system reference data, then provide the source system and source system reference values.

## Required Attributes and Validations for Sales Lead Resource Object

To import data successfully into Oracle Applications Cloud, your .csv file must include the required attributes. Ensure that you provide valid values for the attributes.

This table lists the required attributes for sales lead resource records, prerequisite setup tasks and specific validations, if any:

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Resource record	Updating an Existing Sales Lead Resource record
LeadId	The unique ID for the existing lead record in the destination table	The value provided must match the value in the LEAD_ID column of the MKL_LM_LEADS table.	Conditionally required, when you don't provide the LeadNumber	Conditionally required, when you don't provide the LeadNumber
LeadNumber	The Lead's Public Unique Identifier value	The value provided must match the value in the LEAD_NUMBER column of the MKL_LM_LEADS table.	Conditionally required, when you don't provide the LeadId	Conditionally required, when you don't provide the LeadId
LeadOrigSystem	The code that identifies the original source system for the sales lead	If providing a value and importing a new sales lead in the same import as this	Conditionally required, when the lead is created in	Not required

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Resource record	Updating an Existing Sales Lead Resource record
		lead resource association, the value must be part of a unique combination of the source system reference (LeadOrigSystemReference) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_T table.	the same batch as adding a new team member	
LeadOrigSystemReference	The ID that identifies the original source system reference for the sales lead	If providing a value and importing a new sales lead in the same import as this lead resource association, the value must be part of a unique combination of the source system reference (LeadOrigSystemReference) and the source system code (LeadOrigSystem) in the MKT_IMP_LEADS_T table.	Conditionally required, when the lead is created in the same batch as adding a new team member	Not required
LeadResourceId	The unique ID for the existing sales team member (resource) association record in the destination table	Automatically generated by the import process	Automatically generated by the import process if creating a new record	Required
ResourceId	The unique ID for the existing resource's party record in the destination table	Provided value must match with PARTY_ID column of HZ_PARTIES table.	Conditionally required, when you don't provide the resource's source system and source system reference or the resource's user name.	Conditionally required, when you don't provide the unique ID for the record or the resource's source system and source system reference.
ResourceOrigSys	The source system code that identifies the original source system of the lead sales team members party	If providing a value, the combination of source system reference (ResourceOrigSysRef) and source system code (ResourceOrigSys) must exist in the columns ORIG_SYSTEM_REFERENCE and ORIG_SYSTEM of the HZ_ORIG_SYS_REFERENCES table.	Conditionally required, when you don't provide the resource's party ID (ResourceId)	Conditionally required, when you don't provide the unique ID for the record (LeadResourceId) or the resource's party ID (ResourceId)
ResourceOrigSysRef	The ID that identifies the lead sales team member's party in your legacy or external system	If providing a value, the combination of source system reference (ResourceOrigSysRef) and source system code (ResourceOrigSys) must exist in the columns ORIG_SYSTEM_REFERENCE and ORIG_SYSTEM of the HZ_	Conditionally required, when you don't provide the resource's party ID (ResourceId)	Conditionally required, when you don't provide the unique ID for the record (LeadResourceId) or the resource's party ID (ResourceId)

Attribute	Description	Prerequisite Setup Task/ Import Validations	Creating a Sales Lead Resource record	Updating an Existing Sales Lead Resource record
		ORIG_SYS_REFERENCES table.		
UserName	The resources application user name.	No validation	Conditionally required, when you don't provide the resource's source system and source system reference or the resource's unique ID	Not required
PrimaryFlag	Indicates whether the resource is the Owner of the lead	The value must be either Y or N.	Conditionally required, as at least one contact for a lead has this value set to Y	Conditionally required, as at least one contact for a lead has this value set to Y

Go to **Navigator > Tools > Import Management > Import Objects**, to see all the attributes of the sales lead resource object. The page also lists attribute information like type, length, description, and so on.

## Create the Source CSV File

You include the data that you want to import into 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 **Sales Lead Resource** 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 sales lead resource 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 Sales Lead Resource 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. 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.

### Related Topics

- [Potential Issues When Opening CSV Files in Excel](#)
- [How You Use Alternate Keys to Import Records](#)
- [How do I import data?](#)

## Lead Follow Up

### 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.

## Differences Between Response, Lead, and Opportunity

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

Response	Lead	Opportunity
<p>A response is an interaction initiated by the customer in response to a marketing stimulus. Every outbound sales activity is a sales stimulus.</p>	<p>A lead is an inquiry, referral, or other information, obtained through marketing campaigns, or other means that identifies:</p> <ul style="list-style-type: none"> <li>• Potential contact or prospect</li> <li>• Specific purchase interest</li> </ul> <p>You can create a lead if the specific purchase interest isn't known at the time. However, to qualify a lead you must record a primary purchase interest.</p>	<p>An opportunity is a pending sale of a product or service that can be forecasted and tracked using summary data such as:</p> <ul style="list-style-type: none"> <li>• Potential revenue</li> <li>• Sales stage</li> <li>• Win probability</li> <li>• Expected close date</li> </ul>
<p>Responses are created from interest recorded in response to sales activities. Responses include:</p> <ul style="list-style-type: none"> <li>• Providing answers to phone survey questions</li> <li>• Subscribing to a list</li> <li>• Replying to an email response form request</li> </ul> <p>As interest for the product or service matures, responses are elevated as leads.</p>	<p>Leads are mostly created by automated lead capture or lead import processes which periodically create qualified responses as sales leads.</p> <p>Leads are sometimes created from the response data of a contact or prospect who has expressed a need or interest in a product or service offered by the business.</p>	<p>Opportunities are created by sales administrators when they have identified a qualified lead with a potential revenue opportunity. Leads are converted to opportunities when significant sales investment is foreseen to close the deal.</p> <p>A salesperson can create opportunities from scratch, without previously having a response or lead created.</p>
<p>Responses aren't included as part of the sales forecast.</p>	<p>Leads aren't included as part of the sales forecast.</p>	<p>Inclusion of opportunities in the sales forecast is at the discretion of the sales administrator. However, not all opportunities are included and the decision to include them may depend on your company's requirements.</p>

Response	Lead	Opportunity

## Lead Actions

Use lead actions to manage leads. This topic provides a brief description of the actions that you perform on a lead. Lead actions are generally grouped into these categories:

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

The ability to perform each action depends on:

- Privileges assigned to your role
- Access level as a lead sales team member
- Current status of the lead

## Perform Lead Actions

Here are some of the actions you can perform to manage single and multiple lead records.

Action	Description
Accept	Updates the lead with you as the owner. The Request Sales Lead Assignments process assigns sales team territories and resources based on predefined rules. The rules are specified in the Assignment Rule for Ranking Leads profile option.
Add to Campaign	You can add leads as campaign members to your marketing campaigns created and updated in Oracle Eloqua. After the added campaign members are synchronized to Oracle Eloqua, they get added to the specified marketing campaigns.
Assign Partner	Use to assign a single lead to a partner. The sales channel of a lead indicates whether the lead is being handled directly by an internal salesperson (Direct), or indirectly (Partner) by an outside partner, such as a distributor or a reseller.
Convert to Opportunity	Creates an opportunity based on lead information. The lead status is updated to converted.
Create Appointment	Use to create an appointment when working on your lead.
Create Call Report	Use to create a call report when working on your lead. A call report is a central place for salespeople to capture what happened in a sales activity, make related changes, and track key updates.
Create Note	Use to create a note when working on your lead.



Action	Description
Create Task	Use to create a task when working on your lead.
Delete	Use the Delete action to remove a lead from your list of leads you own.
Log a Call	After you complete a call with your lead, you can log the call details.
Qualify	Updates the lead status to Qualified, bypassing the automated sales lead classification process.
Mass Update	Performs a mass update of specific attributes and user-defined attributes from the Leads Overview work area when selecting multiple records.
Rank	Submits the Request Sales Lead Assignments process to automatically assign a lead rank based on predefined rules specified in the Assignment Rule for Ranking Leads profile option. A rank represents the priority of the lead, such as Hot, Medium, and Cool.
Reassign	<p>Provides choices for when the sales lead assignment process evaluates the lead to reassign sales team members and territories to the lead:</p> <ul style="list-style-type: none"> <li> <b>Automatic assignment</b>                      Lead is selected for reassignment and is reassigned when the Request Sales Lead Assignments process next runs using the Reassign process selection criteria.                 </li> <li> <b>Immediate automatic assignment</b>                      Immediately runs the Request Sales Lead Assignments process, reevaluating, and reassigning per the process.                 </li> <li> <b>Manual assignment</b>                      You can select an owner to assign to the lead from a list of eligible resources.                      A lead must have a Qualified or Unqualified status to be reassigned.                 </li> </ul> <p><b>Note:</b>                      You can send a notification when a Lead is assigned to a new owner. See the section Sample Groovy Scripts for Notifications in the Notifications chapter of the Implementation Reference guide for more information.</p>
Retire	Updates the lead status to a retired lead indicating the lead is no longer one that needs pursuing.
Reject	<p>Removes you as the lead owner. The accepted indicator and assignment status are also updated to reflect that the lead is no longer accepted. The lead is eligible for reassignment when:</p> <ul style="list-style-type: none"> <li>The next scheduled Sales Lead Processing Activity submits the Request Sales Lead Assignments process</li> <li>The lead meets the processing activity's selection criteria</li> <li>The previous lead owner is excluded when assigning team resources</li> </ul> <p>The reject reason, and the number of times the lead is rejected, is available when searching leads. This information is displayed in the Overview page for analysis and to provide possible indicators that the lead should be retired.</p>

Action	Description
Score	<p>Submits the Request Sales Lead Assignments process to automatically assign a lead score based on predefined rules specified in the Assignment Rule for Scoring Leads profile option.</p> <p>Lead assignment score is different from qualification and assessment scores. A lead score can be used as a source for predefined rules that automatically assign lead rank, qualification status, territories, and resources.</p>

*Related Topics*

- [Lead Statuses](#)
- [Add Leads and Contacts to Marketing Campaigns](#)

## Lead Statuses

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

As specific actions are performed on a lead, the status of the lead changes accordingly.

### Lead Status

This table describes the statuses of leads.

Status	Description
Unqualified	A lead with a status of unqualified signifies that the lead requires additional information and qualification activities by the lead team. Unqualified is the default status assigned to all newly created leads.
Qualified	A qualified lead signifies that the lead is ready for sales attention. The status can be updated to qualified by either the user selecting the Qualify action or upon successful completion of the qualification processing activity. Leads can have a status of qualified based on many factors including the status of the budget and the time frame of the project.
Converted	When a lead is converted to an opportunity, then the status is set to Converted.
Retired	<p>The status of a lead is updated to Retired when a user selects the Retire action. A lead is retired when:</p> <ul style="list-style-type: none"> <li>• There's no likelihood of the lead being converted to an opportunity</li> <li>• A lead is no longer followed up by Sales</li> <li>• A lead isn't evaluated by Marketing over a certain period of time</li> </ul> <p>A retired lead can't be converted to an opportunity. Marketing users can review retired leads and then delete them as required.</p>

### Related Topics

- [Lead Actions](#)

## Lead Conversion

A lead's life cycle ends either when a lead is converted to a sales opportunity, or when the lead is retired. Conversion to an opportunity stage allows the sales representative to pursue the account in the sales cycle.

After establishing that the lead has potential, the sales representative converts the lead to an opportunity. Contact is established and meetings and presentations are scheduled to move the opportunity along the sales pipeline.

To convert a lead to an opportunity depends on the privileges assigned to your role, your access level as a lead sales team member, and the current status of the lead. You can convert a lead to an opportunity from the Actions menu by selecting **Convert**. This action creates an opportunity based on lead information. When a lead is converted to an opportunity, the lead status is set to Converted.

### Leads to Opportunities Conversion

You convert a lead to an opportunity when the lead is ready for further processing along the sales cycle. Once the conversion is successfully completed, you can review the newly created opportunity using the opportunities UI. During your review, you might want to retain only a select few lead product lines to pursue as opportunity revenue line items. Since the conversion process automatically creates revenue lines from all lead lines, you can remove unwanted revenue lines from the opportunities UI. You can, at a later stage, create another opportunity from the removed lead revenue lines by converting the lead to an opportunity again. You can then decide to keep only those revenue lines that you want on the newly created opportunity.

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

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

**Note:** If a lead is converted to an opportunity by a user who isn't the owner of the lead, then that user becomes the owner of both the converted lead and opportunity.

You can view opportunities associated with leads in the leads UI. If you don't see the converted lead in your list of opportunities, this means that the opportunity is assigned to a different territory.

### Convert Leads Using a Smart Action

You can take actions on lead items from your list of lead records by using the Actions menu (three dots on the right of the item) on the My List for Leads page. For example, you can use the **Convert** quick action to convert a lead to an opportunity. From the Convert Lead window, you can change the opportunity name, enter an account and contact, and reassign opportunity ownership. When you click **Submit**, the application creates the new opportunity and you can view it from the Opportunities UI.

## Redirect to Opportunity After Lead Conversion

Converting a lead to an opportunity lets you pursue the account in the sales cycle. You can choose whether you want to be redirected immediately to the opportunity page after the successful conversion.

This reduces the time spent going to the Opportunities subtab on the Lead and finding the right opportunity to open. To get redirected to the edit opportunity page depends on the privileges assigned to your role, your access level as a lead sales team member, and whether your sales administrator has configured the **Redirect to Opportunity After Conversion** check box on the Convert Lead page in Application Composer.

**Note:** This feature is available only for converting leads using the simplified UI. Workspace smart actions doesn't support being directed to an opportunity after performing a lead conversion so if you want to convert leads in Workspace, then don't enable this feature.

You can convert a lead to an opportunity from the Actions menu by selecting **Convert**. An error message displays if you don't have the required privilege to convert the lead. You will be returned to the lead details page or the lead list page from where you started the lead conversion action.

**Note:** The Redirect to Opportunity After Conversion check box is deselected by default and is available only for single lead conversions. It isn't available on the Mass Convert Layout Pages for Leads.

### How to Redirect to Opportunities Page After Conversion

You convert a lead to an opportunity when the lead is ready for further processing along the sales cycle. Here's how to select whether you want to be redirected immediately to the opportunity page after a successful lead to opportunity conversion.

1. Navigate to the Leads UI and select the lead you want to convert to an opportunity.
2. From the **Actions** drop-down list, select **Convert**.
3. From the Convert Leads dialog, select the **Redirect to Opportunity After Conversion** check box.
4. Click **Submit**.

Once the conversion is successfully completed, you're brought immediately to the opportunities UI where you can review and edit the newly created opportunity.

## Verify Email Addresses and Phone Numbers for Leads

When your sales organization subscribes to the Oracle Address, Email, and Phone Verification service, you know right away if you entered an invalid phone number or email address for your leads.

The application can't check if the phone numbers and emails you enter are valid for the specific person or account, of course, but it can make sure that a phone number will actually dial and that an email won't bounce.

When a phone number or an email address is invalid for some reason, you get notified right under your entry. If nothing appears, your entry is valid. Here's a screenshot of an invalid phone number for a lead to give you an idea of what you see under invalid information:

Callout Number	What You See
1	Status. For phone numbers, this can be only <b>Invalid</b> . Email addresses can also display the status of <b>Partially-Valid</b> : the domain is valid but the name isn't. For example, if the contact left the company, or changed their name, you'll see the <b>Partially-Valid</b> status for the email.
2	Date the email address or phone number was verified by the application.
3	Re-verify button that you can use to verify again. You never know when area codes or email addresses may change. Contact details that are valid today mightn't be valid in six months.
4	Override button to manually set the status. If you know the phone number or email is correct, you can set the status to <b>Verified</b> . When you do, you see <b>Overwritten on</b> instead of <b>Verified on</b> .

The application does display a **Valid** status, but only much later. By default, the status appears 180 days later. If the contact information is old, you may want to verify it again by clicking the Re-verify button. You can specify the number of days before the Valid status appears or even turn this option off during setup. For details, see the related topic: [Enable the Verification of Addresses, Emails, and Phone Numbers for Leads](#).

## Manually Override Your Lead Email and Phone Verification Status

If you don't agree with the verification status for the email address or phone number for your lead, you can override it by clicking **Override** (the double arrow icon highlighted below).

## Re-verify Email Addresses and Phone Numbers for Leads

You can verify if a lead phone number or an email address is still valid by clicking Re-verify (the curved arrow highlighted in the screenshot).

## Apply Mass Update of Fields to Leads

You can apply changes to several fields on multiple leads at once using the mass update feature. For example, you can update the rank of multiple leads at the same time without having to go into each individual record.

Among the fields that you can update are:

- Account
- Budget Amount
- Budget Status
- Campaign
- Currency
- Customer Need
- Deal Size
- Decision Maker Identified
- Description
- Primary Contact
- Primary Product
- Rank
- Sales Channel
- Source
- Time Frame

**Note:** Your administrator must enable this feature before it's available in the application.

### Steps to Apply Mass Update

Here's how to update several fields on multiple leads at once:

1. Navigate to the **Leads** landing page.
2. Search for the records you want to update.
3. Click **Update** from the **Actions** menu.
4. Select the records that you want to update and click the **Update** button.
5. Select the fields and assign or enter values for them. Keep in mind:
  - If you want to update a field that has a parent field, then the value of the parent field must be the same across all child records selected for mass update.
  - You can't apply mass update to conditionally updatable fields.
6. When you're done making updates click **Submit**.

#### Related Topics

- [How do I enable mass update of records?](#)

## How Users Gain Access to Leads

This topic explains how the security reference implementation provided by Oracle determines who can access what lead information in your sales organization.

Qualified leads are assigned to a sales team based on sales territories. Unqualified leads are assigned to individual lead qualifiers either manually or based on rules defined in the assignment manager application. Whether or not you can access a particular lead depends on your membership in the resource and territory hierarchies.

You can access a lead if the following conditions apply:

- You're the lead owner.
- The lead owner or sales team member is your direct or indirect report in the resource hierarchy.
- You're a member of the lead sales team.

Resources in the management hierarchy of a newly added lead sales team member have the same level of access to the sales leads as the team member.

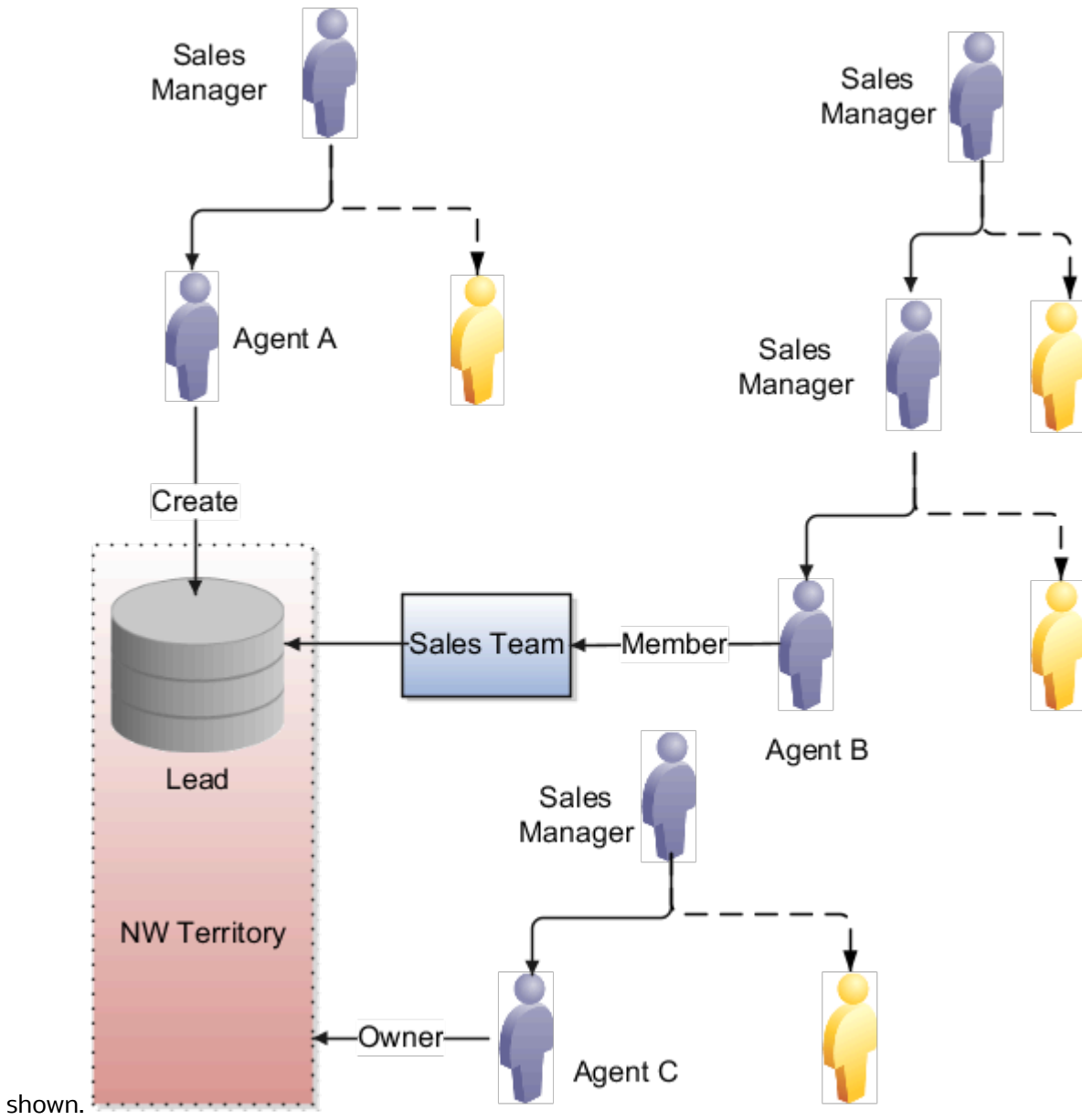
- You're the owner or you're a member of the territory assigned to the lead.
- You're the owner or member of an ancestor territory of the territory assigned to the lead.

**Note:** Your administrator can provide view only access to users by creating a custom role and adding new data security for the sales lead with all values set to view only privileges. See the Data Sharing Mechanisms and Object Visibility chapter of the Securing Sales and Fusion Service guide on Oracle Help Center (<https://docs.oracle.com>).

The flowchart illustrates some of the different ways you can gain access to a lead:

- Named agents in the diagram (A, B, and C) can access the lead.
- Unnamed agents (highlighted in yellow) can't access the lead.
- Sales managers can access the lead because a salesperson in their management chain has access.

Here's an example flowchart that shows who in a sales hierarchy can access a sales lead. Access using accounts isn't



shown.

- Agent A can access the lead because agent A created it. When you create a lead, you're the initial owner.
- Agent B can access the lead because agent B is on the sales team.
- Agent C can access the lead because agent C is the owner of the NW territory.
- Sales managers who are higher up in the management chain can also see the lead because access is provided through the resource hierarchy. The manager of agent C can access the lead information, but colleagues of agent C don't have access to the lead.



## Special Access

Not all access is affected by the management hierarchy and membership in sales teams or territories. For example, special access includes:

- *Administrators:* Administrators get access to leads 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 Registration:* Salespeople assigned to a deal registration retain access even if they're moved to another deal registration.

## Lead Ownership and Sales Team Resources

A market is typically organized into territories that include customers and prospects. Marketing is closely aligned with sales, and marketing activities are launched to generate leads and maintain the strength of the sales pipeline. This topic explains lead ownership and sales team resources.

When the lead doesn't have any owner, the sales representative can accept the lead which makes him or her the lead owner. All resources who are given access to leads get full access. Full access level allows the user to update the sales lead team by adding or removing individual resources. Hence, territory resources, sales team members and lead owner and resources in their hierarchy, all get full access. Territory team members inherit the access level of the territory. All members of sales territories assigned to the lead have full access to the lead. Ancestor territory owners of all sales territories assigned to the lead also have full access to the lead. Resources who access leads have different roles such as:

- Operations  
Support an automated process to capture leads, prioritize leads for sales engagement, and distribute the leads to appropriate sales or territory team resources.
- Marketing and lead qualifiers  
Monitor leads, reassign leads, and continually review and adjust the lead quality.
- Sales and territory teams  
Enable lead qualification, perform follow-up lead activities, and convert leads to opportunities.

This topic includes these sections:

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

## Lead, Sales, and Territory Resources

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

## Assignment of Leads to Marketing and Sales Resources

Qualified leads are assigned to a sales team based on sales territories. Unqualified leads are assigned to individual lead qualifiers either manually or based on rules defined in the assignment manager engine. Users can be assigned to a lead in one of several ways:

- Ownership through lead creation
- Territory-based lead assignment
- Rule-based sales team member assignment
- Manual selection of resources

## Sales Resource Role

Here are some of the activities performed by sales resources.

- Review quality leads that are augmented with sales collateral, marketing content, customer contact interactions, and references.
- Qualify and assess the lead quality further with the help of user-defined or company-defined assessment templates.
- Use the resource drop-down list to manually select a resource to add to the team.

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

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

### *Related Topics*

- [Examples of Sales Lead Team](#)

## 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](#)

# Qualification

## Lead Qualification

The lead qualification process can either be performed by internal marketing or internal sales groups. This topic provides a brief overview of what constitutes a qualified lead.

Qualifying leads is an important first step in bringing the sales lead to a conclusion. At the end of the lead qualification process, you can classify the lead as a qualified lead that's ready for conversion to an opportunity. Or you can retire the lead if the purchase interest for the lead can't be validated. What constitutes a qualified lead varies from company to company.

## Basic Lead Qualification

In some companies, basic lead qualification data is gathered by lead qualifiers and contains data such as:

- Customer need
- Urgency or time frame for the project
- Budget considerations such as available amount and status

The scheduled process that determines lead qualification status also takes into consideration basic lead data.

## Additional Lead Qualification

In other companies, the lead qualifier or salesperson uses a lead qualification questionnaire as part of the qualification process. Based on the answers received, he or she can decide to manually set the lead to a Qualified status using the lead actions menu. Your application administrator assigns the questionnaire to your Lead Qualification Template profile. The answers entered are assessed using a weighted scoring model with instant feedback available as a scoring status bar in the UI.

### *Related Topics*

- [Example of Defining a Sales Lead Qualification Template](#)

## Perform a Lead Qualification

Lead qualification helps you in the lead follow-up process. Assess the lead quality and lead conversion potential by using the preconfigured qualification templates.

Lead qualification is part of the lead follow-up activity where you further nurture the lead in order to qualify it. Your administrator must set the Advanced Lead Qualification Enabled profile option after the qualification templates are created. This action specifies the qualification template to display in the Edit Lead UI to assist with evaluating the lead.

You can conduct a lead qualification, view completed lead qualifications, and view the responses to the questions posed in the qualification template. Qualification templates enable you to analyze the lead and suggest the appropriate next steps based on the overall assessment score and feedback for the lead.

## Edit a New Lead Qualification

1. From the Navigator, click **Leads**.
2. In the list of leads, click on a lead to edit it. The Edit Lead page appears.
3. Click the **Qualification** tab to open the default qualification template.
4. Fill out and complete the lead qualification template.

If there are multiple qualification templates associated with the lead, then you can choose to select a different qualification by clicking **Replace Qualification**.

### *Related Topics*

- [How to Create Assessment Templates](#)
- [How Assessment Template Score Range is Calculated](#)
- [Assessment Template Components](#)

## Overview of Lead Qualification Templates

When you create a lead, you can qualify the lead by leveraging the many templates provided by your sales organization. Evaluate various aspects of the lead which can subsequently help you sell more by converting the leads in less time.

### Qualification Templates

After you create the lead, go to the **Qualifications** tab to view and complete the recommended qualification template created for you by your organization. If there are multiple templates associated with the lead, select one by clicking **Replace Qualification**. Any responses for the current qualification will be reset and can't be restored. You can choose to cancel the operation and use the current qualification template, or you can choose to continue.

If you continue, the qualification UI is refreshed to display the questions from the template you selected. Start entering responses to the questions and track the updates from the Qualification status fields on the page. Statuses toggle between: Not Started, In Progress, and Completed. You can also include other status values such as the number of questions answered, last updated date, and name of the template. Track the total score by summing up the weighted answers and display a graphical circular format of the score.

#### Related Topics

- [Perform a Lead Qualification](#)

## Perform Multiple Lead Qualifications Using the Same Template

You can requalify your sales lead information and perform multiple qualifications for leads using the same qualification template. To do this, your administrator must set the profile option Enable Multiple Assessments Per Qualification Template to Yes at the site level.

From the Edit Qualification page click **Add Qualification** and then select the template you want from the available templates for your sales lead. If you add an additional qualification using the same qualification template, the application automatically generates a qualification name using the qualification template name plus a counter suffix. For example, if you have an existing qualification for a lead named Lead Qualification V1, then if you add another qualification using the same template, the new qualification name is displayed as Lead Qualification V2. You can edit this name to suit your own requirements.

When all questions are answered, the qualification is set to Complete status and continues to be available for edit. You can view all ongoing or historical qualifications, scores, statuses, and qualification template names. Use the Delete and Submit features only if the buttons are enabled by your administrator using Page Composer. You can delete a qualification that's no longer required or if it was created by mistake as long as it hasn't been submitted. The Submit button, if enabled, becomes available only when you have entered responses for all questions. Submit isn't available on the single lead qualification page. You can't edit the lead qualification once the status is set to Submitted but you can continue to view it.

### Perform Multiple Lead Qualification

Before you begin, ensure that your administrator has set the Enable Multiple Assessments Per Qualification Template (MOW\_MULTIPLE\_QUALIFICATIONS\_ENABLED) profile option to Yes. You must also have Full or Edit access on a lead to

perform multiple qualifications and update existing qualifications for leads using the same qualification template. With View Only access, you can view qualifications but not update them.

Here's how to perform multiple lead qualifications using the same qualification template:

1. From the Navigator, click **Leads**.
2. In the list of leads, select a lead to edit it. The Edit Lead page appears.
3. Click the **Qualification** tab to open the Edit Qualification page.  
If existing qualifications are available for the selected lead, they're listed here.
4. Click **Add Qualification**. The **Add Qualification** dialog appears.
5. From the **Template** drop-down list, select the qualification template previously chosen for the selected lead qualification.
6. Click **Save and Continue**.
7. Select the appropriate responses to all the questions.
8. Click **Submit** and then click **Yes** from the confirmation dialog box.  
Once the qualification has a status of Submitted, it can't be revised.

## Examples of Lead Qualification

This topic explains the lead qualification process and provides examples of the different methods used for qualifying leads.

### Lead Qualification Process

Lead quality is assessed as soon as a lead is generated and is mainly based on:

- The characteristics of the customer contact on the lead
- The type of response which caused the lead to be generated
- The type of campaign that the lead may be associated with

Leads are enriched further, typically by means of prequalification telemarketing activities performed by internal marketing, internal sales groups, or external third-parties. Qualification data is added to the lead such as:

- Customer need
- Urgency or time frame for the project
- Budget considerations such as available amount and status

At the end of this process, the lead is either:

- Classified as a qualified lead which is ready for conversion to a sale
- Retired if purchase interest for the lead can't be validated

The following scenarios illustrate some of the lead qualification processes.

### Rule-Based Lead Qualification

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

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

If this rule evaluates to TRUE, the value of **Lead Status** is set to Qualified.

## Internal Marketing Qualification

Internal lead qualifiers or inside salespeople conduct phone conversations to gather qualification data about leads. They can use qualification templates to define consistent and specific qualification criteria for similar leads. The qualification questions are tailored to a specific product, industry, and source of the lead.

Before updating the lead status to qualified, the lead must have a valid primary product associated with it. Users can select multiple leads and select **Qualify** from the **Actions** list. Leads meeting the requirements for lead qualification are processed.

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

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

- Contact attended a product event
- Budget is approved
- Purchase time frame is less than a year

The **Additional Qualification** tab displays the qualification template with questions where you can enter the answers on the same page. Most of the data required to qualify the lead is available from the Basic Qualification area of the Lead details page. Supporting data is included in the contextual area for easy reference.

## Internal Sales Group Qualification

Leads are generated and captured from many different sources. Leads are created when customers are created. Leads are also generated from leads that already exist. After salespeople accept the generated leads, they can evaluate the quality of the information received for the lead. They determine if the details are sufficient to reach out to the customer and assess whether a lead is worth pursuing with the help of predefined assessment templates. If they can establish that the lead has potential and can be marked as qualified, they can then convert the lead to an opportunity. Contact is established and meetings and presentations are scheduled to move the opportunity along the sales pipeline.

## External Third-Party Qualification

External third-party qualification involves using input from a third-party source to qualify leads. For example, your company has obtained a list of contacts that purchased a car in the last 90 days. You have hired a telemarketing

company to call each contact to determine if there is interest in your company's auto security products. The third-party telemarketer provides weekly files of potential contacts who are interested in your products. Using the Import Management framework and qualification rules configured using the assignment manager engine, the interactions resulting from the telemarketer's activities are imported as leads. The marketing operations manager schedules the rule-based qualification process to occur as soon as the enriched lead data is imported to the lead management application. If the rules evaluation is successful, the result sets the lead status as Qualified.

#### *Related Topics*

- [Lead Assessments](#)
- [Lead Ranking](#)

## Lead Artificial Intelligent (AI) Score

### About Artificial Intelligent (AI) Lead Score

You can use the AI Lead Score field to indicate the lead conversion probability of a sales lead being converted to an opportunity.

Lead scores are numeric values typically ranging from 1 to 100 and where the higher value represents a high conversion probability. At a glance, the AI Leads Score helps you to prioritize and focus on those leads that are more likely to get converted to opportunities.

### What happens when the AI lead score changes ?

The AI Lead Score is associated with the AI Update Who Columns Threshold (ORA\_ZCA\_AI\_UPDATE\_WHO\_THRESHOLD) profile option value.

The profile option is set to a predefined value of 5 which represents the percentage threshold value of a potential change in the Artificial Intelligence (AI) lead score based on data from Oracle AI Apps for Sales. When the AI Lead Score changes, and if your administrator has exposed the AI Lead Score field, then the latest score value is displayed on the Lead details page. In the Workspace UI, the latest value of the AI lead score is available only if the recent change exceeds or equals the percentage threshold value specified in the AI Update Who Columns Threshold profile option.

When a change to the AI Lead Score exceeds or equals the percentage threshold value, the Last Updated Date field gets updated for the lead. This ensures that the updated records are included in the next run of the Adaptive Search indexing process.



# Use Slack for Leads

## View Your Leads in Slack

Slack is a team communication tool that facilitates synchronous communication across different devices. Regardless of whether your team is co-located or distributed, Slack provides an effective communication channel that's easy to use.

Let's say you're traveling and you would like to quickly view a list of the current leads owned by you. You can do this on Slack using any device, without signing in to your sales application.

**Note:** The only criterion is that your administrator has set up the integration of Slack with your sales application.

You can view the first five leads owned by you. These first five leads are selected from only the qualified and unqualified leads owned by you in the last three months.

To view your first five leads in the last three months on Slack:

1. Navigate to your workspace in Slack.
2. Select one of the following:
  - o Any public channel in the Slack workspace
  - o Slackbot
  - o Oracle Sales Slack app: This refers to the app that your administrator has created in Slack for integrating with your sales application.

**Note:** Due to security restrictions, you can't view your leads if you select the following:

- o Private channels
- o Any user under direct messages

3. Enter the following command at the command line: `/ec-my-leads`
4. Press Enter.

The first five leads owned by you in the last three months are displayed in Slack. The following fields are displayed for each lead:

- o Lead Name
- o Lead Status
- o Account Name or Customer Party Name
- o Description
- o Campaign Name
- o Rank

**Note:** Every sales representative who executes the `/ec-my-leads` command can see only the leads owned by him or her. You can't view the leads owned by other sales representatives. Moreover, your leads are only visible to you and not to any other user.

## FAQs for Leads

### Frequently Asked Questions (FAQs) for Leads

This section contains some frequently asked questions (FAQs) for Leads. Scroll or search to find answers to common questions.

#### How can I quickly enter and search address details for leads?

Lead address fields such as Country, City, State, and Postal Code have type-ahead and autocomplete features based on the values you start to enter.

For example, when you begin to enter one of these fields, the application either displays the matching filter names and makes it possible for you to select filter values or the associated values are automatically inserted for you in the appropriate fields.

Use letter keys on your keyboard to display values within the Country field. You can also filter by City, State, and Postal Code fields based on the selected country, and you can filter by City and Postal Codes, based on the state selected.

#### What leads are displayed when I select My Open Leads?

My Open Leads displays a list of all qualified and unqualified leads where you're listed as the lead owner and for leads created in the last 90 days, or another number of days as specified in a system profile.

You are automatically the lead owner if you create the lead or you can be designated as the owner by an application administrator.

#### Who can view the record sets for leads for saved searches?

The different record sets provided in the Saved Searches window restrict your saved searches to different sets of leads.

The following table lists and describes the record sets for leads. Not all record sets are available to all users. For example, the record sets involving subordinates are available only to managers.

**Tip:** 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 leads in one state instead of the whole country.

Record Set Name	Description
I own	Leads you own, including those leads you created or where ownership is assigned to you.
I am on the team	Leads where you're on the lead team. You are on the lead team if you're the lead owner or were added as a member by another team member.
My territory	Leads in your sales territories.
My subordinates own	Leads where you or your subordinates are on the lead team.
My territory hierarchy	Leads in your sales territories and all of their subordinate territories in the sales territory hierarchy.
All records I can see	Leads that you can view based on your lead team membership, sales territory assignments, your position in the organization, and security permissions.

## Why do I see two Primary Product options for Advanced Search on Leads?

Two Primary Product search options are available in the Lead Advanced Search dialog. Both options point to the same Primary Product field, but when selected, one option performs a List of Values search and the other option performs a Text search.

The first option is the default List of Values search (as Primary Product is a Dynamic Choice List (DCL) field) and the second Primary Product search option lets you use a text search with improved search results performance.

## How can I create a lead with new contact and new account for a sales prospect?

By default, the leads pages display only names of accounts and contacts that already exist in the application.

If you want to create leads for new accounts or add new contacts, then you must create the appropriate account and contact records before creating the lead.

If your business uses net new leads where contact and account values are entered manually using free form text fields, then your administrator 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, your administrator must manually unhide these fields.

### Related Topics

- [Expose New Account and New Contact Fields for Leads](#)

## What happens when I enter a last name with two parts?

During lead creation, if you enter a value for Last Name with two parts that aren't separated by a hyphen, the application removes the first part of the last name and moves the value to the Middle Name.

## Why was a customer reference displayed for my lead?

A customer reference is based on the customer industry and associated lead product or product group related to the specific lead. For example, a customer reference displays for your lead if a customer has purchased a similar product or service.

You can leverage the reference details for effective lead follow-up. The leads UI is designed to ensure that you're productive and can readily access related lead information with as few clicks as possible. Supporting data related to each lead is included in the contextual area for easy reference. It includes references to all open leads and open opportunities for the lead customer, as well as supporting collateral. This information is useful to the lead sales team to facilitate an effective lead follow-up.

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

Yes, you can convert the same lead into another opportunity and then delete unwanted product lines. For example, during your review of an opportunity, you want to retain only a select few of the lead product lines to pursue as opportunity revenue.

Since the conversion process automatically creates the product lines from all lead lines, you can remove unwanted product lines from the opportunity details page. You can, at a later stage, create another opportunity from the removed lead product lines by converting the lead to an opportunity again. You can then decide to keep only those product lines that you want on the newly created opportunity.

## Can I capture competitor details for my leads?

Yes, you can track competitors for a lead and identify one of them as a primary competitor. When you convert a lead to an opportunity, the mapped competitor information is automatically carried over to the opportunity.

Tracking competitor data provides you with useful insights for your leads and prospects. For example, you can plan appropriate sales strategies to help close deals more effectively. To capture competitor details for your lead, your administrator must expose the **Competitor** subtab in the Leads page, and enable the **Primary Competitor** field.

## How can I check for duplicate leads?

As a sales representative you want to know if your leads for new contacts or accounts have any duplicates in the application. You can manually check for leads duplicates from the edit leads page.

Select the lead that you want to check and from the **Actions** menu, select **Duplicate Check**. Duplicate check can only be run on new (non-existing) contacts and accounts.

A message is displayed if no duplicates are found for new contacts or accounts. If potential duplicates exist, the Resolve Duplicates page is displayed for the contact or account where you can select the appropriate contact or account to resolve any duplicates.

## Why did the deal size change?

The deal size is automatically determined by the products entered for the lead. When you add or remove products for a lead the deal size is recalculated. You can override the calculated amount after all products are entered.

For example, if the lead is eligible for a discount, you can manually change the total of the deal size to apply the discount. However, the application overrides the deal size total if you add or remove a product from the lead after having manually adjusted the deal size. In this case, you have to reapply the manual change.

## Can I perform a mass update for leads of different business units?

You can't perform a mass update of modified values for leads that apply to different business units. A dialog box is displayed if the selected leads belong to different business units which don't share the same reference data sets.

You must remove the set-enabled attribute for the offending leads and perform the mass update only for leads with business units containing the same reference data sets. For more information on reference data sets, see the topic *How Business Units Work with Reference Data Sets*. Also, consult the online help, using keywords "reference data".

## Why can't I see the lead source channel from the lead details page?

The Source field value is removed from the lead details each time the lead business unit (BU) is changed. You enter your source field value based on a BU and set ID lookup types when you create a lead.

Since multiple business units can exist, the set ID lookups are reset each time a BU is changed to reflect the values specific for the changed business unit. For more information about lead business units and set ID lookups, see the *Multiple Business Units in Leads* section of the Implementation Reference guide.

## Where can I find the primary phone number for my lead contact?

The primary phone number for you contact is available from the Contacts overview page. The phone number displayed is the same phone number that's displayed in the Contact Phone field in the Edit Lead summary page.

## Why aren't the modified details of my contact reflected in my lead contact details?

You enter contact details such as phone and email on the lead record when you first associate the contact to your lead. If you later make changes directly to the contact record, those contact updates aren't reflected in your lead contact details.

This is expected functionality because the fields are different and changes made to the contact won't automatically synchronize to the lead contact record. You must manually update the contact details on the lead or get your application administrator to create a groovy script for the `BeforeUpdate` attribute to sync the updated contact data with the associated leads.

## Why did I receive an error when I convert a lead that has more than 255 characters in a custom Description field?

You can't convert a lead if your custom Description field has exceeded the maximum limit of 255 characters.

The long text Description custom field must correspond to the Description field character limit values that are copied from the lead to the account during the conversion process. Reduce the number of characters by less than or equal to 255 characters and try again. Alternatively, request that your administrator increase or remove the character constraint for the custom Description field in Leads.

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

Lead rank suggests a priority to help you select leads for follow up. When the lead is created, a lead rank is first calculated by the assignment manager engine based on ranking rules.

You can select a different lead rank from the list in the UI. When the lead is further processed, a different rank may be assigned based on enriched lead data, or the rules may cause the lead to revert to its original rank.

## How can I select and add products or product groups to my lead?

To browse the sales catalog and select and add products or product groups to your lead, your administrator must have added the Browse Catalog button to the Product region of the Edit Lead page.

Click **Browse Catalog** to open the sales catalog page from where you can search the product or product group that you want. Select the groups or products to include for your selected lead, and when done, click **OK** to return to editing your selected lead.

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

You convert a lead to an opportunity when the lead is qualified and is ready for further processing along the sales cycle. Once the conversion is successfully completed, you can review the newly created opportunity using the opportunities UI.

During your review, you might want to retain only a select few lead product lines to pursue as revenue on the opportunity. Since the conversion process automatically creates product lines (representing revenue) from all lead lines, you can remove unwanted product lines from the opportunities UI.

You can view opportunities associated with leads in the leads UI. When you convert a lead to an opportunity, the following rules may apply depending on the setup criteria for your company:

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

## What happens when I convert a lead to an opportunity using a smart action?

You can take actions on lead items from your list item by using the Actions menu (three dots on the right of the item) on the My List of Leads page.

For example, you can use the **Convert** quick action to convert a lead to an opportunity. In the **Convert Lead** window, you can change the opportunity name, enter an account and contact, and reassign opportunity ownership. When you click **Submit**, the application creates the new opportunity and you can view it from the Opportunities UI.

The conversion process copies key information from the lead into the opportunity and links the converted lead to the new opportunity. Copied information includes notes, interactions, and conversation messages from the lead activity stream.

## How can I copy notes, attachments, and activities during Lead to Opportunity conversion?

You can copy notes, attachments, and activities from a lead record to an opportunity record during the lead to opportunity conversion process. Your administrator must set the Standard Reference Copy Lead to Opportunity Map value to the Direct Lead to Opportunity Mapping profile option.

### *Related Topics*

- [Enable a User-Defined Copy Lead To Opportunity Map Value](#)

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

If you don't see the converted lead in your list of opportunities, this means that the opportunity is assigned to a different territory.

## How can I fix an invalid relationship error when converting leads?

If you try to convert a lead that contains an invalid contact relationship, you may receive an invalid relationship error during the conversion.

For example, you create a lead with a valid active primary contact and account. An issue might arise when you go to convert the lead if an incorrect relationship exists for a second contact on the lead. In such a scenario, you must deactivate the relationship and after some time try to convert the lead again.

However if you want the association of the lead and contact to remain, you must add the contact back on the lead through the **Contacts** tab on the **Edit Lead** page. Here's how to resolve the issue:

1. Navigate to the **Edit Lead** page.
2. In the Contacts tab, remove the second (nonprimary) contact.
3. Click **Save**.
4. Add the contact that you just removed back again to the lead.
5. Click **Save**.
6. Convert the lead.

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

Lead qualification determines whether a lead has a budget and project timeline defined, and indicates if someone with purchasing authority is identified. Company-specific standard questions and the associated scoring mechanism help to capture the additional data critical to qualifying leads.

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

### *Related Topics*

- [Examples of Lead Qualification](#)
- [Lead Assessments](#)
- [How Assessment Template Score Range is Calculated](#)



## What are assessment templates?

You can use assessments to evaluate the health of a business object, such as an opportunity or a lead.

Administrators set up assessment templates that consist of weighted questions and possible responses that get scored. After selecting the appropriate assessment type, you enter responses for all the questions in an assessment, and achieve a score once the assessment is submitted. This score is used to evaluate the health of the business object. For example, the score could help determine whether an opportunity is viable enough to offer the potential customer a discount.

### *Related Topics*

- [Overview of Assessments](#)

## Why does the sales channel default to Partner when I open a lead?

The sales channel of a lead indicates whether the lead is being handled directly by an internal salesperson (Direct), or indirectly (Partner) by an outside partner, such as a distributor or a reseller.

Depending on your configuration and business need, you can use different sales methods based on the sales channel value. For example, your sales channel defaults to **Partner** if your sales administrator has assigned you with either the MKL\_CONVERT\_SALES\_LEAD\_PRIV or the MKL\_SELECT\_SALES\_LEAD\_PRIMARY\_PARTNER\_PRIV functional privileges, or both.

In addition, your sales administrator can assign rules or create a groovy script to default the value of the **Sales Channel** without any modifications to privileges.



# 15 Responses

## Overview of Response Management

When prospects or contacts respond to an offer through a channel, such as inbound email, internet, or call center, the details are captured by the response management feature. You can review response details and convert qualified responses to sales leads.

You can then determine which responses to pursue as leads or which ones you can convert to opportunities.

Campaign channels can be different from response channels. Recipients of an internet campaign can respond through a call center. Recipients of a direct mail offer may respond by clicking a Web offer URL link. Responses are generated because of sales and marketing activities. Responses gathered from external call centers and suppliers are imported to your sales application.

Websites can capture response details, while phone calls or direct mail responses must be recorded manually. When these responses are recorded, you can import them. Inbound email replies aren't automatically captured as responses. You must configure your email response product to support inbound email processing. Each response type has several parameters that store details about a given response. You can modify an automatically captured response if you have permission. Responses are tracked for an offer and for a campaign.

## Response Management Summary

Responses are captured either through the file import feature, or they're automatically captured by recording the various clicks when opening emails associated with the marketing campaign. You can review imported and autogenerated responses and convert qualified responses to leads and opportunities.

## Response Management Features

You can create responses provided by prospects and contacts, and you can convert responses to leads and opportunities. You can record campaign responses to:

- Calculate campaign response rates
- Target promotional material to those prospects and contacts who are more receptive to offers
- Build a profile of prospects and contacts who responded to run targeted campaigns
- Extract and source key data from the responses to generate quality leads

## Differences Between Response, Lead, and Opportunity

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

Response	Lead	Opportunity
A response is an interaction initiated by the customer in response to a marketing stimulus. Every outbound sales activity is a sales stimulus.	A lead is an inquiry, referral, or other information, obtained through marketing campaigns, or other means that identifies: <ul style="list-style-type: none"> <li>Potential contact or prospect</li> <li>Specific purchase interest</li> </ul> You can create a lead if the specific purchase interest isn't known at the time. However, to qualify a lead you must record a primary purchase interest.	An opportunity is a pending sale of a product or service that can be forecasted and tracked using summary data such as: <ul style="list-style-type: none"> <li>Potential revenue</li> <li>Sales stage</li> <li>Win probability</li> <li>Expected close date</li> </ul>
Responses are created from interest recorded in response to sales activities. Responses include: <ul style="list-style-type: none"> <li>Providing answers to phone survey questions</li> <li>Subscribing to a list</li> <li>Replying to an email response form request</li> </ul> As interest for the product or service matures, responses are elevated as leads.	Leads are mostly created by automated lead capture or lead import processes which periodically create qualified responses as sales leads.  Leads are sometimes created from the response data of a contact or prospect who has expressed a need or interest in a product or service offered by the business.	Opportunities are created by sales administrators when they have identified a qualified lead with a potential revenue opportunity. Leads are converted to opportunities when significant sales investment is foreseen to close the deal.  A salesperson can create opportunities from scratch, without previously having a response or lead created.
Responses aren't included as part of the sales forecast.	Leads aren't included as part of the sales forecast.	Inclusion of opportunities in the sales forecast is at the discretion of the sales administrator. However, not all opportunities are included and the decision to include them may depend on your company's requirements.

## What's the difference between a response and an interaction?

A response signifies a recorded reaction of a prospect or contact to a sales or marketing activity. An interaction is a record of communication between your company and the prospect or contact or customer.

The following table outlines the key points about responses and interactions:

Responses	Interactions
A response can be converted into a sales lead for further qualification or sales opportunity to be pursued and included in sales forecasting.	An interaction is recorded when a communication occurs with customer contacts by means of any communication channel such as e-mail, phone, direct mail, or web.
Responses received by phone, e-mail, or web are saved and positive responses	An interaction is typically created for each outbound and inbound communication. An outbound communication is initiated by a company employee such as a salesperson by a phone call, or

Responses	Interactions
can be converted to sales leads and opportunities.	marketing manager by means of an e-mail campaign. An inbound communication is initiated by a prospect or contact by means of web activity or through a call center.
Responses are typically captured by automated processes or are imported in the application.	Interactions for a particular customer or contact can be viewed in Customer Center.
A response captures information specific to the sales or marketing activity such as source codes and specific destination URLs.	The channel details on a marketing treatment include the option to create interactions when a response is created.

## What happens when I convert a response to a lead?

A lead is created and becomes available for follow up from the Leads work area. As the user who converted the response to the lead, you're listed as the lead owner.



# 16 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	Here are just some of the data that sales teams can capture for an opportunity: <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

- [Overview of Opportunity Products and Revenue](#)
- [Best Practices for Sales Credits](#)
- [Overview of Sales Methods, Sales Stages, and Sales Coach](#)

## How to Apply Mass Update to Opportunities

Use the mass update feature to update several fields on multiple opportunities at once. For example, you can update the status or add comments for multiple opportunities without having to go into each individual record.

Among the fields that you can update are:

- Account
- Budgeted
- Close Date
- Comments
- Currency
- Date Budget Available
- Estimated Deal Duration
- Include in Forecast
- Level of Risk
- Owner
- Primary Competitor
- Primary Contact
- Sales Stage
- Status
- Win Probability
- Win/Loss Reason

These predefined fields can't have a blank value:

- Currency
- Close Date
- Sales Stage
- Include in Forecast

**Note:** Your administrator must enable this feature before it's available in the application.

## Steps to Apply Mass Update

Here's how to update several fields on multiple opportunities at once:

1. Navigate to the **Opportunities** landing page.
2. Search for the records you want to update.
3. Click **Update** from the **Actions** menu.
4. Select the records that you want to update and click the **Update** button.
5. Select the fields and assign or enter values for them. Keep in mind:
  - o If you want to update a field that has a parent field, then the value of the parent field must be the same across all child records selected for mass update.
  - o You can't apply mass update to conditionally updatable fields.
6. When you're done making updates click **Submit**.

#### Related Topics

- [How do I enable mass update of records?](#)

## FAQs for Opportunities

### Frequently Asked Questions (FAQs) for Opportunities

This section contains some frequently asked questions (FAQs) for Opportunities. Scroll or search to find answers to common questions.

#### What opportunities are displayed for My Open Opportunities and Open opportunities where I am on the team?

Selecting My Open Opportunities displays a list of all open opportunities expected to close within the current calendar or fiscal period where you're listed as the opportunity owner.

You're automatically the opportunity owner if you created the opportunity. You also can be assigned as the owner by someone else.

Selecting the **Open opportunities where I am on the team** list displays a list of all of the open opportunities expected to close within the current calendar or fiscal period where you're on the opportunity team. You're on the opportunity team if you created the opportunity or you can be assigned to the team either by an automatic assignment process or by another team member.

#### What do the opportunity saved searches mean?

In the opportunities landing page, several different saved searches retrieve specific sets of records. Here's a list of the record sets. Not all record sets are available to all users.

For example, the record sets involving subordinates, which are resources within an organization or a line manager's hierarchy, are available only to managers.

**Note:** The **My territory membership** and **My territory membership hierarchy** record sets are predefined but you must enable them before your salespeople can use them.

Record Set Name	Description
All records I can see	Opportunities that you can view based on any of the following: <ul style="list-style-type: none"> <li>Your opportunity team membership</li> <li>Sales territory assignments on opportunity, customer, or partner accounts</li> <li>Your position in the organization</li> <li>Security permissions</li> </ul>
I own	Opportunities you own include those opportunities you created or where ownership is assigned to you.
I am on the team	Opportunities where you're on the opportunity team. You're on the opportunity team if you're the opportunity owner or if you were added as a member.
My territory	Opportunities within sales territories you own.
My territory hierarchy	Opportunities within sales territories where you're the territory owner or the descendant territory owner.
My territory membership	Opportunities for your territory where you're either the owner or a team member of a territory assigned to the opportunity.
My territory membership hierarchy	Opportunities for your sales territories where you're the territory owner or member and all of your subordinate territories in the sales territory hierarchy assigned to the opportunity.
My subordinates own	Opportunities owned by you and your subordinates (resources within your organization).
My subordinates are on the team	Opportunities where you or your subordinates (resources within your organization) are on the opportunity team.

*Related Topics*

- [Enable Opportunity Search Filter Record Set Values for Territory Membership](#)

## Can I sort opportunity searches by the last update date?

Yes, you can sort the records returned from your opportunity search by last updated date in descending order. Request your administrator to change the Opportunity List Sort profile option from N to Y. You can then quickly review and action recently updated opportunities.

## Can I create opportunity lists from territory membership record sets?

Yes, you can use record sets to create opportunity lists based on both territory membership and territory membership hierarchy filtering criteria.

For example, you can now create lists for opportunities for your territory where you're the territory owner or a team member of a territory assigned to the opportunity. If you're a manager, you can filter records where you're 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.

Request your administrator to enable the **My territory membership** and **My territory membership hierarchy** values to display in the opportunity search filter record sets.

### *Related Topics*

- [Enable Opportunity Search Filter Record Set Values for Territory Membership](#)

## What information is required to create an opportunity?

Opportunity Name is the only field required to be filled out when creating an opportunity. Note, however, that the name and sales account combination must be unique.

In other words, you can't have two opportunities with exactly the same name and associated to the same sales account.

## What happens if I change win probability?

If you change win probability at the opportunity level, the application updates the win probability of all opportunity product lines that are in sync.

In addition, if you update win probability at the product level, the product lines included in the forecast may change, depending on whether the line matches forecast criteria or not.

## Can I select more than one account address when creating an opportunity?

No, currently you can only select the primary address of the Account associated with the opportunity when creating or editing an opportunity. Only the primary address of the Account will be displayed on the opportunity.

It isn't possible to select any other Account addresses from the opportunity page.

## Which fields or data are initially set on an opportunity?

Several fields are initially set to default values when you create an opportunity, as described in this topic.

Following are the fields initially set to default values when you create an opportunity:

- Sales Channel: Set to Direct
- Currency: Determined by the settings in user preferences
- Win Probability: Set to percentage determined by sales method or profile option
- Close Date: Set to 90 days from creation date
- Status: Set to Open
- Sales Method: Set to default sales method
- Sales Stage: Set to first sales stage in default sales method
- Owner: Set to user creating opportunity
- Revenue: Set to zero
- Worst Case: Set to zero
- Best Case: Set to zero
- Opportunity Number: Unique, application-generated number
- Created By: Set to user creating opportunity
- Creation Date: Set to current date
- Include in Forecast: Based on forecast settings

## What's a billing account on an opportunity?

A billing account on an opportunity is the customer's financial account to be used for the transaction. This field only displays the billing accounts if you have an Account associated with the opportunity.

The billing account won't display any values if you only have a Contact associated with the opportunity. For example, if you select the business-to-consumer (B2C) contact on the Account, then the billing account field displays the corresponding billing account but no value is shown if you select the normal contact on the Primary Contact field.

## How do I delete an opportunity?

To delete an opportunity, open it for editing and click Delete Opportunity from the Actions menu.

After you delete an opportunity, it's no longer available in the application.

## How can I copy an opportunity?

While viewing the opportunity details, select Copy Opportunity from the Actions menu and enter a new, unique name for the opportunity.

### Related Topics

- [What is copied when I copy an opportunity?](#)

## What is copied when I copy an opportunity?

The application copies the following attributes when you copy an opportunity:

- Opportunity header attributes, including standard and user-defined fields
- Contacts
- Products:
  - Revenue information, such as quantity, unit price, revenue amount
  - Schedule information and the underlying scheduled transactions
  - Sales credits, including recipients, amounts, and percentages
  - User-defined attributes of revenue
- Sales team, including partner resources
- Source
- Partners
- References
- Competitors
- Leads
- User-defined child objects of the opportunity

The following aren't copied:

- Notes
- Tasks
- Appointments
- Assessments
- Attachments
- Deal registrations

### Related Topics

- [How can I copy an opportunity?](#)

## Can I move Opportunities to different Business Units?

Yes, you can update the Business Unit field for opportunities from the UI. Move an opportunity to a different business unit simply by selecting the target business unit while editing the opportunity.

After you change the business unit for the opportunity, any dependent opportunity attributes are reset to the default values of the new business unit.

Your administration can also move Opportunities to different Business Units using import management or web services.

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

When you move an opportunity from one sales stage to the next, the opportunity-level win probability increases to reflect the progress of the opportunity.

The win probabilities of all product lines that are in sync with the opportunity-level win probability also change to match the opportunity-level probability. During setup, the application administrator can specify the default win probability for each sales stage.

## What happens to the conversion rate when an open or closed opportunity is changed?

When an open opportunity is updated, its conversion rate to the corporate currency is updated to the opportunity currency's rate on the current date.

When a closed opportunity is updated, its conversion rate is updated to the rate on the opportunity's actual close date.

### *Related Topics*

- [Set Up Multiple Currencies for Sales](#)
- [How do I allow salespeople select a different currency in Opportunities and Leads?](#)

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

When defining a sales method, administrators can insert the average close window of the sales method, in days. The value is then used to set the default close date of opportunities using that sales method.

## What happens to forecasted revenue when an opportunity is changed?

The current forecast is automatically updated to reflect the changes. Past forecasts remain unchanged. Scheduled processes synchronize changes to territories and update active forecasts.

### Related Topics

- [Forecast Synchronization](#)

## How To View Renewal Opportunities

Oracle CPQ checks for subscriptions that are due to expire soon and automatically creates opportunities of type 'renewal'. You can see them in the Opportunities list of the sales application.

Here are the steps to see the renewal opportunities:

1. Navigate to **Sales > Opportunities**.

On the landing page, the **Opportunity Type** column indicates 'renewal' against the renewal opportunities that have been populated from Oracle CPQ.

2. Click a renewal opportunity to identify the revenue lines that are due for renewal.

In the Details page, under **Products**, the **Revenue Type Category** indicates if the revenue lines are Renew, New or Expansion. You can also distinguish new and renewal pipeline forecasts as separate categories for tracking and managing the sales forecasts based on the revenue type category values.

**Note:** You can create renewal opportunities manually as well. When creating an opportunity, select Renewal from the Opportunity Type drop-down list. The other opportunity types you can create are New and Expansion. Create an Expansion opportunity when a customer wants to buy more products or expand services in their regular subscriptions.

## Use Slack for Opportunities

### View Your Opportunities in Slack

Slack is a team communication tool that facilitates synchronous communication across different devices. Regardless of whether your team is co-located or distributed, Slack provides an effective communication channel that's easy to use.

Let's say you would like to quickly review a list of the main opportunities owned by you and take some actions. You can do all this on Slack using any device, without signing in to your sales application.



**Note:** The only criterion is that your administrator has set up the integration of Slack with your sales application.

You can view the list of the top five opportunities owned by you with the close date in the current fiscal quarter. You can also log a call, create a task, or schedule a meeting for each listed opportunity.

To view your top five opportunities with the close date in the current fiscal quarter in Slack:

1. Navigate to your workspace in Slack.
2. Select one of the following:
  - o Any public channel in the Slack workspace
  - o Slackbot
  - o Oracle Sales Slack app: This refers to the app that your administrator has created in Slack for integrating with your sales application.

**Note:** Due to security restrictions, you can't view your opportunities if you select the following:

- o Private channels
- o Any user under direct messages

3. Enter the following command at the command line: `/ec-my-opportunities`
4. Press Enter.

Your top five opportunities are displayed. The following fields are displayed for each opportunity:

- o Stage: For example, Qualification or Closed
- o Close Date
- o Account
- o Win Probability (%)
- o Amount
- o Currency Code
- o Recommended Action

**Note:** Every sales representative who executes the `/ec-my-opportunities` command can see only the opportunities owned by him or her. So you can't view the opportunities owned by other sales representatives. Moreover, your opportunities are only visible to you and not to any other user.

## Create a Task for Your Opportunity from Slack

You can create tasks for your top five opportunities in Slack. When you create a task in Slack, you're the default owner of the task.

If you want to assign the task to someone else, you can do so only in your sales application, and not from Slack.

To create a task for your opportunity from Slack:

1. Use the `/ec-my-opportunities` command in Slack to view a list of your top five opportunities.

For more information about how to use the command, see "View Your Opportunities in Slack".

2. Navigate to the opportunity for which you want to create a task.
3. Click **Create a Task**.
4. In the **Create a Task** dialog box, enter a subject in the **Subject** field.

For example: Follow up with customer.

5. In the **Due Date** field, enter the date and time for the task.

**Note:** Ensure that you specify the date and time only in the following format: YYYY-MM-DD HH:MM AM or PM. For example: 2019-08-16 09:15 AM The time zone that you have set in your Slack profile is used.

6. From the **Type** drop-down list, select the type of task.
7. From the **Priority** drop-down list, select a priority for this task.
8. In the **Description** field, enter a description for the task.
9. Click **Submit** to complete the process or click **Cancel** to discard it.

After you create a task, it shows up among the **Open Activities** in the Activities tab of this opportunity in your sales application.

#### Related Topics

- [View Your Opportunities in Slack](#)

## Log a Call for Your Opportunity from Slack

After you complete a call with your customer, you can also log the call details from Slack.

To log a call for your opportunity from Slack:

1. Use the `/ec-my-opportunities` command in Slack to view a list of your top five opportunities.

For more information about how to use the command, see "View Your Opportunities in Slack".

2. Navigate to the opportunity for which you want to log a call.
3. Click **Log a Call**.
4. In the **Log a Call** dialog box, enter a subject in the **Subject** field.
5. From the **Priority** drop-down list, select a priority for the call.
6. In the **Description** box, enter a description for the call.
7. Click **Submit** to complete the process or click **Cancel** to discard it.

After you log a call, it shows up among the **Completed Activities** in the Activities tab of this opportunity in your sales application.

#### Related Topics

- [View Your Opportunities in Slack](#)

## Schedule a Meeting for Your Opportunity from Slack

You can schedule a meeting for your opportunity from Slack.

Here's how:

1. Use the `/ec-my-opportunities` command in Slack to view a list of your top five opportunities.  
For more information about how to use the command, see "View Your Opportunities in Slack".
2. Navigate to the opportunity for which you want to schedule a meeting.
3. Click **Schedule Meeting**.
4. In the **Schedule Meeting** dialog box, enter a subject in the **Subject** field.
5. In the **Start Date** field, enter the start date and time for the meeting.  

**Note:** For both the start date and end date, ensure that you specify the date and time only in the following format: YYYY-MM-DD HH:MM AM or PM. For example: 2019-08-16 09:15 AM The time zone that you have set in your Slack profile is used.
6. In the **End Date** field, enter the end date and time for the meeting.
7. In the **Description** field, enter a description for the meeting.

## Recommended Actions

### Overview of Recommended Actions for Opportunities

Opportunities allow organizations to support the full sales process, from leads, to opportunities, to sales, to follow-up analytics. Within opportunities, sales organizations use the supplied sales methods and sales stages to step the opportunity to its eventual conclusion.

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 recommended actions. For example, setting win probability variance thresholds and providing multiple recommendations per opportunity help sales representatives optimize their sales opportunities.

Using the recommended actions feature lets sales representatives know which opportunities to focus on, which ones are at risk to close, and specifically, what's the next best recommended action to take to close opportunities.

Your administrator must enable the Enable Adaptive Intelligence profile option (ZCA\_ENABLE\_ADAPTIVE\_INTELLIGENCE) and extend the opportunity detail page to display the Recommended Actions section and related steps in the opportunities UI.

This table lists some of the ways recommended actions can help close deals.

Feature	Details
Smarter sales experiences and optimizes the selling process	Helps you identify best opportunities to pursue based on: <ul style="list-style-type: none"> <li>• Current and past deal assessments</li> </ul>

Feature	Details
	<ul style="list-style-type: none"> <li>• Opportunities needing most attention</li> <li>• Sales volatility</li> </ul>
Multiple recommendations per opportunity	<p>Prompts you to respond to the next best set of actions to help you engage with your customer and further extend the sales pipeline. For example, provide the relevant data to:</p> <ul style="list-style-type: none"> <li>• Perform competitive analysis through competitive data alert messages.</li> <li>• Initiate a follow-up call with the customer.</li> <li>• Focus on the top five deals, to reduce sales volatility.</li> <li>• Determine the likelihood of closing an opportunity.</li> <li>• Provide 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>
User feedback per opportunity	<p>Lets you provide feedback, such as to how helpful, or not, are the recommended next best actions provided for the opportunity. Salespeople can select the recommended action they completed or signify whether or not the suggested action was helpful.</p>
Administrative controls	<p>Enables sales administrators to manage the win probability variance thresholds for opportunities. As you update the opportunity information, the application regenerates win likelihood probability and recommended actions.</p>

You must complete the following configuration steps in Oracle CX Sales to ensure that recommendations are displayed on opportunities:

- Update relevant profile options.
- Add the Recommended Action column to the Opportunities page using Application Composer.

For more information, see [Set Up Best Sales Action for Opportunities](#).

#### Related Topics

- [Overview of Opportunities](#)
- [Recommended Actions for Opportunities](#)

## Recommended Actions for Opportunities

Recommended actions in opportunities are prompts that provide you with suggestions about how to reduce the risk of opportunities being lost. The prompts, which leverage artificial intelligence data, guides you by suggesting which actions can improve the likelihood of winning and closing deals.

You can regenerate the win likelihood and recommended actions by providing feedback and updating information for the opportunity.

## Recommended Actions

Using artificial intelligence, system learning, and other data science capabilities, optimized recommended actions and predicted win likelihood data is presented to you for opportunities. Recommended actions provide insights into the possible issues in the opportunity and suggest recommended actions to improve your chances of winning the opportunity. You engage with those opportunities requiring the most attention and move them to the next sales stage. For example, suppose the role marked as the primary contact on an opportunity correlates with a low win rate in the past. The reason might be that this contact isn't the decision maker in the customer organization. Therefore, the artificial intelligent algorithm recommends that you check that the primary contact is the decision maker.

Other examples of recommended actions include:

- Schedule an appointment
- Focus on the top five deals to reduce sales volatility
- Perform competitive analysis
- Other opportunity-specific recommended actions prompted to move a deal to the next sales stage and closer to a win

## Feedback on Recommended Actions

When you select a recommended action for a specific opportunity, a dialog box appears which provides additional information about the recommended action. There's also a link to any additional recommended actions to take for the selected opportunity. After reading the explanation or after you perform the action, you can indicate if the suggestion was helpful or not. You can also indicate whether the recommended actions were helpful with moving the opportunity to the next stage.

You provide feedback by clicking either **Good Suggestion** or **Not Helpful**. As soon as you provide your feedback, the recommendation isn't visible anymore.

## Create a Task from Recommended Actions

You can create a task for each recommended action by clicking the **Task** icon from the contextual Recommendations dialog box. You can also create a task from the edit opportunity's recommended region page by clicking **Create Task** to create a related task for yourself.

### Related Topics

- [What's the difference between win probability and predicted win probability?](#)
- [Overview of Recommended Actions for Opportunities](#)

## What's the difference between win probability and predicted win probability?

Win probability represents the likelihood (in percent form) of winning the opportunity. You manually set the win probability at the opportunity level for the sales stage.

If you don't want your sales stages to control opportunity win probability, make sure that no value exists in the win probability field. The predicted win probability displays the automated predicted win probability based on artificial intelligence (AI), system learning, and other data science capabilities. It provides a percentage of the predicted win probability in comparison to other opportunities from your sales organization or a prediction about the close date of

the opportunity. For example, the artificial intelligent models might suggest a win probability for an opportunity that's significantly different to the salesperson's estimation. In that case, your sales application displays a warning icon on the Opportunities page.

You can hover over a warning indicator icon next to the **Win Probability (%)** field which is displayed only when the differences between the win probability percentage value and the predicted win probability percentage value is greater than the defined threshold. The text is read only and displays both win and AI predicted probability values as well as the Opportunity name.

#### Related Topics

- [Recommended Actions for Opportunities](#)
- [Overview of Recommended Actions for Opportunities](#)
- [Edit the Opportunity Win Probability Risk Threshold Profile Option](#)

## What's the difference between Recommended Actions, Action Items, and Recommended Documents?

Recommended actions in opportunities are the next best sales recommendations for you to follow. Helping you manage your pipeline, recommended actions are based on account intelligence, sales actions, and historical sales analysis.

Action items and recommended documents are coaching components or job aids associated with a specific sales stage. Each sales stage potentially can have multiple action items and recommended documents associated with it.

Action items are steps you should follow during a sales stage. For example, your company might recommend that you interview a potential customer, develop a product list, and schedule a presentation for a product launch.

Recommended documents are helpful documents and resources, such as customer letter templates, relevant websites, and training materials.

#### Related Topics

- [Recommended Actions for Opportunities](#)

## Opportunity Team Members

### Add Team Members to an Opportunity

You must have Full or Edit access control privileges to add or remove team members to or from an opportunity. From the opportunity team page, you can add team members to the opportunity team.



You can also view assigned territories and the associated territory team members on the opportunity team by selecting Territories from the **Show** list of values. With View Only access, you can view team members but not update them.

## Add a Member to an Opportunity

As owner of the opportunity, you're listed on the opportunity team page as the owner with Full access.

Here's how to add a member to an opportunity.

1. Sign in to the application as a user with access to opportunities, such as a salesperson or sales manager.
2. Navigate to **Sales > Opportunities**.

The opportunity landing page displays your opportunities.

3. Find an opportunity and edit it. Or, create an opportunity and save and edit it.
4. From the Edit Opportunity page, click the **Team** icon to open the Team page.
5. Click **Add Team Members**.
6. Search for the team member you want to add to your opportunity team.
7. Select the team member you want from the **Search Results**, then click **OK**.
8. Select the access level control for the team member's privileges from the **Access** list of values.
9. Select the function for the team member from the **Function** list of values.
10. Click **Save** to add the team member to the opportunity team.

You can change the primary owner of the opportunity by selecting **Owner** from the team page.

**Note:** You can remove a team member from the opportunity team by clicking the delete icon represented by X next to the team member. However, you can't remove the owner from the opportunity team.

### Related Topics

- [Account Team Member Access Levels](#)

## How can I collaborate on Opportunities using Microsoft Teams?

Directly from an opportunity, click the Create Team in Microsoft Teams action and then build the team with internal resources and external users for the opportunity in Microsoft Teams.

Any team member who's both part of the Opportunity resource team and is a Microsoft Teams user is added to the created team. Management resources aren't added to the team.

In Microsoft Teams, teams can be public or private. A private team can only be accessed by the team members. Teams created from an opportunity in CX Sales are always private teams. Any opportunity team member can create the team in Microsoft Teams but only one team can be created per opportunity. Once you have successfully created your team, the **Create Team in Microsoft Teams** action on the Edit Opportunity actions list automatically changes to the **Go to Microsoft Teams** action.

### Related Topics

- [Add Actions for Microsoft Teams to Opportunity and Business Plan Actions Menus](#)

## What happens to the Microsoft team I created, when an opportunity closes?

If your administrator has enabled auto-archiving of teams of closed opportunities, the teams you have created in Microsoft Teams are auto-archived when the corresponding opportunities close in CX Sales.

To see the team of the closed opportunity, go to **Microsoft Teams > Archived**. You can see your team in the Archived list.

**Note:** The team in Microsoft Teams is restored when the associated opportunity reopens in CX Sales.

## Re-create a Team for an Opportunity Team in Microsoft Teams

When you create an opportunity team from your sales application, the **Create Team in Microsoft Teams** action on the Edit Opportunity actions list automatically changes to the **Go to Microsoft Teams** action.

If for some reason, the original team no longer exists in Microsoft Teams, the Go to Microsoft Teams action triggers re-creation of the team and saves it to the opportunity. When you click the action again, it automatically opens the new team created in Microsoft Teams.

This allows salespeople to continue to collaborate with each other on the reopened opportunity.

## Sales Coach

### Overview of Sales Coach

Sales Coach is a mechanism to present best practice sales methodology and teaching aids to help improve your sales effectiveness.

 [Watch video](#)

Application administrators set up Sales Coach by associating action items and recommended documents with a sales stage. You can then view these items as you progress your opportunities. The coaching 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 areas that administrators can define for each sales stage:

- Action items (process steps)
- Recommended documents



## Action Items

Action items are steps you should follow during a sales stage. For example, your company might recommend that you interview a potential customer, develop a product list, and schedule a presentation for a product launch.

## Recommended Documents

Recommended documents are helpful documents and resources, such as customer letter templates, relevant websites, and training materials.

### *Related Topics*

- [Overview of Recommended Actions for Opportunities](#)
- [Overview of Sales Methods, Sales Stages, and Sales Coach](#)

# Opportunity Access

## 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:

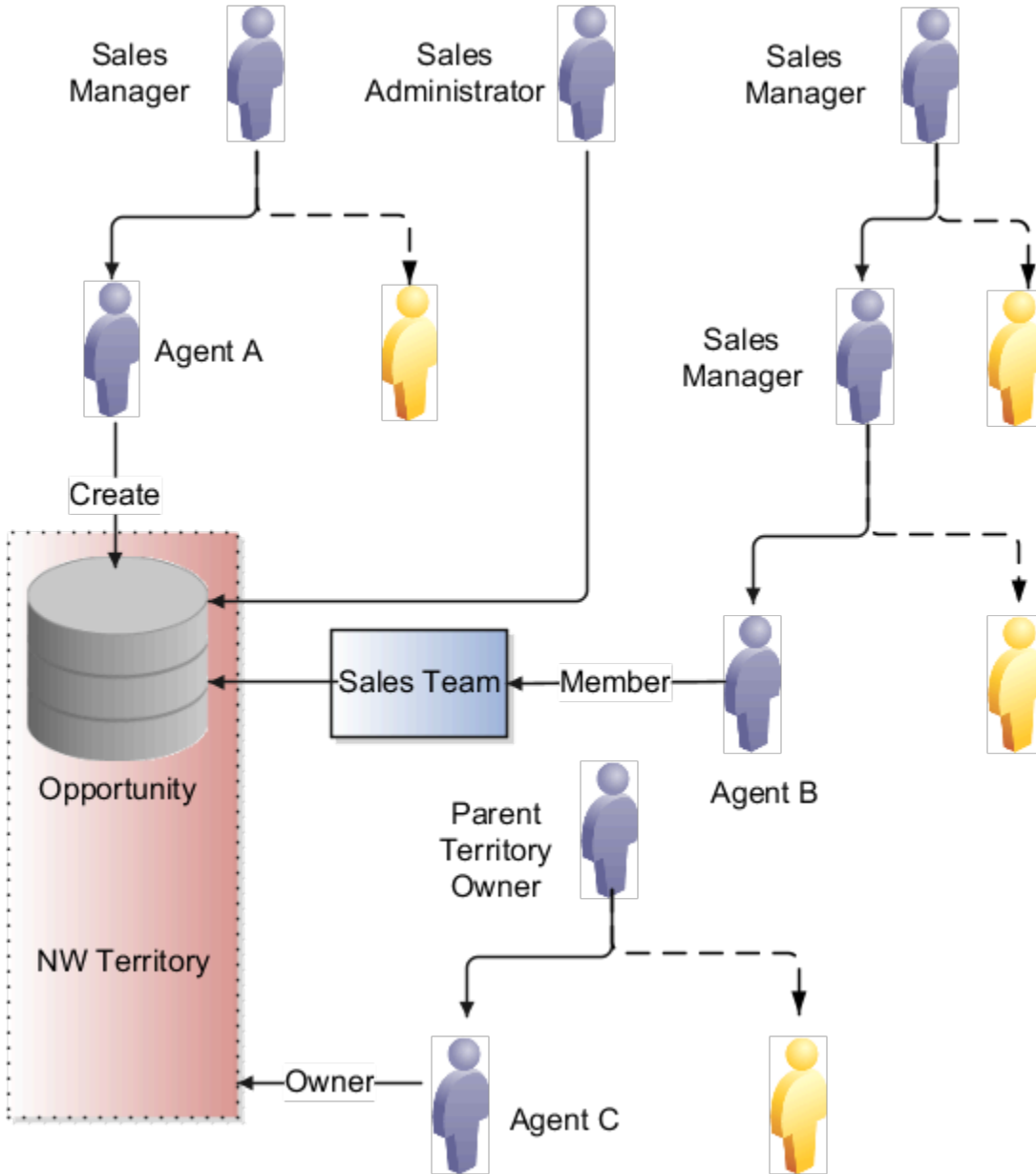
- An opportunity owner gets full access to the opportunity, which includes the ability to edit as well as add and remove team members.
- Owners and members of territories or parent territories assigned to the opportunity account get read-only access to the opportunity and aren't added to the opportunity 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.

## Why can't I edit some fields for an opportunity?

Salespeople can see all opportunities related to their accounts. However, depending on how your opportunity access profile has been set up, your access may be different between territory members and opportunity members.

If you're listed as the owner of the opportunity, you have full access to the opportunity, which includes the ability to edit as well as add and remove team members. If you're a territory or ancestor territory member assigned to the account of the opportunity, you can edit some fields in the opportunity record, but you can't make changes to the team or change the record ownership.

For example, the following fields in the edit opportunity page aren't editable for territory or ancestor territory members:

- Name
- Account
- Primary Contact
- Owner
- Status
- Currency
- Sales method
- Sales Stage
- Primary Source

### Related Topics

- [How Sales Users Gain Access to Sales Information](#)

## Why can't I see the Partners tab and Primary Partner field when I edit an opportunity?

When editing an opportunity, you need the right privileges to see partner information. The Primary Partner field and Partner subtab are secured by the privilege MOO\_MANAGE\_OPPORTUNITY\_PARTNERS\_PRIV and are only visible to users who have a job role that includes this privilege.

## Sales Competitors

### Overview of Sales Competitors

Want your team to get insight into the competition while working deals? It's easy -- simply set up your competitor records and then associate competitors with your opportunities.

After you add information on the competition and associate competitors with opportunities, you and the rest of your sales team can access to important competitor data that can help you more effectively close deals.

Here's the type of details you can store on the competition:

- Company details, such as stock symbol, website, industry, and geography
- Perceived threat level, such as high, medium, or low
- Experts who have knowledge about the competitor
- Collateral about the competitor, such as data sheets and the like
- Opportunities where the competitor is associated
- Revenue at stake, which is potential revenue that could be lost
- Notes about the competitor

### Link Competitors with Opportunities

When you're ready to enter competitor information on a deal, link competitors at the opportunity-level or at the product-line level. Once linked, the competitor and opportunity are associated in the competitor's profile screens (available in the Competitor pages of Sales, outside of the opportunities UI). The revenue amount entered on an opportunity drives the revenue-at-stake metric, also available in the competitor profile screens. See the related topics for more information.

#### *Related Topics*

- [Associate Competitors with Opportunities](#)
- [View Competitor Information Outside Opportunities](#)

## View Competitor Information Outside Opportunities

Sales administrators can store a many details about sales competitor companies. As a salesperson, you can associate competitors with opportunities to get insight into which competitors may have won a deal against your company.

You can also use competitor details when you want specific information about a competitor during a sales deal. Here's how to view competitor information:

1. Navigate to **Sales > Competitors**.
2. Select a competitor in the list and view the details.
3. Here's a summary of information that gets stored about competitors in their profiles:

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.

Field	Description
Privately Owned	Indicates the competitor company is privately owned.
Minority Owned	Indicates that the competitor company is minority owned.
Small Business	Indicates that the competitor company is a small business.
Status	Status of the competitor record, either active or inactive.

This table shows the information available in the details tabs of the Edit Competitor page:

Item	Description
SWOT Analysis	Strength, weakness, opportunity, and threat (SWOT) value for a competitor. This analysis helps you understand, plan, and craft an effective competitive strategy when facing a competitive threat on a deal.
Product groups	Product groups the competitor company is associated with. You can associate product groups using the Competitive Presence node in the desktop UI customer pages.
Opportunities	View historical and current opportunities associated with the competitor.
Attachments	Attachments are files, free-form text, or URLs that can give you information that helps you position products or solutions against specific competitors.
Internal Experts	Internal experts are people in your company who are experts on the competitor.
Geographies	Geographies where the competitor company is present.
Industries	Industries where the competitor competes with your company.

You can also view revenue at stake for the competitor. The Revenue at Stake area in the Edit Competitor page shows the revenue that potentially could be lost to the competitor. The data comes from product or product group revenue on the opportunities where the customer is present.

You may want to view notes associated with the competitor, if entered by the administrator. Notes are stored in the contextual area of the Edit Competitor page.

### Related Topics

- [Overview of Sales Competitors](#)
- [Associate Competitors with Opportunities](#)

## Associate Competitors with Opportunities

Capture the competitive information for a deal when you associate competitors with an opportunity, either at the header-level or product-line level.

### Associate Competitors at the Opportunity Level

Here's how you associate a competitor at the opportunity level:

1. Sign in as a sales user, such as a salesperson or sales manager.
2. From the **Sales > Opportunities** page, drill into an opportunity.
3. Depending on how the application is configured, you can access competitors on an opportunity by:
  - Use the Competitors subtab: If it's enabled, click the **Competitors** subtab and make your changes in the Competitors page.
  - Use the Primary Competitor or Competitors field: If they're enabled, these fields appear in the edit page.
4. In the competitor association pages, you can:
  - Search for and select a competitors to add to the opportunity.
  - Remove competitors from the opportunity.
5. Save your changes.

**Note:** To associate multiple competitors with an opportunity, more than one competitor must be set up in the application. Competitors are set up by the administrator.

### Associate Competitors at the Product-Line Level

Here's how you associate a competitor at the product-line level on an opportunity:

Prerequisites:

- More than one competitor must be set up by the administrator.
  - The administrator must have enabled the Competitor field in the Products table using Application Composer.
  - To select a competitor in the Competitor list in the Products table, it must first have been associated with the opportunity at the opportunity level. Competitors won't show up in the list of values in the Products table unless they were first added to the opportunity at the header level.
1. From the Opportunities list, click the name of an opportunity to edit it.
  2. In the Primary Competitor list, click **Search**.
  3. Search for and select a competitor.
  4. Click **OK**.
  5. Save your changes.
  6. Add a product line to the table.

7. In the **Competitor** list of values, select a competitor.
8. Save your changes.
9. Repeat this procedure to add more competitors.

*Related Topics*

- [Overview of Sales Competitors](#)
- [View Competitor Information Outside Opportunities](#)

## FAQs for Sales Competitors

### Frequently Asked Questions (FAQs) for Sales Competitors

This section contains some frequently asked questions (FAQs) for sales competitors. Scroll or search to find answers to common questions.

#### How can I see the opportunities that I lost to a competitor?

Look at the competitor record details. It includes a consolidated view of past and current opportunities where the competitor is at play. It gives you important details so that you can plan future sales strategies.

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

Use competitor analysis graphs to see why opportunities were won or lost. You can also analyze the reasons for losing or winning against specific competitors. As a sales manager, you can use this analysis to improve your overall deal success rates and revenues.

For more information, see the [Creating and Administering Analytics](#) guide.

*Related Topics*

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

Take a look at the Win Loss Trends report. It displays opportunity revenue won by your organization against competitors. The report shows the number of wins and losses and closed-won opportunity revenue by quarter and by competitor.

The report can also show overall opportunity won revenue and number of wins and losses regardless of whether there was a competitor on the opportunity. For more information, see the [Creating and Administering Analytics](#) guide.



### Related Topics

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

Take a look at the list of your colleagues on the Internal Experts tab. The list contains experts who know something about the competitor.

## What's SWOT?

SWOT stands for: Strengths, Weaknesses, Opportunities, and Threats. The SWOT attribute in the Competitors feature of your sales application gives organizations a way to examine the strengths, weaknesses, opportunities, and threats of a competitor.

## FAQs for Opportunity Assignment

### Frequently Asked Questions (FAQs) for Opportunity Assignment

This section contains some frequently asked questions (FAQs) for opportunity assignment. Scroll or search to find answers to common questions.

## 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?](#)

## 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.

## Opportunity Closure

### Considerations for Closing an Opportunity

You can close opportunities as needed, for example, when they're won, lost, or no longer active.

When closing an opportunity, you may be required to enter a win/loss reason and a competitor, if enabled during setup.

There are two ways to close an opportunity:

- Use the edit opportunity UI: See the topic, [Close an Opportunity Using Edit Opportunity UI](#), for more information.
- Use the update feature: See the topic, [Close Multiple Opportunities](#), for more information.

#### *Related Topics*

- [Close an Opportunity Using the Edit Opportunity UI](#)
- [Close Multiple Opportunities](#)

## Close an Opportunity Using the Edit Opportunity UI

You can use the Edit Opportunity page to close an opportunity by setting its status to one of the closed status categories and entering any required information.

### Close an Opportunity

Here's how to close an opportunity from the Edit Opportunity page.

1. Sign in as a salesperson and navigate to **Sales > Opportunities**.

The opportunity landing page displays the list of your opportunities.

2. Find an opportunity and edit it.
3. From the **Status** field, select a status that belongs to a Closed status category. For example, select **Won**.

The **Close Date** field changes to the current date.

The **Win/Loss Reason** field becomes active.

**Note:** Depending how your administrator configured the closing action, the Win/Loss Reason and Competitor fields may or may not require your input.

4. Select a **Win/Loss Reason**, if required.
5. Select a **Competitor**.

This screenshot shows an example of the applicable fields when closing an opportunity in the Edit Opportunity

The screenshot displays the 'Edit Opportunity' form for an opportunity named 'Tablets Opportunity'. The form is divided into two columns. The left column contains fields for 'Name' (Tablets Opportunity), 'Customer' (with a search icon), 'Primary Contact', 'Win Probability (%)' (100), 'Include in Forecast' (When matches forecast criteria), and 'Attachments' (None). The right column contains fields for 'Win/Loss Reason' (Good lead), 'Revenue' (40,000.00), '\* Close Date' (8/11/14), '\* Primary Competitor' (Argon Networks), 'Sales Method' (Standard Sales Process), 'Sales Stage' (07 - Closed), and 'Opportunity Type'. A red box highlights the 'Status' dropdown menu at the bottom left, which is currently set to 'Won'. Another red box highlights the 'Win/Loss Reason' dropdown menu at the top right, which is set to 'Good lead'. A third red box highlights the '\* Primary Competitor' dropdown menu in the middle right, which is set to 'Argon Networks'. A fourth red box highlights the '\* Close Date' field, which is set to '8/11/14'.

page.

6. Click **Save** or **Save and Close**.

**Tip:** You can find closed opportunities by searching for them using the search utility.

#### Related Topics

- [Close Multiple Opportunities](#)

## Close Multiple Opportunities

You can select several opportunities in the opportunity list and close them at once. You must have Full or Edit access to the opportunities to update them.

### Close Multiple Opportunities at Once

Here's how to close multiple opportunities at once.

**Note:** If Competitor is a required field in the close opportunity flow, the opportunities you update must already have competitors associated with them before you attempt to update them.

1. Sign in as a salesperson and navigate to **Sales > Opportunities**.
2. In the **Opportunities** overview (also called the landing page or list page), enter the search criteria for the opportunities that you want to close, and click **Search**.

The application returns a list of results based on your search criteria.

3. From the **Actions** menu, click **Update**.
4. Select the opportunities you want to close.

To select multiple opportunities, hold the **Ctrl** key down as you select them. You can click the **Select All** link if you want to close all the opportunities up to a maximum of 25. Click **Deselect All** to undo your selection.

5. After you have made your selections, click the **Update** button.

The Update Opportunities page appears. The page title indicates how many opportunities you're updating.

6. From the **Field** drop-down list, select **Status**.

After you make your selection, the application activates the corresponding **Value** column for data entry or selection.

7. Select one of the values that belongs to a Closed status category. For example, select **Won**.
8. Enter a Win/Loss Reason, if enabled as required by your administrator.
9. If you want to enter a date to close your selected opportunities, enter **Close Date** in the **Field** drop-down list. Then enter a date to close the opportunities from the corresponding **Value** field.
10. Click **Add** if you want to add more fields to update for your closed opportunities.
11. Click **Submit** to commit the changes.

A page appears, confirming that the changes were successfully applied.

12. Click **Close** in the confirmation page to return to the overview page.

#### Related Topics

- [Close an Opportunity Using the Edit Opportunity UI](#)
- [Opportunity and Product Line Attributes Synchronization](#)

## Examples of Using Opportunity Search Close Period and Close Date Range Fields

The opportunity search fields Close Period and Close Date Range can be used together or separately.

Use the **Close Period** field to set the calendar period for the opportunity close date. Predefined values are Current Quarter, Previous Quarter, Next Quarter, Previous and Current Quarter, Current and Next Quarter. When you set a value in this field, the **Close Date Range** field automatically changes to the dates for the calendar period.

To use the Close Date Range separately, enter your own **Close Date Range** values instead. The application clears the **Close Period** list so that it displays nothing.

### Examples of Field Actions

Here's an example of the Close Date Range and Close Date fields working together:

- The CRM calendar is defined as:
  - Q1 2014 - January 1 to March 31
  - Q2 2014 - April 1 to June 30
- In January 2014, you select **Current Quarter** in the Close Period field.
  - The application sets the default Close Date range as 01/31/2013 to 3/31/2013.

Here's an example of using the Close Date field by itself:

- You want to review opportunities for a five-month range: March 1 through July 31, 2014.
- In the Close Date fields, you select 03/1/2014 to 7/31/2014.
- The application clears the Close Period field and retrieves opportunities whose close date falls within the date range.

#### *Related Topics*

## Opportunity Assessments

### Perform an Opportunity Assessment

Opportunity assessments contain a series of questions, responses and comments that help you evaluate the health of an opportunity. After you answer the questions and submit the assessment, you get a rating score.

Such feedback enables you better pursue the opportunity and increase the chance of winning the deal. For example, you complete an assessment intended to determine whether an opportunity is healthy enough to offer the customer a 15 percent discount. Based on the assessment score, you and your manager determine whether the opportunity qualifies for the discount. Giving a discount increases the chance of winning the deal.

## Assessments Available for Sales Stages

Assessments are enabled for a specific opportunity sales stage within the sales method used on the opportunity. Assessments available in one sales stage may not be available in another sales stage.

## Perform an Opportunity Assessment

You must have Full or Edit access on an opportunity to perform new assessments and update existing assessments. With View Only access, you can view assessments but can't update them.

Here's how to perform an opportunity assessment.

1. From the Navigator, click **Opportunities**.
2. In the list of opportunities, select an opportunity to edit it. The Edit Opportunity page appears.
3. Click the **Assessments** tab to open the Assessments page.

Note that if only one assessment is available, it displays in the Assessments page, ready for entry.

If multiple assessments are available, the most recently created (by the administrator) assessment displays. You can use the Show list of values to select other assessments.

You can add assessments, if more are available, by clicking Add Assessment, and then selecting the assessment. The Add Assessment button displays only if multiple assessments are available.

After a salesperson has answered and submitted all the assessment questions, you can't revise the questions. However, you can click on the edit icon to view the entire assessment comments text. You can also add a comment for questions that don't have existing comments to display.

## Update an In-Progress Assessment

Here's how to update an assessment that's in progress.

1. From the Navigator, click **Opportunities**.
2. In the list of opportunities, select an opportunity to edit it. The Edit Opportunity page appears.
3. Click the **Assessments** tab to open the Assessments page.
4. To retrieve the assessment you have in progress, click the **Show** list of values and select the assessment from the list. Note that the assessment that was worked on last is the one that appears by default in the Assessment tab.

## View and Edit Assessment Comments

You can view all assessment responses, including free-form response text and comments. If the question has existing comments, then a two-line read-only Comments text box is displayed. If there's more than two lines' worth of text to display, then the text is truncated and ends with an ellipsis. You can click on the edit icon to view the entire text. You can also add a comment for questions that don't have existing comments to display.

## Delete Assessments

Your administrator may have enabled the Delete Assessment button in the Assessments page. The delete action lets you delete an existing assessment. After you delete an assessment, it's available to rerun using the Add Assessment button. Note that you must have Full or Edit access on the opportunity to delete an assessment.

## Perform Multiple Opportunity Assessments Using the Same Template

From time to time, you might want to reassess your opportunity information and perform several assessments for opportunities using the same assessment template.

To perform multiple assessments per template, your sales administrator must set the profile option **Enable Multiple Assessments Per Assessment Template** to Yes at the site level. You can add assessments, if more are available, by clicking Add Assessment, and then selecting the assessment template. When you add another assessment for your opportunity using the same assessment template, the application automatically generates an assessment name using the assessment template name plus a counter suffix. If you have an existing assessment for an opportunity named Discount Eligibility V1, then if you add another opportunity assessment using the same template, the new assessment name is displayed as Discount Eligibility V2. You can edit this name to suit your own requirements.

When all questions are answered, the status of the assessment is set to Complete and continues to be editable. You can view all ongoing or historical assessments, scores, statuses, and template names. You can use the Delete and Submit features only if the buttons are enabled by your administrator using Page Composer. You can delete an assessment that's no longer required or if it was created by mistake as long as it hasn't been submitted. The Submit button becomes available only when you have entered responses for all questions. You can't edit the assessment once the status is set to Submitted but you can continue to view it.

### Perform Multiple Opportunity Assessments

Before you begin, ensure that your administrator has set the Enable Multiple Assessments Per Assessment Template (MOW\_MULTIPLE\_ASSESSMENTS\_ENABLED) profile option to Yes. You must also have Full or Edit access on an opportunity to perform multiple assessments and update existing assessments using the same assessment template. With View Only access, you can view assessments but not update them.

Here's how to perform multiple opportunity assessments using the same assessment template.

1. From the Navigator, click **Opportunities**.
2. In the list of opportunities, select an opportunity to edit it. The Edit Opportunity page appears.
3. Click the **Assessments** tab to open the Edit Opportunity Assessments page.

If existing assessments are available for the selected opportunity, they're listed here.

4. Click **Add Assessment**. The **Add Assessment** dialog appears.
5. From the **Template** drop-down list, select the assessment template previously chosen for the selected opportunity assessment.
6. Click **Save and Continue**.
7. Select the appropriate responses to all the questions.
8. Click **Submit** and then click **Yes** from the confirmation dialog box.

The assessment status is changed to Submitted.

After you submit an assessment, you can't revise it.



# 17 Opportunity Products and Revenue

## Overview of Opportunity Products and Revenue

You typically add product groups or products to opportunities to record potential sales revenue while working the deal. After an opportunity is won and closed, the revenue from the products sold becomes actual revenue, for reporting purposes.

Companies use opportunity revenue information for several reasons, such as analyzing sales pipelines and win/loss trends, monitoring the performance of salespeople, and generating revenue forecasts. Here are some typical tasks that you can perform with opportunity products and revenue:

- Add products and product groups that the customer is interested in.
- Set product line revenue attributes, such as revenue amount, price, and quantity.
- Set other product line attributes, such as inclusion in the forecast, expected close date, win probability, and competitors.
- Enter and maintain recurring revenue schedules, such as those for subscription services or training plans.
- Allocate and manage sales credit amounts that opportunity team members receive.
- Run the assignment process to assign salespeople to the product lines.

### *Related Topics*

- [Manage Opportunity Products and Revenue](#)
- [Opportunity and Product Line Attributes Synchronization](#)

## Opportunity Products and Revenue Management

### Manage Opportunity Products and Revenue

You can add products or product groups to opportunities and then update the product lines, including revenue attributes, if required.

### Add Products or Product Groups

Here's how to add a product or product group to an opportunity.

1. Sign in to the application as a user with access to opportunities, such as a salesperson or sales manager.
2. Navigate to **Sales > Opportunities**.  
The opportunity landing page displays your opportunities.
3. Find an opportunity and edit it. Or, create an opportunity and save and edit it.
4. In the Products region, click **Add** to add a row to the table.

- In the **Type** field, select **Group** if you're adding a product group. Select **Product** if you're adding a single product.

**Note:** Depending on your implementation, you may have the option to browse the sales catalog. The catalog contains the same product groups and products as those accessible from the table.

- Select the **Name** list, and then select the product group or product.

If the product group or product isn't in the recently used items list, access the search page by clicking the **Search** link in the **Name** list.

- In the Search page, the product groups or products you have access to may be automatically filtered to show only the products in your sales territories.

For type **Product**, you can search for the product you want by entering a keyword, name, or product number. For type **Group**, you can search by name and reference number, if known.

To search all products in the database without the territory filtering, deselect the **Filter by Territory** option.

- Select the product group or product and click **OK** to return to the Products table, where you can set other attributes of the product line, such as quantity, price, and so forth.
- Save your work.

This table explains the product line attributes.

Product Field	Description
Type	Select either product group or product.
Name	Use to select a product or product group. If individual products aren't implemented, then only product groups are available.
Quantity	Enter values in whole numbers. The application multiplies this field by Estimated Price to calculate the revenue amount.
Estimated Price	Enter estimated price per item. The application multiplies this field by Quantity to calculate the revenue amount.
Amount	Amount used in forecasting and for reporting. The application calculated this field from price multiplied by quantity, but you can override the value.
Currency	The initial value is based on the opportunity-level currency. If multiple currencies are implemented, you can pick a different currency.
Sales Credit	Use sales credits to specify who gets revenue and overlay sales credit for the sale.

Depending upon how your application is configured, you may have these additional product line attributes available.

Product Field	Description
Close Date	Indicates the expected close date of the product line. The initial value is the opportunity-level close date, but each line can have its own close date.

Product Field	Description
Forecast	Displays a check mark if the product line matches the established forecast criteria.
UOM (Unit of Measure)	The initial value is based on the product or product group selected.
Status	Use to set the product line status, such as Open or Won.
Win Probability	The initial value is the opportunity-level win probability, but can be overridden.
Best Case	The initial value is the revenue amount for the item or group (providing Revenue is greater than Best Case).
Worst Case	Use to set a worst case revenue amount.
Include in Forecast	The application sets the initial value to <b>When matches forecast</b> , if forecasting criteria have been enabled. Can be overridden to <b>Yes</b> (meaning always include in forecast) or <b>No</b> (meaning never include in forecast), if forecasting criteria override has been enabled.
Territories	Displays the territories assigned to the product lines. You can drill down into the field to view all of the associated territories.
Competitor	You can set a competitor at product-line level. The choice list is limited to those associated at the opportunity level. Depending upon your implementation, you may be required to enter a competitor when setting an opportunity or product line to closed.
Win/Loss Reason	When a product line or the opportunity is closed, this field indicates why the product line was won or lost.
Actual Close Date	This is a read-only field set by the application automatically when you set a product line to a closed status.

For procedures on managing recurring opportunity products or product groups that are part of a subscription business model, see the topic, [Create and Maintain Recurring Opportunity Products](#).

## Remove Product Lines

Here's how to remove any products you don't need from the Products table in opportunities.

1. Sign in to the application as a user with access to opportunities, such as a salesperson or sales manager.
2. Navigate to **Sales > Opportunities**.
3. Find an opportunity and edit it. Or, create an opportunity and save and edit it.
4. In the Products region, click the X icon located at the end of the applicable table row to remove a product line from your opportunity.
5. Save your work.

### Related Topics

- [Overview of Opportunity Products and Revenue](#)
- [Best Practices for Sales Credits](#)
- [Example of Product Line Synchronization with Win Probability](#)

## Can I update products on multiple opportunity lines at the same time?

Yes, if you have the mass update feature enabled at either the opportunity summary or product tab level, then you can update attributes and apply changes to fields at once on multiple opportunity product lines.

Mass update of attributes at the product line level works similar to the mass update of top-level objects such as opportunities and accounts. The main difference is that your opportunity revenue and product line changes are saved at the product line level. Mass update of changes at the opportunity object level are saved at the parent opportunity level.

### Related Topics

- [How to Apply Mass Update to Opportunities](#)
- [How do I enable mass update of records?](#)

## Recurring Opportunity 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](#)

## Create and Maintain Recurring Opportunity Products

You use recurring transactions to enter and track opportunity products or product groups that are part of a subscription business model.



Watch video

You use recurring transactions to enter and track opportunity products or product groups that are part of a subscription business model. Use the procedures in this topic to create and maintain recurring revenue schedules in opportunities.

**Note:** Recurring opportunities functionality is available only if your administrator has enabled it.

### Create a Recurring Revenue Schedule

Here's how to create a recurring revenue schedule for a product or product group in the opportunities UI.

1. Sign in as a sales user, such as a sales representative or sales manager.
2. Navigate to **Sales > Opportunities**.  
The opportunity landing page displays your opportunities.
3. Edit an opportunity by clicking the name in the list. Or, create an opportunity and save and edit it.
4. In the Products table, click the **Add** button and enter the details about the product or product group.
5. In the Schedule column, click the add icon (plus sign). The Set Schedule page appears.  
Enter data into the fields, using the guidance in this table.

Field	Guidance
Frequency	Select a frequency that the revenue should be generated for. Note that:

Field	Guidance
	<ul style="list-style-type: none"> <li>○ Bi-Weekly is twice a month (every two weeks)</li> <li>○ Bi-Monthly is every other month</li> </ul>
Start Date	<ul style="list-style-type: none"> <li>○ The default date is opportunity close date.</li> <li>○ You can update the field to any other value (equal to or later than current date).</li> </ul>
End By	<p>Enter the number of transactions or a calendar end date.</p> <p><b>Note:</b> The number of transactions to include in your recurring revenue schedule for a product or product group should not exceed 500.</p>
Quantity	Enter quantity of the product or product group being sold, as a whole number.
Amount	Enter the amount of the product or product group being sold.

- Click **Next**. The Manage Schedule page appears. Note the following actions:
  - The appropriate number of transactions are created based on frequency, start date, and number of transactions or end date.
  - The close date on each transaction is set to a value derived from the combination of frequency, start date, and end date.
  - Quantity and amount are repeated for each transaction.
  - Other values (like status, win probability, product, currency, and so on) are cascaded from the parent revenue line.
  - Transactions are ordered by ascending close date by default.
  - Total quantity and amount are displayed for the schedule. Total amount shows the applicable currency symbol of the product currency.
- Review the transactions in the schedule and adjust if required.  
You can add a schedule transaction row by clicking the **Add** button and entering the required information.
- Click **OK** to save the schedule. The application returns to the edit opportunity page.
- Click **Save** or **Save and Close** to save the changes.

## Manage Scheduled Transactions

All other actions you can perform with an existing recurring schedule are done in the Manage Schedule page, available by editing the schedule.

You can:

- Edit the existing transactions in the schedule.
- Extend the schedule by entering new dates.
- Replace the schedule altogether.

- Delete the schedule.

Here's how to manage existing scheduled transactions.

1. Sign in as a sales end user, such as a sales representative or sales manager.
2. Navigate to **Sales > Opportunities**.

The opportunity landing page displays your opportunities.

3. Edit an opportunity by clicking the name in the list.
4. In the Products table, click the edit icon in the Schedule column. The Manage Schedule page appears.
5. In the Manage Schedule page, perform, if required, the actions in this table.

Action	Details
Edit schedule transactions	<ul style="list-style-type: none"> <li>○ To add a row to the transactions table, click the <b>Add</b> button and enter the required information.</li> <li>○ To remove a row in the transactions table, click the <b>X</b> in the row.</li> </ul>
Replace a schedule	<ul style="list-style-type: none"> <li>○ Click the <b>Replace Schedule</b> button.</li> <li>○ The Replace Schedule page behaves as if you're creating a new schedule.</li> <li>○ Enter the new schedule details and save. The new schedule replaces the old schedule.</li> </ul>
Extend a schedule	<ul style="list-style-type: none"> <li>○ Click the <b>Extend Schedule</b> button to retrieve the Extend Schedule page.</li> <li>○ Edit the schedule details as needed.</li> <li>○ Note the following actions:                             <ul style="list-style-type: none"> <li>- If the previous schedule had the number of occurrences stored, then that value is set as the default.</li> <li>- The recurring quantity and recurring amount are set by default, based on previous values. If you update these to any other values, the resulting transactions are generated based on the updated values.</li> <li>- If the start date of the new schedule is prior to the end of current schedule, then the process replaces all existing transactions with a close date later than the new schedule's start date.</li> </ul> </li> </ul>
Delete a schedule	<ul style="list-style-type: none"> <li>○ Click the <b>Delete Schedule</b> button.</li> <li>○ Respond with Yes to the warning message.</li> <li>○ All underlying scheduled transactions are deleted, and the schedule parameters on the parent line are removed.</li> <li>○ The product line is converted to a standard revenue line and the quantity and amount field are set to blank.</li> </ul>

6. Click **Save** or **Save and Close** in the edit opportunity page to commit the changes made in the recurring schedules page

*Related Topics*

- [Overview of Recurring Opportunity Products](#)
- [Manage Opportunity Products and Revenue](#)

# 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.</p> <p>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();</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',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();  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

- [Allocate Sales Credits](#)
- [How can I lock in a sales credit recipient?](#)
- [Sales Credit Recipient and Forecast Territory Predefined Logic](#)
- [Set Deal Protection on Opportunities](#)

## Allocate Sales Credits

Sales credit recipients and revenue amounts roll up the resource hierarchy for pipeline reporting and quota attainment. Your company can use sales credits to report on salesperson performance and quota attainment, to aid in compensation calculation, and to facilitate forecasting by territories.

When a product line is first added to an opportunity, the user who added it, is automatically set as the sole revenue sales credit recipient (receiving 100 percent of the sales credit). For each product line, you can assign a portion or all of the sales credit from the product revenue to individual salespeople.

**Note:** You must have Full access to an opportunity to assign sales credits.

## Allocate Revenue Sales Credit

You typically allocate revenue sales credit to salespeople working the deal.

Here's how to allocate revenue sales credit to a user.

1. Sign in as a salesperson or sales manager and navigate to **Sales > Opportunities**.

The opportunity landing page displays the list of your opportunities.

2. Find an opportunity and edit it. Or, create, save, and edit an opportunity and then add a product line to it.
3. In the Edit Opportunity page Products table, click the edit icon in the **Sales Credit** column for the line you're editing. The Edit Sales Credit window appears.
4. Click the **Add Revenue Credit** button to add another row to the sales credits table.
5. Select the drop-down list in the **Name** column for the new row. Select a name from the recently used list, or click **Search** to search for the salesperson.
  - a. If searching, in the Select: Owner page, enter the search criteria for the user you want to allocate sales credit.
  - b. In the search results, select the user and click OK.
6. In the table, enter the percent of sales credit for the user or an amount. With revenue sales credit, the total of all percentages entered must add up to 100 percent.
7. Optionally, in the **Forecast Territory** column, pick a territory to forecast the revenue in. The Forecast Territory can be set to any territory assigned to the product line with Revenue or Revenue and Nonrevenue Forecast Participation. The forecast territory is set automatically when the assignment process runs, so you can skip this step if you want.
8. When you're finished setting the sales credit, click OK.
9. In the Edit Opportunity page, save your changes.

## Allocate Overlay Sales Credit

You typically allocate overlay sales credit, or nonrevenue credit, to other resources helping out with the deal, such as a product or market specialist.

Here's how to allocate overlay sales credit to a user.

1. Sign in as a salesperson and navigate to **Sales > Opportunities**.

The opportunity landing page displays the list of your opportunities.

2. Find an opportunity and edit it. Or, create, save, and edit an opportunity and then add a product line to it.
3. In the Edit Opportunity page Products table, click the edit icon in the **Sales Credit** column for the line you're editing.

The Edit Sales Credit window appears.
4. Decide which type of overlay credit you want to enter and then select that type from the **Allocation Style** list of values:
  - o **Proportional to Revenue:** With this type, the sales credit amounts adjust automatically and proportionally when the revenue item amount changes.
  - o **Ad Hoc Amounts:** With this type, the sales credit amounts don't change with revenue item amount changes.
5. Click the **Add Overlay Credit** button to add another row to the sales credits table.
6. Select the drop-down list in the **Name** column for the new row. Select a name from the recently used list, or click **Search** to search for the salesperson.

- a. If searching, in the Select: Owner page, enter the search criteria for the user you want to allocate sales credit.
  - b. In the search results, select the user and click **OK**.
7. In the Edit Sales Credit window, in the **Sales Credit** column of the table, enter the percent of sales credit for the user. With overlay sales credit, the total of all percentages doesn't have to add up to 100 percent.
8. Optionally, in the Forecast Territory column, pick a territory to forecast the revenue in. The Forecast Territory can be set to any territory assigned to the product line with Revenue or Revenue and Nonrevenue Forecast Participation. The forecast territory is set automatically when the assignment process runs, so you can skip this step if you want to.
9. When you're finished setting the sales credit, click **OK**.
10. In the Edit Opportunity page, save your changes.

#### Related Topics

- [Best Practices for Sales Credits](#)
- [How can I lock in a sales credit recipient?](#)
- [What's deal protection?](#)

## How can I lock in a sales credit recipient?

When assigning sales credits, you can lock the sales credit recipients of a revenue line by setting the corresponding Lock Credit Owner check box on the line. This setting prevents the recipient from automatic replacement when assignment is run.

Generally, you don't need to lock resources who are members of a forecast territory on the sales credit. However, you should consider locking ad hoc resources or non-territory-based recipients, such as partner resources, to prevent automatic assignment from removing them as credit recipients.

#### Related Topics

- [Best Practices for Sales Credits](#)
- [Allocate Sales Credits](#)
- [Sales Credit Recipient and Forecast Territory Predefined Logic](#)

## Product Attribute Synchronization

### Example of Product Line Synchronization with Win Probability

When you change the win probably percentage on an opportunity, the application automatically resynchronizes any product lines whose win probability percentages were previously in sync with the opportunity win probability.

## Scenario

This example illustrates what happens when you change the opportunity win probability:

- Opportunity win probability is 50%.
- Product line 1 win probability is 50%.
- Product line 2 win probability is 50%.
- Product line 3 win probability is 40% .

You change the opportunity win probability to 60%. The application automatically changes the win probability for product lines 1 and 2 to 60% as well, because they were previously in sync with the opportunity-level win probability.

The win probability for product line 3 doesn't change, because it wasn't previously in sync with the opportunity-level win probability.

### *Related Topics*

- [Overview of Opportunity Products and Revenue](#)
- [What happens if I change win probability?](#)
- [Manage Opportunity Products and 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*

- [Example of Product Line Synchronization with Win Probability](#)
- [Set Opportunity Revenue Forecast Criteria](#)





# 18 Forecasts

## 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>
Adjust forecasts	<p>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.</p>
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>

What You Can Do	Details
	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.
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.

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

As a sales manager, you can add forecast items to a forecast by navigating to Forecasts and click **Review** or **Edit**.



Search for opportunity items on the Unforecasted Pipeline tab and add them to the forecast. For any forecast item with a warning icon, you must change any attributes that don't meet the forecast criteria. When all attributes fall within the forecast criteria, the product item becomes part of your forecast.

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

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

If you don't see the Unforecasted Pipeline tab, then click the **Add Forecast Items** button to search for and select opportunity items to add.

## About Forecasting by Territory, Product, or Unit

You can forecast sales by territory and amount, by product and amount, or by product and quantity of units.

A forecast covers a specified time period, such as quarter or month. A territory owner submits the current forecast to the owner of the parent territory, who's likely the owner's manager.

The application generates the forecast by capturing information from opportunity lines as follows:

- Opportunity items are placed in time periods according to the planned or actual close date.
- Only opportunities that meet the forecast criteria are included in a forecast.
- Opportunities assigned to a territory are added to the forecast for that territory.
- Opportunity lines with the Renew revenue type category are added to Renewal forecasts. Subscriptions are an example.

## Forecast Amounts by Territory

The territory owner forecasts the amount of sales for the territory by time period. The sum of the amounts for all included opportunity items is the forecast amount. Use the Edit Forecast page Territories tab and Forecast Items tab to forecast amounts by territory.

You can:

- Manually add opportunity items to your forecasts or remove them.
- Change the amounts for individual forecast items.
- Make adjustments by changing the total forecast amount for individual time periods for a subordinate's territory forecast.
- Make adjustments to the amounts for a subordinate's forecast items.

## Forecast Amounts by Product

Within the territory, the territory owner forecasts the amount of sales for each product by time period. The forecast amount for each product is the sum of the amounts from opportunity items for that product. Use the Edit Forecast page Products tab and Forecast Items tab to forecast amounts by product.

You can:

- Manually add opportunity items to your forecasts or remove them.
- Change the amounts for individual forecast items.
- Make adjustments to the individual product amounts by category (if renewal forecasting is enabled) and by time period.
- Make adjustments to the amounts for a subordinate's forecast items.
- Make adjustments to the product amounts for a subordinate's territory forecast.

## Forecast Unit Quantities by Product

Within the territory, the territory owner forecasts the quantities of each product by time period. The forecast quantity for each product is the sum of the quantities from opportunity items for that product. Use the Edit Forecast page Products tab and Forecast Items tab to forecast unit quantities by product. In the Products tab, select to show Quantity or All Totals.

You can then, for your territory:

- Manually add opportunity items to your forecasts or remove them.
- Change the quantities for individual forecast items.
- Make adjustments to the individual product quantities by time period.

- Make adjustments to the quantities for a subordinate's forecast items.

## Manage Your Forecast

Sales managers review and adjust the forecasts of their sales teams. You can add or remove items from your or a subordinate's forecast.



When you make adjustments, you can adjust quantities and amounts directly for an opportunity item. You can also make adjustments for a territory and add amounts that don't come from existing opportunities.

## Review Your Forecast

To review your forecast:

1. During an open forecast time period, navigate to **Sales > Forecasts**.
2. Review the graph to compare your group's forecast with won revenue and the pipeline.
3. The second chart shows your group's percentage of quota attained. Roll over the target quota amount to review quota and won revenue amounts.
4. Click the breadcrumbs to switch to your next forecast for review and back to your current forecast.
5. Click **Review** to see the details of your forecast.
6. Click **Edit** to make your changes.

Any subordinate forecasts that weren't submitted by their owners will now be submitted for them

## Edit the Forecast

The Territories tab shows your team's forecasts, won revenues, open pipelines, and quotas. To edit your forecast:

1. Roll over the icons in the first column to see which territory owners submitted their forecasts.
2. Hover over the Forecast Change arrow to see what's changed since you last submitted your forecast.
3. Click the **Products** tab.
4. Click **Show** and choose **All Totals**.
5. You can view and change the totals for current, best case, and worst case forecasts as well as the quantity for each product.

## Adjust Opportunity Items in the Forecast

You can adjust the forecast for accuracy in two ways. Edit the totals by product or adjust the opportunities that sum to the totals. To adjust your forecast:

1. Click the **Forecast Items** tab.  
The tab lists the opportunity items currently in your forecast. The items meet the forecast criteria.
2. In the **Show** list, select one subordinate's territory.
3. Select the opportunity item you want to change, and enter new values for quantity or forecast, or both.
4. Click the icon to remove an opportunity item.

5. Click **Add Forecast Items** to find and add a missing opportunity item.
6. Click **Save**.

The opportunity items you edited show the new values, and the forecast totals are recalculated.

7. Hover over a blue dot next to one of your changed opportunity items.

You see the adjustment you made, as well as the un-adjusted forecast submitted to you by the salesperson. The salesperson can't see any of the changes you made.

## Adjust and Submit the Forecast

You can adjust the forecast by product and submit the forecast to your manager. To complete your forecast:

1. Click the **Products** tab.

You can see the changes you made to the opportunities reflected in the respective product totals.

2. Deselect **Exclude All Rows with All Zero Values**.

You can now see and adjust all products.

3. Make your changes to quantities and forecast amounts to any products, including those with zero values.

4. **Save** your forecast.

5. **Submit** your forecast to your manager.

You can make no further changes after submitting your forecast.

## Sales Forecast Adjustments

Changes you make to the original forecast up or down are adjustments. If your forecast is by product, then you can adjust quantities as well as the amounts for individual forecast items.

Depending on your configuration, you can adjust the following:

- The amounts for individual forecast items
- The total amounts for each territory owned by your subordinates and by time
- The total amounts by product and also by time period for your territory
- The quantities for individual forecast items
- The total quantities by product and also by time period for your territory
- Adjustments for subscription renewals only and for new forecast items that aren't renewals.

## Remove Adjustments

To remove all of your adjustments, go to the Actions menu and select Remove My Adjustments.

## Copy Forecasts

If you copy the prior forecast, then your copy takes the total forecast numbers from the previous forecast, including adjustments, and pastes them into your current forecast. These numbers overwrite any calculated totals from rolled up opportunity or adjustment data.

## Adjusted Best Case and Worst Case Forecasts

The adjusted best case forecast is the sum of:

- The best case for all forecasted items
- Item-level adjustments for the best case
- Any summary level adjustment to best case

The adjusted worst case forecast is the sum of:

- The worst case values for all forecasted items
- Item-level adjustments for worst case
- Any summary level adjustment to worst case

## Forecast Adjustment Notes

If enabled, you can add a note to each forecast item you adjust and add one consolidated note for all summary adjustments. Each note includes who created the note and when you created it. You can edit the notes that you created. Managers and senior management can view notes within their territory hierarchy. You can create notes for the following:

- Forecast Items

A sales manager can add a note to each item included in subordinates' forecasts provided the item is not in won status. Use the Note column in the Items tab to add, edit, or delete an adjustment note for an item. A VP sees item adjustment notes added by subordinates. When the VP drills down into the manager territory forecast, he can add notes to items.

- Territory Summary

This is a single consolidated note for all the territory summary adjustments that the user can make in the territories tab. A VP sees summary adjustment notes added by subordinates in the territory row of the Territories tab. When the VP drills into the manager territory forecast, he sees the summary adjustment note added by the subordinate in the Territories tab.

- Product Summary

This is a single consolidated note for the product summary adjustment you create in the products tab. A VP sees summary adjustment notes added by subordinates in the territory row of the Territories tab. When the VP drills into the manager territory forecast, she sees the summary adjustment note added by the subordinate in the Products tab.

## Copy 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.

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.

## Forecast Actions and Results

The actions you take with your forecast produce different results depending on the timing and the actions of others. Most forecast actions take place during the submission window. After the end of the submission window, everyone's current forecast is frozen regardless of submission status.

Action	Result
Make changes to opportunities Add or remove forecast items	The forecast is updated to reflect changes.
Submit your forecast	The forecast is frozen. You can't make changes.
Withdraw your forecast after submission, but before your manager submits or adjusts his forecast	You can again make changes to the forecast and resubmit. Forecast numbers update from the pipeline.

If you have subordinates, then you can also do these actions.

Action	Result
Adjust numbers for forecast items Adjust totals, including copy previous forecast totals to the current forecast	<p>If previously unsubmitted, all subordinates' forecasts are submitted and frozen when you edit your forecast. The subordinate's forecast is frozen and can't be changed by the subordinate. All direct and indirect subordinates can't make changes unless you remove your adjustments and reject each subordinate's forecast.</p> <p>Forecast numbers no longer update from the pipeline. The adjustment becomes the current forecast and ignores the rollup values from current forecast items.</p>
Edit a subordinate's unsubmitted or rejected forecast	You can act as your subordinate, so all edits and adjustments can be seen by your subordinate. You can adjust the forecast only if your subordinate can adjust his own forecast.
Submit a subordinate's unsubmitted forecast	<p>Your subordinate's forecast is frozen and can't be changed by her. All direct and indirect subordinates can't make changes to the forecast unless you remove your adjustments and reject each subordinate's forecast.</p> <p>Forecast numbers no longer update from the pipeline.</p>
Remove your adjustments	Adjustments are removed. Opportunity changes are ignored for as long as your subordinate's forecast remains submitted.
Reject a subordinate's forecast	<p>The application will clear all your adjustments of your subordinate's forecast.</p> <p>Your subordinate can again make changes to the forecast and resubmit. If the subordinate is a sales representative, then the forecast numbers update again from the pipeline.</p>

## 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.
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.

## FAQs for Forecasts

### Frequently Asked Questions (FAQs) for Forecasts

This section contains some frequently asked questions (FAQs) for forecasts. Scroll or search to find answers to common questions.



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

You can click the item in the Forecast Items tab to open the opportunity and make changes.

For any product item with a warning icon, you must change any attributes so that the product item doesn't meet the forecast criteria or so that the forecast item no longer closes within the forecasting period.

A sales manager can drop the item by selecting Remove from the Action menu for the item in the Forecast Items tab. To see your deleted items, choose Dropped Forecast Items from the Show list. You can then add any dropped items back to your forecast by clicking the Add icon for the item.

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

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

## When does my forecast appear in my currency?

Your forecast appears in your preferred currency. You can select a different currency from the Currency list.

Your selected currency also applies to your view of subordinate forecasts. However, the currency selection doesn't apply to any graphs or reports that were added to the forecasting screens.

## When do I submit my forecast?

You can make changes to your forecast and submit it during the submission window. You can submit your child territory forecasts on behalf of your subordinates and then make adjustments to your forecast before submitting.

### *Related Topics*

- [What happens if I submit my forecast?](#)

## What happens if I submit my forecast?

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

## 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.

# 19 Territories

## Overview of Territories

Your territories contain rules for automatically assigning salespeople and other resources to accounts, contacts, households, partners, leads, and opportunity items.

### Salesperson

As a salesperson viewing an account, partner, lead, or opportunity, you can see the assigned territories when you view the sales team information. You also forecast your sales by territory. Sales quotas can be assigned to you by territory.

### Sales Managers

As a sales manager, you can modify the territories in the hierarchies below your assigned territories. Your sales administrator must create the top territory first. If you see no Parent field and no existing territories, then the top territory doesn't exist. Here are examples of changes you can make to territories:

- Add a new child territory.
- Change the owner of an existing territory.
- Add team members to a territory.
- Remove an existing territory.
- Add specific accounts, contacts, and households to the coverage of a territory.
- Exclude specific accounts, contacts, and households from the coverage of a territory.
- Define or change the definition of a territory coverage.

You can change an active territory directly without using a territory proposal. You can:

- View a list of territories.
- Look at the details for a territory.
- Use the Summary tab to change attributes of the territory.
- Use the Dimensions tab to modify the boundaries of the territory.
- Use the Inclusions tab to add specific accounts, contacts, and households to the territory.
- Use the Exclusions tab to exclude specific accounts, contacts, and households from the territory.
- Use the Team Members tab to change team members or the territory owner.
- Use the Child Territories tab to navigate the territory hierarchy and to add a new child territory.
- Edit territories directly while editing an account. The territory name on the Team tab in the Edit Account page opens the Edit Territory UI.O

# Modify Your Territories

This example describes each tab in the Territories work area and the typical tasks you perform as a sales manager. You're in the Less Details work area where your changes become active right away and you don't use territory proposals.



Let's explore the following tabs in the work area:

- Summary tab
- Dimensions tab
- Team Members tab
- Child Territories tab

## View the Summary and Dimension Tabs

1. Click **Navigator > Territories**.
2. If Click to Edit is enabled, you can click a row to highlight it and some or all fields become active for editing, depending on your access to the selected territory. You can save changes you make in the list and they become active, or discard them.
3. In the list of your team's territories, click the **Central - Products - Div I** territory name.  
The Summary tab displays commonly used territory attributes. You can use Application Composer to add other attributes to this tab.
4. Click the **Actions** menu.  
From this menu you can delete this territory including all of its children. You can also delete this territory coverage including dimensions and values, or add coverage if it has none.
5. Click the **Dimensions** tab.  
The Dimensions tab displays the defined boundaries of the territory. Objects that matches these attributes will be assigned to this territory.
6. Click **Edit**.  
You can make changes to or remove the Address coverage.
7. In the Edit menu, click **Edit Dimensions and Coverage**.  
The coverage dimensions include a set of attributes and their corresponding values. You can add or change the values.
8. Select the **Industry** dimension.
9. To add an industry to the coverage, select it in the Available region and use the arrow to move it to the Selected region.
10. Select the **Geography** dimension.  
Geography is available only if you aren't using the Address dimension.
11. Click **Add Members in Bulk** to enter values for the dimension, separated by commas..
12. Enter values separated by commas, or a range of values. Enter a range of postal codes, **85001-85030**.  
You can use a range of values only for the Geography or Address dimensions.

13. Choose to add the values you select to the existing values for geography and click **OK**.
14. Click **Cancel** until you return to the Edit Coverage Dimensions page.
15. Click the list arrow next to the Edit button and note the **Remove All** selection will remove all coverage for this territory.

You can add individual customers to this territory in the Inclusions tab. If the Exclusions tab is enabled, you can select customers to be excluded from the territory, even if the customers match the dimensions for the territory.

## View the Team Members Tab

1. Click the **Team Members** tab.  
This tab displays the territory team members. You can add or remove team members and change the territory owner.
2. The Owner column contains a check mark to indicate Peter Branch is the owner of this territory. Click his name.  
The Resource Details dialog shows information about Peter Branch. You can send an e-mail to Peter by clicking the e-mail address on this dialog or in the Team Members page.
3. In the **Function** field for Peter, change his function to **Salesperson**. This is the function Peter has in this territory team.

## View the Territory Hierarchy

1. Click the **Summary** tab.
2. Click the name of the parent territory to open the Edit Territory page for the parent.
3. Click the **Child Territories** tab to see all child territories of the open territory.
4. Click the **Central - Products - Div I** territory.
5. Click the **Child Territories** tab.
6. Click **Create Territory**.

Notice that the parent territory is Central - Products - Div I.

7. Click **Cancel**.

When you click Save, or Save and Close, your changes immediately become the active definition for this territory.

## 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

- [Get Started with Search in Workspace and Work Areas](#)
- [How do I use dynamic and nested dynamic tabs?](#)
- [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](#)

## Create a Territory Proposal

You can update active territories directly, or use a territory proposal as a sandbox where you make your proposed changes to your territory hierarchy before activating the changes.

**Tip:** Use proposals for territory realignments or changes to be activated at a future date.

1. Click **Navigator > Territories**.
2. Click the **Sales Territories Hierarchy** tab.
3. In the Active Territories page, click the **Manage Proposals** button.
4. In the Current Territory Proposals region, click **Create**.

5. In the Create Territory Proposal window, enter a name for your proposal.
6. You can enter an **Activation Date** or accept the default which is immediate activation.
7. Click **Save and View**.

Your territory proposal opens and displays your current territory hierarchy. You can start making your changes.

## Add Child Territories to Your Territory Hierarchy

You can add child territories to your own territory or to another territory in your hierarchy. The child territory copies the parent territory information such as territory type, dimensions, and account inclusions. You then make changes as needed.

### Change Active Territories

You can make immediate changes to your active territories. If you see no territories and no parent territory field, then your sales administrator must first create the top territory for the hierarchy.

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.
  - a. Click **Add Customers** and select **Accounts** from the list.
  - b. Search for and select customers you want included.
  - c. Select **Include Hierarchy** to also include the hierarchy of each customer you added.
11. Use the Exclusions tab to select customers to be excluded from the territory. (Use Application Composer to enable the Exclusions tab.)
12. Use the Team Members tab add and remove team members and designate the territory owner.
13. When you complete making all changes, click **Save and Close**.

Your new territory is now active.

## Use Territory Proposals

Add territories using a territory proposal you created.

1. In the Manage Territory Proposals page, select the name of your proposal.
2. In the Edit Territory Proposal page, select the parent territory.
3. From the Actions menu, select **Create and Update > Create Child**.
4. Enter the territory name.
5. Select the owner for the territory.
6. 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 with included accounts.
7. Click **Save and Close**.
8. Click **Edit Coverage**.
9. The coverage for the child territory is the same as the parent's coverage. Select the members for each dimension that you want to change.
10. Click **Save and Close**.

## How can I move a territory in the hierarchy?

When you edit an active territory, you can change the parent territory on the Summary tab. Click the X to delete the current parent and use the choice list or the search to select a new parent territory.

In a proposal, select the territory you want to move. In the Actions menu, select **Create and Update > Move**. Select the new parent on the Move Territory page and click Save and Close. The territory appears in the new position in your proposal hierarchy.

## Change Territory Coverage in a Proposal

A new child territory has the same coverage as the parent. Change dimension selections and included or excluded accounts, contacts, and households to refine the coverage. Your changes aren't active until you activate the proposal.

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. If the territory isn't already added to the proposal, then click **Add to Proposal**.
4. Click **Edit Coverage**.
5. In the Edit Coverage window, do this for every dimension you want to change:
  - a. Select the dimension from the **Dimensions** list. (For the Address dimension, enter values in the correct address column.)
  - b. Add or remove dimension members from the Selected Dimension Members box.
  - c. Optionally, click **Add Members in Bulk** and enter several members or ranges of members separated by commas and click **OK**.
  - d. Click **Save and Close**.
6. In the Included Customers region, select and add specific accounts, contacts, and households to include in the territory.



7. In the Excluded Customers region, select and add specific accounts, contacts, and households to exclude from the territory.
8. Click **Done**.

## 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.

## How Dimensions Define Territories

Dimensions define territory boundaries. A territory captures business objects, such as customers, that fall within the defined boundaries of the territory. If your territory boundary covers Spain, then an account in Spain is your customer.

### Dimensions to Assign Customers or Partners

You can define a territory either for partners or for customers, but not for both. You select either Customer or Partner for the coverage model. When creating a territory, you can include individual customers or partners by selecting them for the territory coverage. Dimensions to define customer or partner territories are:

- Geography or Address, but not both
- Account type

The account type designates the customer designated as a named account or not named. This dimension is only available for customer territories.

- Customer size
- Industry
- Organization type

Your administrator can also use classification categories to define up to three additional dimensions.

## Dimensions to Assign Leads and Opportunities

Your territory is assigned to leads and opportunities using the attributes of the customer or partner on the transaction. These additional dimensions can match attributes of the lead or opportunity to assign your territory:

- Business unit
- Product

Groups of products form a hierarchy in the sales catalog.

- Sales channel

The available sales channels are Direct, Indirect, and Partner.

For example, your company is launching a new product line in all countries. One sales manager with a small sales team specializes in selling only the new product line. You define the sales manager's territory only by the new product line and define geography as Any.

### *Related Topics*

- [Territory Coverage](#)

# 20 Quotes

## Overview of Using Quotes

Create quotes and orders from an opportunity as part of a deal or directly from an account using the automated opportunity-to-quote-to-order process.

The quotes and orders feature lets you:

- Create professional proposal documents.
- Share quotes and collaborate with customers to close deals.
- View quote summary information and drill down into quotes to view details.
- Create product configurations in the integrated quoting application.
- Perform automated pricing calculations.
- Specify pricing and discounts.
- Streamline approval processes.

## Create Quotes

While working on an opportunity or account, you can create, update, duplicate, and version quotes. You can add and remove products and change pricing. When you're satisfied with a quote, you can save it and then mark that quote as active. When you create, edit, or version a quote, you navigate to the integrated quoting application, Oracle Configure, Price and Quote (Oracle CPQ). The application carries the opportunity ID and account ID into Oracle CPQ, and when you save the quote, Oracle CPQ creates the new quote. When you return to the sales application, the newly created quote displays there, associated with the opportunity or account it relates to.

## Access Quotes

In the Sales work area, you access quotes by:

- Searching for quotes using the global search.
- Navigating to the Quotes and Orders landing page within the Sales work area. (Note: The Quotes and Orders page displays only opportunity-related quotes.)
- Viewing and updating quotes from within an opportunity or an account.

For the quotes you have access to, the details include quote number, quote amount, status, and proposal document.

You can find quotes on these UIs in CX Sales:

- In an opportunity, on the Quotes and Orders tab that displays only opportunity-based quotes.
- In an account, on the Quotes and Orders tab that displays only account-based quotes.
- At the top level on the Quotes and Orders page, that displays only opportunity-based quotes.

## Synchronized Opportunity Products and Status

The application automatically synchronizes opportunity products and associated revenue in the quote lines. Marking a quote as active enables the automatic synchronization of the quote lines with the opportunity revenue lines that were the source of that quote.

### Related Topics

- [Create and Update a Quote for an Opportunity](#)

## Get Started with Quotes and Orders

Create quotes from an opportunity as part of a deal or directly from an account. From the Quotes and Orders landing page, get summary information like opportunity, account, and amount.



[Watch video](#)

Get quick access to the quotes you need using the global search. For example, search on number, order total, status, and so on. Or, create your own personal lists. Let's say you want to list all quotes where an order has been submitted or quotes with amounts greater than \$1 million. You simply enter the criteria in the search, and then save the search to access over and over.

From the landing page, drill into quote details. Modify quotes in real-time in the quoting application, Oracle CPQ. For example, in your servers quote, update the quantity, and the application immediately updates the relevant sales figures. In the quoting application, update the opportunity to sync your changes back to the sales application and then return to the sales application for further work.

To see your quotes in opportunities, from the Opportunities landing page, click on an opportunity and then click the Quotes and Orders tab. From here, create new quotes and new versions, edit quotes, or duplicate quotes.

## Create and Update a Quote for an Opportunity

You can create, view, and share quote information from the opportunities UI through integration with Oracle CPQ.

With opportunity quotes, you can:

- Create professional proposal documents that include current product and pricing information within an existing opportunity.
- Create multiple quotes and orders for an opportunity, including multiple versions for the same quote.

**Note:** Only one quote can be active for an opportunity.

When you create or update a quote or sales order in the Oracle CPQ quoting application, the associated opportunity, if active, must be updated in your sales application with the same changes. Updates include additions, deletions, and updates to product (revenue) lines on the opportunity.

Other updates, such as issuing the quote to a customer and submitting it as a sales order, are performed only within Oracle CPQ.

## Create a Quote from an Opportunity

When you create a quote from an opportunity in your sales application, Oracle CPQ automatically starts. The opportunity ID and account ID are copied to Oracle CPQ, and when you save the quote, Oracle CPQ creates the new quote. When you return to the sales application, the newly created quote is available for you and is associated with the opportunity or account it relates to.

Here's how to create a quote from an opportunity:

1. From the springboard or Navigator, click **Sales > Quotes and Orders**.
2. From the Quotes and Orders landing page, edit an opportunity.
3. From the Edit Opportunity page, click the **Quotes and Orders** tab.
4. Click **Create Quote**, and the application automatically signs you in to Oracle CPQ.
5. In Oracle CPQ, start creating the quote by clicking **Add Line Item**.
6. Enter the remaining quote information.

See the online help for Oracle CPQ for information about adding line items to your quote.

7. When done, click the **Update Opportunity** tab to synchronize your changes back to your sales application.

**Note:** You can create an order only from a Quote and not from an opportunity or account.

8. Return to your sales application.

## Update Opportunity Products and Status

You can automatically synchronize opportunity products and associated revenue with quote lines. If you're satisfied with a quote, save it, and then mark that quote as active. Setting a quote as active enables the synchronization of the quote line items with the opportunity revenue lines.

Here's how to update a quote from an opportunity:

1. From the springboard or Navigator, click **Sales > Quotes and Orders**.
2. From the Quotes and Orders List page, select an opportunity.
3. From the Edit Opportunity page, click the **Quotes and Orders** tab.
4. Locate the quote you want and click **Edit** from the Actions menu. You're signed in to Oracle CPQ.
5. In Oracle CPQ, update the quote.
6. Click the **Update Opportunity** tab to synchronize your changes back to your sales application.
7. Return to your sales application.

For more information about using Oracle CPQ, see the Oracle CPQ online help.

### Related Topics

- [Overview of Opportunities](#)

## Make a Copy from an Opportunity Quote

When you sell similar products to different customers, you can make a copy of an existing opportunity quote and reuse the quote lines and other details for another opportunity.

Making a copy saves a lot of time than creating one from scratch.

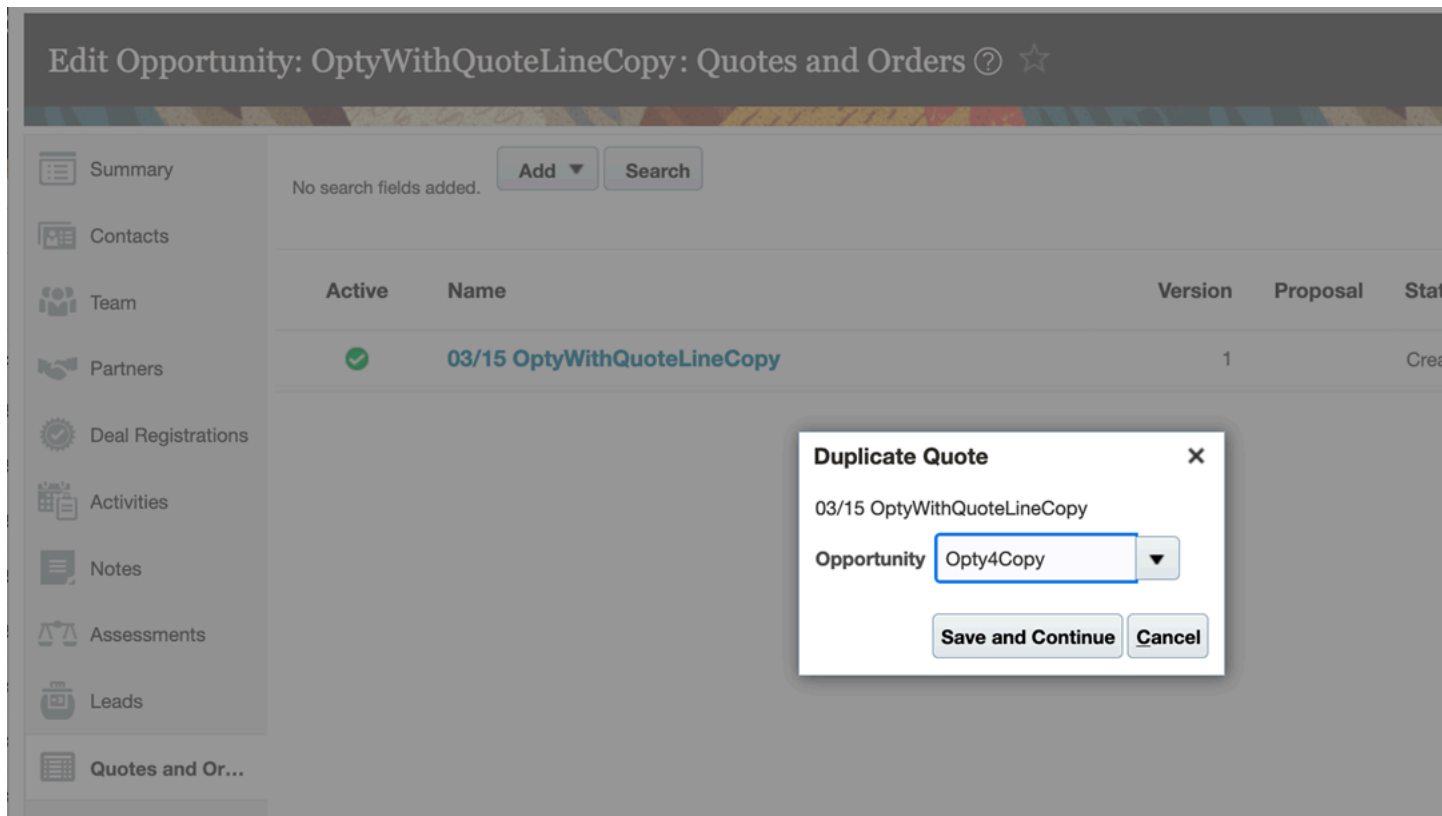
**Note:** You can make copies from opportunity quotes only. Opportunity quotes are the quotes created from an opportunity.

Here's how you make a copy from a quote:

1. Go to the **Quotes and Orders** sub-tab of the Opportunity or the Account details page.

**Note:** From the Account details page, you can create a copy only if the quote is associated with an opportunity. You can't copy quotes that are created from accounts without an opportunity associated.

2. Click the Actions icon for the quote you want to copy and select **Duplicate**.
3. On the Duplicate Quote window, select the **Opportunity**.



4. Click **Save and Continue**.

The sales application opens the copied quote in Oracle CPQ.

5. Rename the quote, review the quote lines, update the contact, and make other changes.
6. In Oracle CPQ, click **Save** and then click **Update Sales**.

When you close Oracle CPQ, the changes reflect in the sales application. You'll find the quote in the Quotes and Orders sub-tab of the opportunity to which you copied the quote.

7. Click **Save and Close**.

#### Related Topics

- [Enable Salespeople to Create a Copy from an Opportunity Quote](#)

## Create and Update a Quote for an Account

While working on an account, you can create, update, duplicate, and version associated quotes to reflect the product and pricing configuration.

Here's how to create a quote from an account:

1. From the springboard or Navigator, click **Sales > Accounts > Quotes and Orders**.
2. From the Quotes and Orders landing page, select an account.
3. In the Edit Accounts page, click the **Quotes and Orders** tab.
4. Click **Create Quote**, and the application automatically signs you into Oracle CPQ.
5. Click **Add Line Item** and start creating the quote
6. Enter the remaining quote information.
7. When done, click the **Update Account** tab to synchronize the changes.

**Note:** You can create an order only from a quote and not from an opportunity or account.

8. Return to your sales application.

For more information about using Oracle CPQ, see the Oracle CPQ online help.

#### Related Topics

- [Overview of Accounts, Contacts, and Households](#)

## Make Quotes Active without Navigating to Oracle CPQ

You can set an inactive quote to active without navigating to Oracle CPQ. Here's how:

1. In your sales application, edit an opportunity or an account.
2. Go to the **Quotes and Orders** tab.
3. In the Active column, click the tick icon against the quote you want to make active. It changes to a green tick, indicating that your quote is active.
  - o Immediately, the sales application runs a revenue reconciliation process that reconciles your revenue lines from Oracle CPQ quote lines. The scope of the reconciliation process is based on the reconcile option (Root or Part) that your administrator has set.

- Your opportunity is locked until the revenue reconciliation process ends. This means you can't make any changes to the opportunity during this time. Once the process ends, the opportunity lock is released.
4. Click the quote name to see your new revenue lines and price type.

**Note:** If the process is interrupted, your quote is set to its previous state. Click Active again after some time to restart the reconciliation.

## Active and Inactive Quotes

If an opportunity has a single quote, that quote is considered active and you can't inactivate it.

If an opportunity has multiple quotes, only one of the quotes can be active at a time. So, when you make a quote active, the previously active quote becomes inactive. However, the information related to inactivated quote -- such as credit split, revenue schedules, and custom attribute information -- remains as is. When you set this inactive quote to active again, all of its information comes back.

## Search Quotes and Quote Lines in Workspace

You can search quote header information and quote line item details in Workspace. Search for specific products and view the quotes that contain the specific products. You can also select a quote and view the quote details in Oracle CPQ.

**Note:** This search applies only to quotes created from opportunities.

Quotes created from opportunities can have multiple quote line items. When you create quotes from opportunities, you store line item details, such as product name, quantity, price, and discount percentage.

### *Related Topics*

- [Find the Most Recent Items You Worked On](#)
- [Saved Searches](#)

## How is the number of open quotes on the Quotes and Orders summary box calculated?

The Open Quotes and Orders summary box on the Account Overview page shows the number of all active and open quotes associated with opportunities. Active and open quotes refer to the quotes that are marked as in progress for Win Status.

If a quote has multiple versions, the last version of the quote synchronized with the application is considered as an open quote.



## How can I exit the Oracle CPQ Quotes application that opened within the sales application?

Refresh the browser window to exit the Oracle CPQ Quotes application. To go to sales application Home, click the back button on the browser.

## Does the status of a Quote or Sales Order affect the Opportunity status?

No, the status is primarily used for filtering and analytic purposes and doesn't impact the status of an associated opportunity. The aggregate status of a quote or sales order defines the aggregate status of each quote or sales order and valid values include:

- In progress
- Won
- Lost
- Alternate version
- Deleted

However, if you create or update a quote or sales order in the Oracle CPQ quoting application, the associated opportunity, if active, must be updated in your sales application with the same changes. Updates include additions, deletions, and updates to product (revenue) lines on the opportunity.

Other updates, such as issuing the quote to a customer and submitting it as a sales order, are performed only within Oracle CPQ.



# 21 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.

## 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](#)

## FAQs for Quotas

### Frequently Asked Questions (FAQs) for Quotas

This section contains some frequently asked questions (FAQs) for quotas. Scroll or search to find answers to common questions.

#### 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 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.

#### 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.



# 22 Analytics

## Overview of Sales Analytics Pages

Oracle provides a broad set of analytics and analytic pages to give you quick access to key insights and metrics for all aspects of your sales organization.

This table shows the various options for using analytics for sales organizations.

Sales Analytics	What's Available
Prebuilt or Build-Your-Own Analytics	Your application comes with over 150 prebuilt analytics. There are role-based analytics as well as analytics for the organization in general. Administrators create and edit analytics, as well as add them to the user interfaces. If you want to build your own, there is an easy drag-and-drop editor for creating analytics.
Sales Infolet Page / Sales Pages	You get to the Sales Pages by navigating from the Home page using the white navigation dots. The Sales Infolet page comes enabled, and prebuilt with infolets specific to many of the roles in your organization. The five Sales Pages are enabled and configured by your administrator.
Analytics Tabs	Many of your work areas such as Opportunities, Contacts, Accounts, and the Analytics page, provide additional Analytics tabs with detail in context to the information you're viewing. These tabs appear along the side of the page.  Typically, administrators and some manager roles add analytics tabs to work areas for users.
Analytics Page	From the Home page click Sales and then click Analytics. Users search and make analytic favorites which persist on this page as long as they remain favorites. This page also shows analytics recently viewed by the signed-in user.

## Sales Analytics Interfaces

Oracle Sales provides many options for getting key analytic data for sales users.



Watch video

### Sales Analytics Pages

With Oracle Sales analytics you have analytics interfaces right at your fingertips. You can make favorite analytics on your Analytics page, and your administrator can add analytics to your Sales Pages.

Interfaces where you view analytics:

- **The Sales Pages:** The Sales Infolet page comes enabled and prebuilt with analytics specific to many of the sales roles. The Sales Pages are enabled and configured by your administrator.
- **The Analytics Page:** You personalize this page by adding favorite analytics. It also shows recently viewed analytics.

**Note:** Depending on your implementation and software version, some page icons, menu links, and navigator options may not be available.

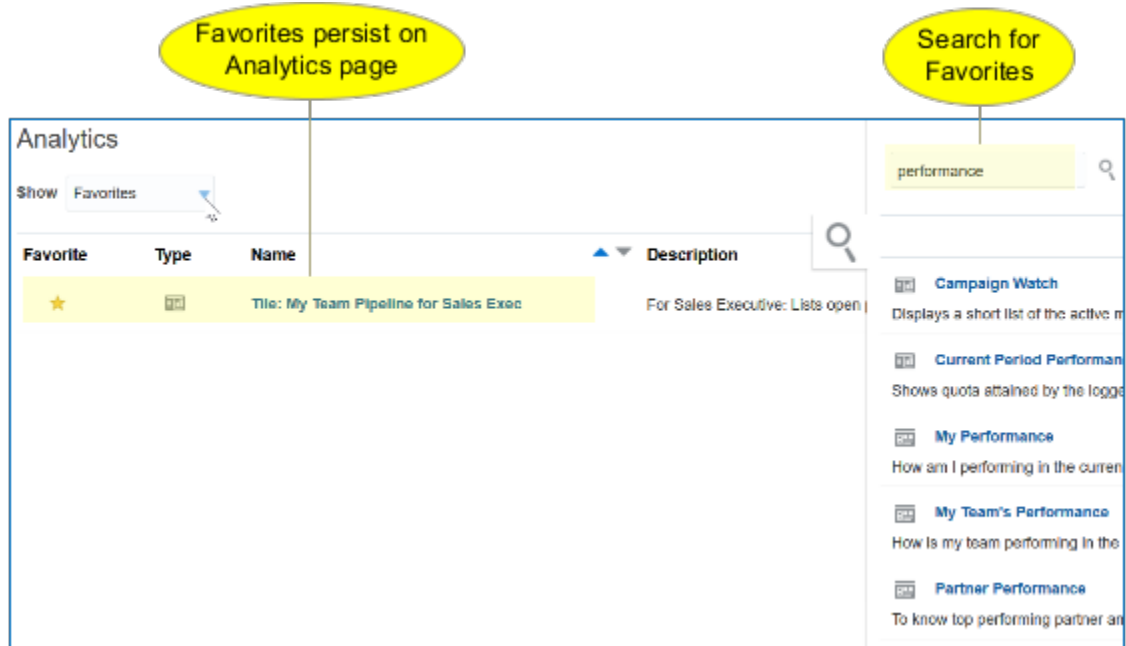
## Exploring the Sales Infolet Pages

The sales infolet pages contain analytics that can be viewed on mobile, tablet, or laptop. Clicking an infolet drills down to more detail on an analysis. Your administrator can change the content that you see on these pages. The Sales Infolet page comes prebuilt with analytics that show data specific to the many sales roles in your organization..

## Exploring the Analytics Page

From the Home page you get to your Analytics page by clicking **Sales** and then **Analytics**. You configure which analytics you see on this page by searching for analytics, and marking them as your favorites. Favorites remain on your Analytics page to view at any time.

This figure shows the Analytics page with the Search for analytics option and the favorites marked with the gold star.





# 23 Microsoft 365

## 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:** Oracle recommends that you use the Redwood User Experience version of the Microsoft Outlook add in. See the *Implementing Sales guide chapter* for more information.

 [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.

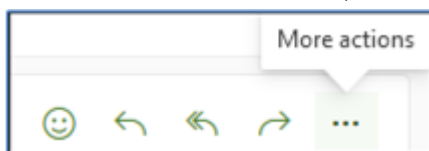
### Related Topics

- [Home Page](#)

## Sign In to Outlook for the First Time

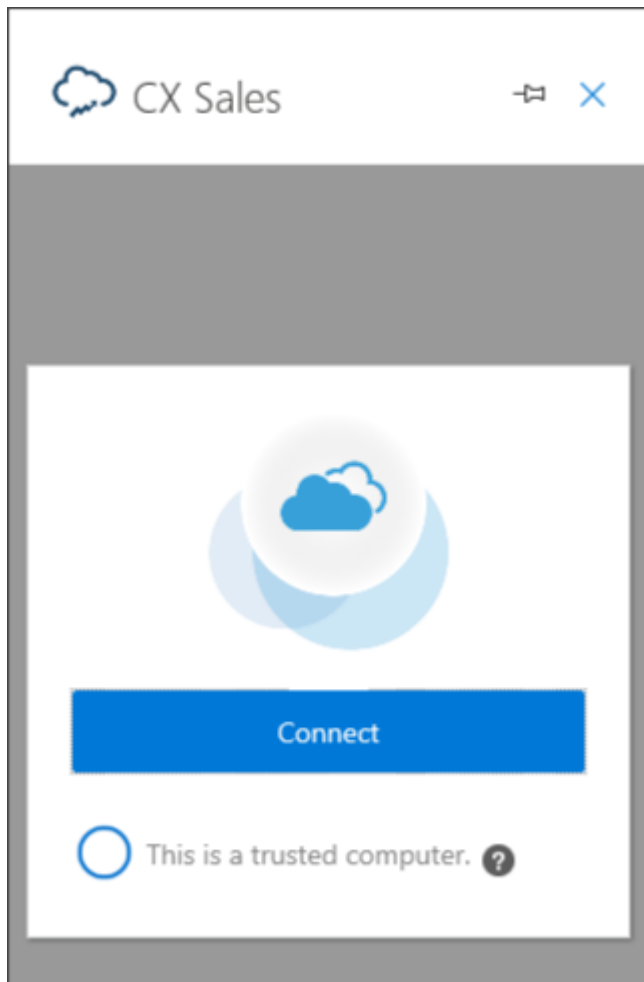
Here's how to sign in to Outlook for the first time:

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**.



## Main Add-In Components

### Home Page

Integrate your sales application and Microsoft 365 to access your cloud data, such as contacts and appointments, through the side panel. You can also manage synchronization settings for contacts and activities using the side panel.

As long as you're signed into the add-in, you see the add-in home page when you open or preview an email. The add-in displays relevant information about all the known and unknown contacts associated with the email.

Here are the three main regions of the add-in home page:

- Records

- Connections
- Activities

## Records

View the accounts, open opportunities, and open leads associated with a contact in the Records tab. Associate an email as an activity with any of the accounts, opportunities, and leads. Resources on the email are automatically added to the activity.

**Note:** If the contact you're viewing isn't the primary contact of a lead, the lead isn't displayed as a related record.

When you have gone deep into the records and want to get back to the homepage, use the home icon instead of back button.

## Connections

View a list of resources from your company who have interacted most with the contact. These connections are listed in the order of resources with most interactions to resources with least interactions. Interactions are a set of emails, appointments, and calls with the contact.

You can view interactions from the current month, back to the first email, appointment, or call logged against the contact. You can also select a specific month or year to view activity history for that point in time.

### Example of Familiarizing with Contacts Using Top Connections

If you're a new salesperson who just took over a sales account and want to learn more about that account from your colleagues, look at the Top Connections tab. Here, you can see the salespeople from your company who interacted the most with the contacts on your customer side. You can connect with such colleagues and learn more about that sales account and people on that account. Take a look at this example where Robin prepares himself before he starts communicating with his new customer, Smith.

Robin Marlow is a salesperson in Penny Pack LLP. He spends a significant amount of time working on Outlook. Recently, he took over Service Sales in the North America region and is introduced to several new accounts that he's not familiar with.

Robin receives an email from Smith Wilson of First Software.

- He looks through the top connections to see if anyone from his company has worked with Smith in the past and decides that Daniel Grayson is the ideal resource to contact.
- He views Smith's upcoming activities through the side panel and finds that Smith has an appointment scheduled with Daniel.
- He creates a task to call Daniel later in the day to learn more about Smith and the appointment scheduled for next week.

Robin's call with Daniel gives him details about Smith's interests and activities and Robin is now better informed about the contact before he interacts with him.

## Activities

View the history of a contact's activities in the Activities tab. You can also create, edit, and delete activities using the side panel.

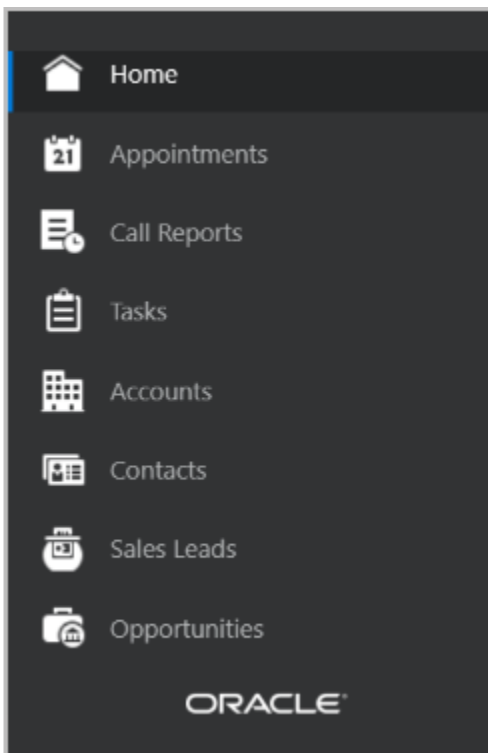
The activities created, edited, or deleted in the side panel are automatically updated in your sales application. However, if you import an activity to your sales application and synchronize it with Microsoft 365, the activity exists in Microsoft 365, even after you delete in your sales application. You must delete the activity in Microsoft 365 as well.

#### Related Topics

- [Create New Sales Records](#)
- [Share Email and Meetings](#)

## Lists of Sales Records

The add-in provides convenient access to the other sales records that are relevant for you. Use the navigator to see them. You can select an object to see its corresponding sales records. For example, select Accounts, to get the list of accounts you own.



## Share Email and Meetings

Share emails and meetings that you send or receive from your Microsoft 365 account with your sales application.

You can share emails and meetings related to a specific account, contact, opportunity, or lead with your team in your sales application to provide them with any relevant information or history related to the customer. Sharing emails and meetings associates the email or meeting as an activity with the relevant account, opportunity, or lead. You can also search for other accounts, opportunities, and leads that you have access to.

Take a look at these examples to help you understand sharing emails and meetings:

## Share Emails

Let's say you're a salesperson handling the North America region for laptop sales. You're in conversations with a customer on their requirements for your new range of laptops.

You have just received an email reply from the customer with some questions on pricing. You would like to associate this email with an existing opportunity in your sales application so that you can share it with your manager and other salespeople on your team.

Open the email to view the side panel. Click **Share Item** on the Related Records tab. On the Share Email page, search for and select the relevant opportunity, and click **Save**. You have now saved your email in your sales application for the selected opportunity, making it available for your team to review. When salespeople open the opportunity, they can now view this email as an activity associated with the opportunity.

## Share Meetings

To further discuss the customer's requirement, you decide to organize a meeting to discuss with the customer.

Create a meeting in Outlook. While creating the meeting, open the side panel. Click **Share Item** on the Related Records tab. On the Share Meeting page, search for and select the customer, and click **Save**.

**Note:** If you don't find the Share button, contact your administrator so that she can enable the Share button on the tab.

## Share a Meeting Received from an Email ID Held by Multiple Contacts

Assume that you were invited to a meeting by a customer contact. When you try to share, you find that more than one existing contact in your sales application uses the same Email ID from which you received the meeting. In such cases, you can select the right contact you want to share the meeting with in the sales application. Here are the steps:

1. Select the appointment you want to share with the sales application. The Microsoft 365 add-in home page shows a number on top of the contact photo. The number corresponds to the number of contacts sharing the same Email ID from which you received the appointment.
2. Click **Share Item** to share the appointment with the sales application. The Share page shows the list of contacts sharing the same Email ID. By default, you find that all the contacts are selected. You can deselect the contacts not relevant to the Email ID.
3. Click **Share**. The add-in associates the meeting with the selected contact. You find that the appointment is now labeled as "Shared with Oracle".

**Note:** This way, you can get rid of email duplication.

### Related Topics

- [What happens when I share an email with my sales application?](#)
- [How can I share an email with my sales application?](#)
- [Can I share my Microsoft 365 email attachments with my sales application?](#)

## View Sales Record Details

From the add-in, you can see sales record details in various ways.

### View Account, Contact, Lead, and Opportunity Details

See the accounts, contacts, leads, and opportunity details from the side panel.

### See Opportunity Quotes and Download the Proposal

From the Microsoft 365 add-in, you can see quotes for your opportunities. If a proposal was generated for a quote in the sales application, you can download it from the add-in. Here are the steps to view quotes and download the proposal associated with a quote:

1. Open an opportunity and go to the **Quotes and Orders** tab.
2. You can see the details, such as quote name, status, amount, and version.
3. If a quote has a proposal generated in your sales application, you can find the link to the proposal. Click the link to download the proposal. The proposal is downloaded as a PDF file.
4. To view the corresponding record of this quote in your sales application, select the **Open in CX Sales** option from the menu (the ellipsis . . . icon).

### View Service Requests

Use the service request functionality to review and update service requests in the Microsoft 365 side panel, without explicitly going into your sales application. You can also link service requests to emails to send to or receive information from your customers.

Service requests are available here:

- Related records in the side panel
- Related items in the Accounts and Contacts tabs

Click on an applicable service request to see its details.

## Create New Sales Records

Add contacts to your sales application from your Microsoft 365 account and maintain a consolidated list of contacts to work more effectively.

Use the side panel to identify which of your contacts, from an email or a meeting, exist in your sales application and which you need to add.

### Add Contacts to Your Sales Application

You must have an email open in Microsoft 365 Outlook to add a contact to your sales application. If your contact already exists in the sales application, the side panel displays the name of the contact. If the contact doesn't exist in the sales application, the Microsoft 365 home page prompts you to add the contact.

Here's how you can add a contact to your sales application:

1. Open an email in Microsoft 365.
2. Click **Create Contact**.
3. In the Create Contact page, add details like first name, last name, or mobile number. The Email field already shows the sender's email. Change it, if needed.
  - o The add-in tries to match the details of your existing Outlook contacts that aren't yet shared with the sales application. If there are any matches, the people icon on the top of the page shows the number of matching records. Click the icon to see if the contact you were trying to add is in the list. If yes, select that record and click the **Copy Details** button. The details are copied from Outlook.
  - o If there are no matching records with Outlook contacts, fill in the required information about your new contact.
4. Usually, the contacts you add are all business contacts. So, you may want to tie the contacts to the accounts they belong to.
5. Fill in other details such as job title, affinity, and mobile or work phone.
6. For the address fields, you can use the account address of the contact instead of typing in their personal address. To do so, select the **Use Account Address** check box.
7. Save the contact. The full name of the contact you just added appears in the side panel, confirming that the contact is added to your sales application.

**Note:** All the contacts you add appear in the Contacts list view. If your contact list is too big, use the search option to look up a contact. When searching, enter first name of the contact and press **Enter** key on your keyboard, so that the add-in searches for the contact details on the server as well.

To edit or open the contact in your sales application, click the ellipsis icon on the home page and select the option you want.

## Set Communication Preference of a Contact

Among your contacts, some people may not want to be called on the phone, emailed, or get mails to their home or office address. You can indicate the communication preference as Do Not Call, Do Not Email, or Do Not Mail from the Microsoft 365 add-in. If you have set do-not-contact preferences in the sales application, the add-in indicates them in the Contacts list view.

Here are the steps to turn on the communication preferences from the add-in:

1. Open **Contacts** from the menu.
2. For an existing contact, edit the record. For a new contact, set the preference when creating the contact.
  - o **Do Not Call** is available on the contact number fields. Once you set this, the indicator reflects the preference for all the contact numbers.
  - o **Do Not Email** is available on the Email fields. Once you set this, the indicator reflects the preference for all the email IDs of the contact.
  - o **Do Not Mail** is available on the Address fields. Once you set this, the indicator reflects the preference for all the addresses of the contact.
3. Save the contact.

# Bi-Directional Sync for Appointments

## Overview of Bidirectional Sync

Bidirectional sync is the sync pattern where the current and future appointments are synced between Outlook and Sales. It's the default sync pattern for appointments.

During synchronization, all appointments that users share from Outlook with Sales are categorized as **Shared with Oracle**. This category means that a copy of the appointment has been created in Sales. Depending on your configuration of appointment sync, when a user updates or deletes an appointment in Sales, the changes are synced to Outlook, and vice versa.

**Note:** Any appointment that's not included in the default saved search criteria set by the user or the administrator is never synced.

## Appointments That Aren't Synced in Bi-Directional Sync

These appointments aren't synced in bidirectional sync:

- Appointments that are outside of a saved search
- Past appointments

### Appointments Outside of Saved Search Aren't Synced

Appointments that fall out of the saved search criteria set by the user or the administrator, aren't synced.

### Updates to Past Appointments Aren't Synced

Appointments that have a start time or an end time before the sync job runs, aren't synced between Outlook and the sales application, irrespective of the saved search chosen by the user. However, if a past appointment has a **Shared with Oracle** category, it is shared with the sales application but updates to that appointment aren't synced.

Here's a list of scenarios, where past appointments aren't synced:

- Past appointments that were modified in the sales application or in the saved search aren't synced to Outlook. The Shared with Oracle category isn't cleared for the appointment in Outlook because the copy of the appointment still exists in the sales application.

**Note:** The administrator gets an error message when a saved search that fetches past appointments is selected in Microsoft 365 designer.

- Past appointments that fall outside of saved search in the sales application aren't synced. The Shared with Oracle category isn't cleared for the appointment in Outlook because the copy of the appointment still exists in the sales application.
- Past appointments that were modified in the sales application and not in saved search aren't synced.



- A past appointment that was already shared with the sales application and is modified later in Outlook isn't synced to the sales application.
- A past appointment that is deleted in the sales application isn't deleted in Outlook, however, the Shared with Oracle category is cleared because the appointment no longer exists in the sales application.
- A past appointment that is deleted in Outlook is not deleted from the sales application.

## FAQs for Bi-Directional Sync

### Do the appointments shared with the sales application show the account they're related to?

An appointment shared with the sales application displays the account name that's associated with the recipient. The table below covers the scenarios when the account name is shown for a shared appointment.

Invitee of the Appointment	Shows the Account Name?
The invitee is a CX Sales contact, associated with an account.	Yes
The invitee is a CX Sales contact, not associated with any account.	No
The invitees are CX Sales contacts from the same account.	Yes
The invitees are CX Sales contacts. Some of them are from the same account and the others aren't associated with any account.	Yes
The invitees are CX Sales contacts from different accounts.	No
None of the invitees are associated with any account.	No

### Can I manually share a past appointment from Outlook in bidirectional sync?

If a past appointment has the Shared with Oracle category, you can share the appointment manually with the sales application.

However, updates you make to the past appointment aren't synced to the sales application.

## What happens if I manually remove the Shared with Oracle category for a past appointment in Outlook?

In bi-directional sync, even if you manually remove the Shared with Oracle category for a past appointment in Outlook, the appointment won't be deleted from the sales application.

In one-way sync, when you remove the category of a past appointment, the copy shared with the sales application is deleted.

## Adaptive Search for the Add-in

### How does Adaptive Search work in the Microsoft 365 add-in?

For the Microsoft 365 add-in, Oracle's Adaptive Search works on these dynamic choice lists:

- Accounts
- Contacts
- Opportunities
- Leads

To begin the search, users start typing few characters and click the search icon. Based on the setup, the add-in returns the search results for you.

Let's understand this with an example. You're creating an appointment in the add-in, and you want to associate an opportunity with that appointment. The Sales application may contain hundreds of opportunities, and searching for one, especially if you have forgotten the name, can be challenging. If the administrator has enabled Adaptive Search and keyword search on opportunity attributes like the account, the contact, or the creation date, you can search for your opportunity by entering a value for any of these. For example, you remember that you created the opportunity in May; you can search with the keyword: 5/.

You begin the search on the fly. You can see all the opportunities that contain 5 or 5/ in the name, creation date, or any attribute enabled for Adaptive Search. Simply select the opportunity and save the appointment you were creating.

**Note:** You must enter a few characters for the search to begin.

#### *Related Topics*

- [How Dynamic Choice Lists Show Options](#)

## What are dynamic choice lists?

Dynamic choice lists are the fields that show you several values to select from. You select the most relevant one for your task. Dynamic choice list fields display a search icon, indicating that you can search for a specific option.

In the Microsoft 365 add-in, you can find dynamic choice lists for accounts, opportunities, leads, and contacts.

**Note:** Dynamic Choice lists with simple and advanced filters aren't supported in the Microsoft 365 add-in. If you add such a dynamic choice list to an edit page in the mobile application, it displays all the values in the list, not just a filtered list. On selecting a value that's not in the filtered list, you see an error when saving the record.

## What's a smart list?

When you click the search icon in a dynamic choice list field in the Microsoft 365 add-in without entering any search criteria, the add-in retrieves a "smart list" of items using certain predefined parameters.

Examples of these predefined parameters include recently created, updated, or visited records, based on user interactions in the sales applications.

Because smart lists are based on user context, they can help you quickly find the right items you're searching for. Smart lists are enabled on the dynamic choice lists in accounts, primary contact search, activity contact search, opportunities, and leads. Your administrator configures the additional details (attributes) that are displayed for each item in the smart list.

**Note:** Smart lists are based on interactions in the sales application, in the add-in, and in the mobile app.

## How Dynamic Choice Lists Show Options

Dynamic choice lists display options in several ways:

- Autofilling with default values
- Showing inline suggestions, based on certain conditions, especially when Advanced Share mode is enabled
- Showing a search list powered by Adaptive Search
- Rendering a smart list when you haven't entered any search keywords

**Note:** Dynamic choice lists with simple and advanced filters aren't supported in the Microsoft 365 add-in. If you add such a dynamic choice list to an edit page in the mobile application, it displays all the values in the list, not just a filtered list. On selecting a value that's not in the filtered list, you see an error when saving the record.

This table explains how the different dynamic choice lists display options in Advanced Share mode and in the create or edit mode.

Dynamic Choice List	Advanced Share Flow	Create or Edit Record Flow
Account	<p>Auto-filling:</p> <p>The add-in auto-fills an account name, based on the primary contact that's selected.</p> <p>Inline suggestions:</p> <p>When you click the field, it shows a list of primary accounts of the contacts on your email or meeting as inline suggestions.</p>	<p>The auto-filling, Adaptive Search, and smart list act the same way as described in the column, Advanced Share Flow.</p> <p>The difference is, you don't get inline suggestions in this mode.</p>

Dynamic Choice List	Advanced Share Flow	Create or Edit Record Flow
Primary Contact	<p>Auto-filling:</p> <p>The add-in auto-fills the name of the contact you selected in the home page, as your primary contact. If you have selected a resource or person not in sales application, the add-in auto-fills the name of first contact found on the email or meeting.</p> <p>Inline suggestions:</p> <p>When you click the field to change the auto-filled primary contact, the add-in shows inline suggestions.</p>	<p>No auto-filling</p> <p>Inline suggestions:</p> <p>When the account is selected: The add-in shows the list of contacts related to that account as inline suggestions.</p> <p>When the account isn't selected: You don't get inline suggestions. Move on to search or smart list.</p>
Activity Contact	<p>Auto-filling:</p> <p>The add-in auto-fills other contacts on the email and meeting.</p> <p>No inline suggestions.</p>	<p>No auto-filling</p> <p>No inline suggestions</p>
Opportunity	<p>No auto-filling</p> <p>Based on the contact selected, inline suggestions appear when you click or tab into the Opportunity field.</p> <p>Tip: If you're tabbing into the field using a keyboard, press the down arrow to see the inline suggestions. For email and appointment share, when you click or tab into the Opportunity field, the inline suggestions are based on the account selected, not the contact.</p>	<p>No auto-filling</p> <p>Inline suggestions available if an account is selected.</p>
Lead	<p>No auto-filling</p> <p>Based on the contact selected, inline suggestions appear when you click or tab into the Lead field.</p> <p>Tip: If you're tabbing into the field using a keyboard, press the down arrow to see the inline suggestions. For email and appointment share, when you click or tab into the Lead field, the inline suggestions are based on the account selected, not the contact.</p>	<p>No auto-filling</p> <p>Inline suggestions available if an account is selected</p>

**Note:** Adaptive Search and smart lists are same for all these fields. See the other search-related topics in this chapter to learn more about them.

### Related Topics

- [What's a smart list?](#)
- [How does Adaptive Search work in the Microsoft 365 add-in?](#)
- [What are dynamic choice lists?](#)

## Add Objectives to Your Appointment, Call Report, or Tasks

From the Microsoft 365 add-in, you can add goals or objectives you want to achieve or have achieved from an appointment, call report, or task.

With objectives laid out, you can stay focused on what you want to target and gain from these meetings or tasks.

Here's how you can add objectives to your appointments, call reports, or tasks:

1. In the add-in, open an Appointment, Call Report, or Task for which you want to add objectives. Go to the Edit mode.
2. In the Activity Objective section, use the + icon to add the objectives. The add-in shows default objectives. You can create custom objectives as well. To create custom objectives, enter your objective's name in the text field that has the watermark 'Create custom objective' and press the **Create** button.
3. Next, opt the objectives and add them to the appointment, call report, or task.
4. If an objective is already met, mark it as Complete.
5. Save the appointment, call report, or task.

## Sync Records Between the Sales Application and Microsoft 365 Outlook

Save time by using the synchronization feature. Sync your Microsoft 365 and sales application data by running the sync engine.

The sync engine comprises these regions:

- Enable sync
- Define the sales records to be synced with Microsoft 365 Outlook
- Synchronize contacts
  - Contact sync settings
- Activities sync settings
- Summary of sync errors

## Enable Sync

Your administrator can enable or disable the sync engine. If sync is enabled, then the application runs the synchronization process at scheduled intervals. If it's disabled, then the records aren't automatically synced between Microsoft 365 and your sales application.

## Define the Sales Records to be Synced with Microsoft 365 Outlook

You can select predefined saved searches from the side panel or create your own saved search in the sales application. When you select a saved search, the corresponding records matching the saved search are synchronized with Microsoft 365 when the next synchronization runs.

These are the predefined saved searches options for contacts and activities such as meetings and tasks.

**Note:** The fields exposed on these predefined saved searches can't be removed even if they're saved with a different name. If needed, you can modify their criteria.

Saved Search	What Gets Searched
All Contacts	All contacts in your sales application
My Business Contacts	All contacts belonging to all the accounts you own
My Contacts	All contacts, of the type account, that you're an owner of
My Favorite Contacts	All your favorite contacts
My Open Activities	All meetings that are open and you're a resource for in your sales application

## Synchronize Contacts

You can synchronize contacts between Outlook and your sales application. When the add-in syncs new contacts from Outlook, it uses the company name of the contact to find the Sales account for that contact. If the sync process finds a matching account, the contacts is created in the sales application and is associated with that account. Contacts from the sales application can also be synchronized into Outlook. Changes that are made to synchronized contacts, whether they're made in Outlook or in the sales application, are synchronized to the other.

### Contact Sync Settings

Use this region to set the parameters for syncing contacts. You can select the list of contacts that are synced. Additionally, you can select the conflict resolution rule.

Resolution Option	Description
Cloud version wins	The contacts in your sales application overwrite the contacts in your Microsoft 365 account
Outlook version wins	The contacts in your Microsoft 365 account overwrite the contacts in your sales application

Resolution Option	Description
You decide	You select the way you want to resolve the conflict if there's a conflict

## Activities Sync Settings

Use this region to set the parameters for syncing meetings and tasks. You can select the list of meetings and tasks that are synced. Additionally, you can select the conflict resolution rule.

Resolution Option	Description
Cloud version wins	The meetings and tasks in your sales application overwrite the meetings and tasks in your Microsoft 365 account
Outlook version wins	The meetings and tasks in your Microsoft 365 account overwrite the meetings and tasks in your sales application
You decide	You select the way you want to resolve the conflict if there's a conflict

## Summary of Sync Errors

Here you can see the sync summary and list of errors when a sync fails.

The summary is segregated into three regions:

- Last sync: This region displays information of the latest sync.
- Outlook: This region displays the number of meetings, tasks, and contacts synced to your Outlook account.
- CX Sales: This region displays the meetings, tasks, and contacts synced to your sales application account.

**Note:** The synced records can either be new records added to your account or existing records updated with new information.

The error region displays the meetings, tasks and contacts that weren't synced, along with the nature of the error. From here you can go to the individual records and fix the errors. You also have the option to display only the resolvable errors. You can't update those records whose errors you can't resolve.

## Fix Resolvable Sync Errors

When contacts, meetings, and tasks from Microsoft 365 are synced to the sales application, you may get errors due to invalid or missing information in them. Most of the errors due to deficient information are resolvable just by correcting or updating that information.

Here's how you can fix such errors:

1. Go to **Synchronization**.
  - Note:** The Resolve Errors button only appears on the Synchronization page if the errors are resolvable.
2. Click **Resolve Errors**. In the Errors list page, you can see the resolvable errors with an edit icon.
3. Click the edit icon to go to the respective Contacts, meetings, or Tasks page that has the errors.
4. Fix the errors and click **Save**. After you save, the Microsoft 365 add-in directly saves the records to the sales application and takes you back to the Errors list page to resolve pending errors.

## Auto-Sync of Appointments

If your administrator has enabled the auto-sync feature, your appointments are synced between Microsoft 365 and the sales application automatically.

The one-time or recurring appointments that you have created and sent to a CX Sales contact are auto-synced. The Auto-sync of appointments works for both bi-directional and one-way sync patterns.

If your administrator has enabled syncing private appointments, the private appointments that you created and sent to at least one CX Sales contact are auto-synced too.

**Note:** The appointments that don't have any CX sales contact are not auto-synced. Also, the appointments where you're an invitee aren't auto-synced.

### Related Topics

- [Autocapture Appointments](#)

## Update Details in External Appointments

You can update details such as your availability to the meeting and reminder in the external appointments synced to the sales application from Outlook.

Though you can update most of the fields in the external appointments, a few fields still remain read-only. The table here shows what you can change and what you can't.

Fields You Can Update	Read-Only Fields
<ul style="list-style-type: none"> <li>• Account</li> <li>• Opportunity</li> <li>• Lead</li> <li>• <b>Show Time as</b> indicates your availability for the meeting.</li> <li>• Set Reminder</li> </ul>	<ul style="list-style-type: none"> <li>• Externally Owned setting</li> <li>• Private</li> <li>• Subject</li> <li>• Location</li> <li>• Time zone</li> </ul>



Fields You Can Update	Read-Only Fields
<ul style="list-style-type: none"> <li>• Add Attachments</li> <li>• Add Objectives</li> <li>• Add Notes</li> </ul>	<ul style="list-style-type: none"> <li>• Start date and time</li> <li>• End date and time</li> <li>• All Day setting</li> <li>• All the fields on the Recurrence window</li> <li>• Owner</li> <li>• Resources</li> <li>• Contacts</li> <li>• Primary Contact</li> <li>• Description</li> </ul>

## What You Can Do on an External Appointment

You can do these actions on an external appointment:

- Create a follow-up appointment
- Create a follow-up task
- Create a call report
- Delete appointment

## FAQs for Microsoft 365

### Frequently Asked Questions (FAQs) for Microsoft 365

This section contains some frequently asked questions (FAQs) for Microsoft 365. Scroll or search to find answers to common questions.

### Why am I frequently prompted to sign in the add-in?

You will be prompted to sign in only if your sign-in token validity has expired. Let's see what this means.

After your first sign-in, the add-in captures and stores the sign-in token and ensures that the token is valid for the next 48 hours. Whenever you open the add-in within 48 hours, your sign-in token's validity is automatically extended for the next 48 hours. This way, as long as your next session on the add-in is within 48 hours, the add-in won't prompt you to sign in.

But, in situations such as you had a long weekend or you went on a vacation, you might be opening the add-in only after 48 hours from your last sign-in time. By that time, your token validity expires. In such situations, the add-in prompts you to sign in again.

## How do I troubleshoot the error, "There is an issue in communicating with Microsoft Services"?

This error occurs when your Chrome browser doesn't allow third-party cookies, in normal mode or in incognito mode. To resolve this issue, go to your browser settings, enable all cookies, and connect with the add-in.

## Why did my Outlook contact fail to sync with the sales application?

When syncing an Outlook contact with the sales application, the address of the contact is copied from Outlook to the respective address fields in the sales application.

During this sync, if any of the mandatory address fields don't get corresponding data from Outlook, the sync fails. You can fix these type of sync failures from the add-in. See the related topics for more information.

### *Related Topics*

- [Sync Records Between the Sales Application and Microsoft 365 Outlook](#)

## Can I open sales records in the web application from the Microsoft 365 add-in?

Yes. From the add-in, you can open sales application records of contacts, appointments, tasks, call reports, and custom objects. To do so, open the menu (the ellipsis icon ...) from their detail pages and use the Open in CX Sales option.

The corresponding record shown in the add-in will open in your default browser.

## What happens when I share an email with my sales application?

The shared email is associated as a task with the relevant account, opportunity, or lead. Related known contacts or resources are added to the task in your sales application.

## How can I share an email with my sales application?

Use the Share Item feature to share your email with the sales application. Here are the steps to do so:

1. Select an email you want to share.
2. Click **Share Item** under the **Records** tab of the add-in.

3. Select the appropriate accounts, contacts, and sales leads.
4. Click **Share**.

The application shares your email with the selected parties. Notice that Microsoft 365 has categorized your email as Shared with Oracle. All information in the email is saved as an activity of the type email. Go to the **Activities** tab and select this activity to see the details. The shared email's content is copied as plain text into the Description field. You can find the original format of the email as an attachment in the **Attachments** section. You can download the email body from the **Attachments** section.

You can similarly share appointments that you compose in Microsoft 365.

## How can I send a call report as an email?

Open a call report in its detail view. Within the menu (the ellipsis icon ...) use the option Send as Email.

Outlook opens a draft email that has a link to the call report, some default content, a reference to the meeting, and attendees of the meeting. The To field shows email IDs of contacts and assignees of the call report. You can change the content, add more people as recipients, or copy people to the email. Send out the email when ready.

## Can I share my Microsoft 365 email attachments with my sales application?

Yes, you can. Click Share email in the Related Records tab. From the list of contacts, accounts, and attachments associated with the email, select the attachments you want to share, and click Save. Attachments must not exceed 25 MB.

## What's the allowed attachment file type and size for sharing emails?

This topic shows the attachment size limit for sharing emails and for uploading files from objects such as Account and Opportunity.

- Images: JPEG, GIF, PICT, PNG, TIFF: 2 MB
- Microsoft files: PPT, DOC, EXCEL: 10MB
- Video: QT, MP4, .XMS: 10 MB
- Audio: M4A, MPEG3, AAC, .WAV: 2 MB

For uploading files from objects such as Account and Opportunity:

- Upload a file: 10 MB
- Upload contact or avatar image: 2MB

**Note:** If you have a locally-installed Outlook application and the Edge browser on Windows computers, you can't use Microsoft 365 add-in to download the attachments that have been uploaded to the sales records. Alternatively, you can download them from the sales application.

## Why doesn't the category of my email show the sales application after I share it?

The category is added to your email only after Outlook updates the inbox. To categorize instantly, click Send/Receive on the Microsoft 365 ribbon. Click Update Folder and select the email.

## Can I share a meeting that is still in the compose mode in Desktop Outlook?

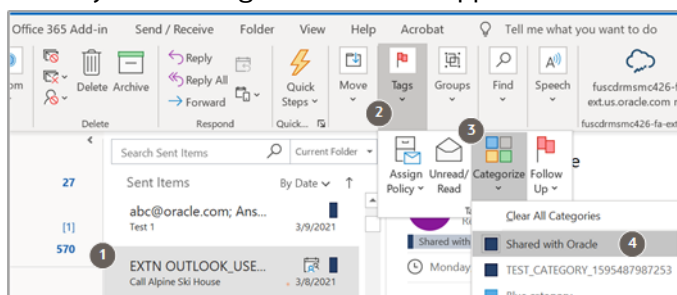
Yes, but ensure that you send the meeting invite and run the sync job to share the meeting.

Here's how you share a meeting:

1. Create a meeting in Outlook calendar and add invitees.
2. Open the add-in when you're scheduling the meeting.
3. Click **Share and Save**.
4. Send the meeting to the invitees.
5. Run the Microsoft Instant Sync job.

Another way of sharing is to categorize the meeting as **Shared with Oracle**.

1. Create a meeting in Outlook calendar and add invitees.
2. Select the email you want to share with the sales application (callout 1).
3. Under Tags (callout 2), expand **Categorize** (callout 3), and click **Shared with Oracle** (callout 4). The sync engine shares your meetings with the sales application in the next run of the Microsoft 365 standard sync process.



## What happens if I create or update records in the side panel?

When you create contacts or tasks using the side panel, the records are automatically synced with the sales application, and the application creates the corresponding records both in the Microsoft 365 add-in and in the sales application.

This action isn't dependent on the sync settings. When you or another user updates a contact in the side panel, the application automatically updates it in Microsoft 365 as well. Similar is the case when you update tasks. But, when another user, not the owner, updates a task, then the sync engine deletes the linked task in Microsoft 365.

Note that when you delete any of these records, the corresponding records aren't automatically deleted in the sales application. The sync engine deletes the records when the next sync process runs.

## Why can't I open the sales application records from the Microsoft 365 side panel?

You can't open the records because the profile option FND\_CLASSIC\_INTERFACE is enabled. Disable this profile option to view your sales application records from the Microsoft 365 side panel.

## Why aren't my sales application user preferences visible in the Microsoft 365 side panel?

Any change that you make to user preferences in your sales application is reflected in the side panel only after you sign out of the add-in, restart Outlook, and sign in again.

## Why are the saved searches for the appointments read-only?

Your administrator could have turned on one-way sync on appointments, which means, your meetings are synced from Outlook to the sales application but not the other way around.

With one-way sync on:

- Changes to the meetings in sales application don't reflect in Outlook.
- Meetings that exist only in the sales application aren't synced to Outlook.
- You can't use saved searches for appointments.
- Because changes don't cascade from the sales application to Outlook, your invitees can't receive any notifications on any updates you make to the meetings saved in your sales application.
- The errors you resolved in the Appointment records, from the **Resolve Sync Error** page, reflect in the sales application only. Generally, the sales application won't update or create any appointments in Outlook.

## Why didn't the invitees within my organization get notification when I updated a meeting I created?

While creating a meeting, ensure that you select the category as 'MS allows invitee record update'. So that, whenever you update the meeting after it's shared with the sales application, your invitees will receive notifications about the update.

## Will my internal and external invitees be notified when I update a meeting shared with my sales application?

Yes. If you have shared your appointment with the sales application, your internal and external invitees will receive notification when you make updates.

## Can I share a meeting I received from an external contact with the sales application?

Yes. If you're a resource in the sales application and an active user of the Microsoft 365 add-in, the appointment created by an external contact showing up in your Outlook is shared with the sales application.

If the external contact updates the meeting, the updates are also shared automatically with the sales application.

## Why can't I find the option I am looking for, even though I am using Adaptive Search?

Remember that Adaptive Search works based on the configurations your administrator decided for you. Here are the possible reasons why you can't find an option:

1. If your administrator didn't mark a field as searchable, Adaptive Search doesn't look for the values of that field. Let's see an example. Assume your administrator didn't configure the Job Title as a searchable field in the Primary Contact object. When you search for a primary contact by their job title, you can't find that contact.
2. You can't search by the fields that aren't supported by Adaptive Search. For example, you can't search a Primary Contact based on favorites, because, the Favorite check box can't be enabled for the Adaptive Search.

## In the search results page, I can't see the attributes that were there earlier. What should I do to see them again?

Contact your administrator to enable Adaptive Search on those attributes, so that you can see them again in the search results.

## Why do some records in the smart list not seem to match my search criteria?

The Microsoft 365 add-in generates a smart list by searching against multiple attributes of a record, not just the name. If any of the attributes within the records contain your search criteria, they also show up in the smart list.

On the face of it, it may appear to you that the record that doesn't contain your search text also showed up on the list. But, that's not true. To see the matched text in the records, hover over the information icon on the right side of the records in the smart list. An information box appears showing the matched text in bold. You get an idea of the attribute that caused the record to appear on the smart list.

## Why isn't an account created when I create a contact?

When you add a new Sales contact as part of creating an email – and neither the contact or an associated account exist in Sales – you can create the contact on-the-fly, but you can't create the account as part of this flow. However, after creating the contact, you can open the contact in the web application using the Open in CX Sales action and quickly create the account.

# Microsoft Teams

## Microsoft Teams

Converting an opportunity into a sale requires teamwork. Add members to your opportunity and business plan teams and create a Microsoft Team with them.

Communicate and collaborate with your team members in the Microsoft Team and take your deal to closure.

See these topics to learn more about creating an opportunity and business plan teams and collaborating on Microsoft Teams:

- Opportunity Teams
  - [Add Team Members to an Opportunity](#)
  - [How can I collaborate on opportunities using Microsoft Teams?](#)
  - [What happens to the Microsoft team I created, when an opportunity closes?](#)
  - [Re-create a Team for an Opportunity Team in Microsoft Teams](#)
- Business Plan Teams
  - [Collaborate on Business Plans Using Microsoft Teams](#)
  - [Re-create a Team for a Business Plan Team in Microsoft Teams](#)

With Sales assistant within Microsoft Team, your team members can see opportunity, account, or contact details. They can create notes, call reports, tasks, and appointments and do lot more.

See these topics to learn about all the capabilities of sales assistant when using Microsoft Teams:

- *Overview of Sales Assistant Features*
- *Microsoft Teams Specific Features*



# 24 CX Sales Mobile

## Overview of CX Sales Mobile

The Oracle CX Sales Mobile app helps you to manage your day effectively and develop customer relationships using your phone or tablet.

- Manage Sales Activities:
  - Action driven home page, with a sales briefing to track your pipeline and stay on top of daily activities..
  - 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.
  - Use 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 the mobile device to CX 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 allow sales administrators to provide unique experiences to sales representatives, managers, and others.
- Manage Partner Relationship Management Activities:
  - Partners can effectively manage and improve channel sales on the go.
  - Channel Managers can track the overall channel sales and also manage partner, partner contacts, and related information easily.
- Oracle Sales Assistant Chatbot:
  - Use Oracle Sales Assistant to help you perform your daily sales-related tasks. Using your phone, you can type or use your voice to ask questions and sales assistant retrieves the information, or acts on your requests.
  - Sales Assistant reduces manual data entry, and makes it easier to view and update sales records using voice commands or typing.
- Boost Productivity on the Go::
  - Modern and intuitive experience, designed to boost productivity with fast and seamless interactions.
  - At-a-glance record view for quick grasp of summary, key and related information.
  - Access actions relevant to your task for fast and easy record updates..
- Use the Powerful Search Capabilities:
  - Fast and simple search across all objects in one place.
  - Use multi-keyword search across multiple fields for faster and easier access to desired information.
  - Search more easily with recent searches and type ahead results displaying results as soon as you type.

- Filter results by object types.
- Sign In Quickly and Easily:
  - Scan QR Code to sign in easily using your Single Sign On, or basic authentication.
  - Use face or fingerprint recognition to securely sign in to the app.
- Use Your Phone or Tablet:
  - Use either your phone or tablet to access the app. Using a tablet changes the display to 2x portrait mode.
- Use Offline:
  - View and edit Oracle CX Sales data in areas with no network connection.
  - Sync automatically when a connection is re-established.

## Get Started with CX Sales Mobile

The Oracle CX Sales Mobile app helps you manage your day effectively and develop customer relationships using your phone or tablet. An action-driven home page helps you prepare for meetings with the clients, stay on top of key activities for your accounts, and track your pipeline anytime or anywhere.

### Install and Sign In to the App

First of all, you need to install the app and sign in. Here's how:

1. Open the App Store, or Google Play, and search for Oracle CX Sales Mobile application, and then tap **Install**.
2. Open the app and accept the legal terms.
3. If you have a QR code, tap the **QR Code** button and scan the QR code using your mobile device's camera. Then go to step 5.
4. If you don't have a QR code, tap either **Single Sign On** (if you have SSO access), or tap **Basic Authentication**. Enter the host name your administrator has given you and then tap **Next**.

**Note:** If you have problems entering the host name, make sure that the auto-correct isn't changing the values you're entering.

5. Enter either your SSO details, or your CX Sales user name and password. Tap **Next**.

Once you have signed in, you will be given the option of setting up fingerprint recognition, or face recognition, to sign in to the app in the future. If you would like to enable this at another time, tap the menu icon on the bottom left-hand side of the app and then tap **Settings**.

### Navigate Around the App

Use the home page to manage your pipeline and tasks. To show the list of sales objects, such as Opportunities, Accounts, and Contacts, tap the menu icon on the bottom left-hand side of the app. Then tap the feature to retrieve a list of items - for example, tap Opportunities to get a list of your open opportunities. To view the item details, tap any item in the list view. In the list view, tap the more icon on an item to access frequent actions, such as adding a note.

When you're viewing a sales object's details, not only can you view and edit the details - such as updating the account address, or opportunity win probability - you can also quickly access other actions for the sales object, such as logging a call or creating a task, by just tapping the more icon in the details page.

You can also use Oracle Sales Assistant to help you perform your daily sales-related tasks. Sales Assistant is a chatbot that you can send questions or commands to and it retrieves the information, or acts on your requests. Tap the chat icon on the bottom right hand side of the app and in the chat screen just type your request, or use the microphone to say your request.

## Add Contacts

You can sync individual contacts from your mobile device's address book to the app by tapping the plus icon in the **Contacts** list page and then tapping **From Address Book**.

You can also add contacts by using a photo of a business card. Just take a photo of a business card using your mobile device's camera, or use an existing photo, and a new contact is created in the app using the information on the business card. Here are the exact steps::

1. Tap the plus icon in the **Contacts** list page.
2. Tap **From Business Card**.
3. Tap either **From Photo Gallery** to use an existing photo, or tap **Take Photo** to take a photo of the card using your mobile device.
4. Check and, if required, edit the contact details, and then tap **Save**.

**Note:** Here are some points to note about the business card feature:

- Only business cards in English are supported at this time.
- Only US address formats are supported at this time.
- The business card needs to contain an email address. The domain name (@example.com) is used to search for an existing account. If a single account is found, then the account details are populated automatically in the new record. If more than one is account found, then the account field is left empty, and you will need to select an account.
- The app has a list of job titles that are used to match the job title on the business card. If a match can't be made, then you can add it to the record, and the job title is added to the job title list so that it can be used in the future. Also, if you edit a job title then this is added to the job title list as a new job title, so that you can use it again.
- For best results, you should use a photo of the actual business card. Don't use a photo which is a picture of a business card on a monitor, for example, as the image quality won't be good enough.
- Ensure that there is a good color contrast between the business card background and the text on the card as

## Personalize Your Home and Reports Pages

You can show, hide, and reorder the cards that appear in your home page and your reports page, enabling you to personalize the pages so that they work best for you.

Here's how you personalize your home and reports pages:

## Personalize Your Home Page

1. Scroll to the bottom of the home page and tap **Personalize**.
2. Tap **Hide this card** to hide a card in your home page.
3. Reorder the cards by using the arrow buttons on the card.
4. When you're happy with your personalization, tap **Done**.

## Personalize Your Reports

1. In the Reports page, tap the more button (three horizontal dots), and then tap **Personalize**.
2. Hide and reorder the cards by following the same steps for personalizing your home page.
3. When you're happy with your personalization, tap **Done**.

## Reset the Home and Reports Pages

To return to how the home page and reports pages were originally configured, follow these steps:

1. In the home page, scroll to the bottom of the home page and tap **Personalize**. In the Reports page, tap the more button (three horizontal dots), and then tap **Personalize**.
2. Scroll to the bottom of the pages and tap **Reset to Default**.
3. Then tap **Reset** to confirm.

## Offline Usage

### Can I use CX Sales Mobile when I am not connected to Wi-Fi and I haven't got a cell phone signal?

Yes, you can view, create, and edit records in the app even when you're offline. When you lose your network connection, a message is displayed to indicate that you're working offline.

At the top on the page, a banner displays how many updates will be synchronized when you're back online and also how long it's been since you last synchronized your data.

When the network connection is restored, the application automatically synchronizes the updates you have made on your mobile device to Oracle CX Sales. Alternatively, you can manually sync the records by tapping the offline banner at the top of the page and then tapping the more icon in the Pending Sync page.

### What data can I see in the offline mode?

All of the data that you view in the application when you're online will be available when you're offline. Also, all of the sales objects that your administrator has specified for offline use are available in the offline mode.

The data you created, edited, or deleted when you were offline is synchronized with the CX Sales web app when CX Sales Mobile detects a network connection. Alternatively, you can sync the records manually by tapping the offline banner at the top of the page and then tapping the more icon in the Pending Sync page.

## How can I synchronize my offline data?

Your data synchronizes automatically with the CX Sales web app when your mobile device detects a network connection and goes online.

Alternatively, you can manually sync the records by tapping the offline banner at the top of the page and then tapping the more icon in the **Pending Sync** page.

## What happens if there's an issue when your offline updates synchronize with the CX Sales web app?

You can find a list of records that have synchronization issues by tapping the synchronization banner at the top of the app.

Once the issues have been resolved, you can sync the records manually by tapping the more icon and then the **Retry Sync For All** button.

**Note:** If Oracle CX Sales Mobile detects a data conflict between CX Sales Mobile and the CX Sales web application, then the updates you have made in CX Sales Mobile override the updates made in the Oracle CX Sales web app.

## FAQs for CX Sales Mobile

### Frequently Asked Questions (FAQs) for CX Sales Mobile

This section contains some frequently asked questions (FAQs) for CX Sales Mobile. Scroll or search to find answers to common questions.

### Which mobile devices are supported?

To find out which mobile devices and operating systems are supported by CX Sales Mobile, see the System Requirements for Oracle Applications Cloud page at <https://www.oracle.com/system-requirements/>.

### What's the default language?

CX Sales Mobile uses the language set on your device as the default language.

## What note apps can I use with CX Sales Mobile?

As well as the note app that's provided with your mobile device, you can use other notes apps - such as Google Keep or OneNote - to create and share notes.

## Can I scan a business card to create a contact or lead?

Yes, you can add contacts and leads by scanning a business card using your mobile device's camera, or by using an existing photo of a business card. The app creates a new contact or lead using the information on the business card. Here are the steps:

1. Tap the plus icon in the **Contacts** or **Leads** list page.
2. Tap **From Business Card**.
3. Tap either **From Photo Gallery** to use an existing photo, or tap **Take Photo** to take a photo of the card using your mobile device.
4. Check the newly created contact or lead details and, if required, edit the details. Then tap **Save**.

**Note:** Here are some points to note about the business card feature:

- Only business cards in English are supported at this time.
- Only US address formats are supported at this time.
- The business card needs to contain an email address. The domain name (@example.com) is used to search for an existing account. If a single account is found, then the account details are populated automatically in the new record. If more than one is account found, then the account field is left empty, and you will need to select an account.
- The app has a list of job titles that are used to match the job title on the business card. If a match can't be made, then you can add it to the record, and the job title is added to the job title list so that it can be used in the future. Also, if you edit a job title then this is added to the job title list as a new job title, so that you can use it again.
- For best results, you should use a photo of the actual business card. Don't use a photo which is a picture of a business card on a monitor, for example, as the image quality won't be good enough.
- Ensure that there is a good color contrast between the business card background and the text on the card, as this enables a better scan.
- Make sure that there's only one contact on the business card. You can't scan a card that contains more than one contact as the app can only create one contact for each business card

## Can I scan a barcode to view an asset or create an asset record?

Yes, click **Assets** in the navigator, click the barcode icon, and take a photo of the barcode. The asset record is displayed and you can create an asset record containing the asset details.

## How can I log a call report?

Open the main menu and tap Calls to Log. Tap the activity you want to log, enter the information, and tap Save.

Alternatively, when you view your list of opportunities, accounts, tasks, and so on, just tap the more icon (three horizontal dots) on a record, and then tap **Create Call Report**.

Lastly, you can also create a call report from a sales object's detail page (such as an opportunity, lead, or task detail page). Open the detail page, scroll down to the bottom of the page, and in the **Add** section, tap **Call Reports**.

When you create or edit a call report, you can record many aspects of the activity, including logging the objectives that you have achieved, and adding resources and attachments.

## How can I view my call reports?

Open the main menu and tap Call Reports.

You can also see a call report that's related to an opportunity, lead, task, and so on, by opening the details page and scrolling to the **Call Report** section.

## Why has the note I created become a PDF attachment?

Some note apps, for example the OneNote app, create a note as a PDF file. CX Sales Mobile recognizes the PDF as an attachment, rather than a note, and adds the file to the record as an attachment.

## What type of files can I attach to a record?

You can attach photos, videos, audio recordings, Word documents, PowerPoint presentations, Excel files, plain text files, and PDFs.

You can attach one video to a record, and up to three other file types.

## How can I use Sales Assistant to help me with my sales-related activities?

You can use Sales Assistant to help you perform your daily sales-related tasks via your phone.



Type or use your voice to ask questions and sales assistant retrieves the information, or acts on your requests. Sales Assistant reduces manual data entry, and makes it easier to view and update sales records using voice commands or typing.

See the Sales Assistant chapter in the Using Sales guide for more information about how you can use Sales Assistant.

#### *Related Topics*

- [Overview of Sales Assistant](#)
- [Features of Sales Assistant](#)
- [CX Sales Mobile Specific Features](#)

## When does a message appear to confirm that you have created a record?

A confirmation message appears when you have successfully created a new record, your lead conversion is in-progress, and your lead conversion is complete. These messages remain briefly before closing automatically. You also have the option to close the message.

The confirmation message appears for the following sales objects:

- Leads
- Opportunities
- Accounts
- Contacts
- Tasks
- Appointments
- Call reports
- Assets
- Service requests
- Custom objects

When a new record is created, the confirmation message contains a **Review** button which opens the new record if you tap it.

**Note:** This doesn't apply to lead conversion **in-progress** or **complete** messages.

If you're offline when you create a new record, or convert a lead to an opportunity, the confirmation message appears when you're back online.



# 25 Sales Assistant

## Overview of Sales Assistant

Sales Assistant is a chatbot that you can use to access sales information and perform sales activities. You enter questions or commands, and the Sales Assistant retrieves the information or acts on your requests. The Sales Assistant reduces manual data entry, and makes it easier to view and update sales records through text in Microsoft Teams and through either text or voice in CX Sales Mobile.

Things to note:

- **Supported Channels:** Microsoft Teams, CX Sales Mobile
- **Supported Language:** English
- **Supported Objects:** Accounts, Appointment, Contacts, Opportunities, Service Requests, Tasks, Sales Leads, and Custom objects

Administrators can enable or disable different objects for each channel.

- **Security:** When using Oracle Sales Assistant in Microsoft Teams, you're prompted to sign in to CX Sales via a sign-in button the assistant sends to you when you first converse with it. After you sign in, the assistant continues the conversation with you.

To use Oracle Sales Assistant in CX Sales Mobile, you can use the chatbot right away after you sign in to Oracle CX Sales Mobile.

For any channels, the same functional privilege you have in CX Sales applies when entering into conversations with the Sales Assistant.

## Where to Get Help with Sales Assistant Setup

If you need help with enabling Oracle Sales Assistant, send a message to the Sales Assistant forum on Oracle Cloud Customer Connect. Here's the URL:

<https://cloudcustomerconnect.oracle.com/resources/dee2ff3bf7/summary>

### Related Topics

- [Overview of Sales Assistant Setup](#)
- [Set Up Oracle Sales Assistant for Microsoft Teams](#)
- [Set Up Oracle Sales Assistant for CX Sales Mobile](#)

## Features of Sales Assistant

The sales assistant skill helps you to view and update sales records through text or voice commands. You can either type or use the speech-to-text feature on your mobile device to communicate with the sales assistant.

## Features of Sales Assistant for Supported Channels

Here are the main Sales Assistant features for all supported channels:

Feature	Description	Sample Phrases to Use
Context	<p>The sales assistant recalls the context of records within a conversation between you and the sales assistant. For example, you're viewing the details of an appointment and you then navigate to view the associated opportunity's details. The sales assistant remembers the appointment that you viewed previously, so that if you request more details about the appointment, the sales assistant recalls the details.</p> <p>Maybe you want to view the account associated with the appointment? Once again, the sales assistant knows the account you want without having to prompt you based on the context of records within the previous conversation.</p> <p><b>Tip:</b> You must specify the object in context that you're asking about in the phrase.</p>	<ul style="list-style-type: none"> <li>• Show account for this appointment</li> <li>• Get the tasks for this account</li> <li>• What are the appointments for this opportunity?</li> <li>• Show detail for this contact</li> </ul>
Suggest Most Recently Accessed Records	<p>If you ask Oracle Sales Assistant for a record without providing context, the assistant suggests some records, if available, from the ones most recently accessed by you. This lets you to easily view and act on the record you are searching for.</p>	<ul style="list-style-type: none"> <li>• Get account</li> <li>• Get leads</li> </ul>
Search for a Record	<p>There are a couple of ways you can search for a record (of any object that's enabled for your specific channel) with the sales assistant:</p> <ul style="list-style-type: none"> <li>• By Workspace's keyword search - Based on the phrase you send to search for a record, the sales assistant will extract the keyword and do a search against the object using workspace's keyword search. For example, "View Oracle account".</li> </ul> <p>The assistant will first try to search against the records that are most relevant to you. However, if you can't find the record you want within this set, then you can expand and see matches from within your full set of accessible records for the specific object type.</p> <p><b>Note:</b> Formula fields aren't searchable because they can't be configured in Adaptive Search and can't be indexed.</p> <ul style="list-style-type: none"> <li>• By one or more fields that are enabled by Adaptive Search - (in addition, the fields must be enabled in the Oracle Sales Assistant skill.) For more than one field, use the "and" operator between the fields. For example, "show me the opportunities with win probability greater than 90 and closing next month".</li> </ul> <p>The following search operators are supported:</p> <ul style="list-style-type: none"> <li>• And</li> <li>• Greater than</li> <li>• Greater than</li> </ul>	<ul style="list-style-type: none"> <li>• Get account &lt;search value&gt;</li> <li>• Get details for account &lt;search value&gt;</li> <li>• Get opportunities in the qualification stage</li> </ul>

Feature	Description	Sample Phrases to Use
	<ul style="list-style-type: none"> <li>• Greater than and equal to</li> <li>• Equal to / in</li> <li>• Less than</li> <li>• Less than and equal to</li> <li>• Between</li> </ul> <p><b>Tip:</b> If you don't send a value to search on, such as "get opportunity", the assistant will prompt you for which record you're looking for. If you were already conversing with the assistant regarding a specific record of that type, then the assistant will respond with the details of the specific record.</p> <p><b>Tip:</b> Always include the object name (or its synonym) in the utterance you send to the assistant.</p>	
<p>Saved Search Lists from Workspace</p>	<p>Ask for saved search lists from Workspace.</p> <p><b>Tip:</b> To display a specific list, specify its name as close as possible to the name of the saved search.</p> <p>My Lists are lists with "Show Lists" filter set to true. They allow you to view the most relevant results based on object activity and context.</p> <p><b>Tip:</b> If there is more than 1 list with "Show List" filter set to true, the assistant will return all lists for you to choose from.</p> <p>In addition, you can also view a list of similar saved searches that match your search criteria. Click Show all saved searches to display all of your saved searches for the object you are looking for.</p>	<ul style="list-style-type: none"> <li>• Show all accounts</li> <li>• Get my open opportunities</li> <li>• View my lists of contacts</li> <li>• Show all saved searches</li> </ul>
<p>Child or Related Records</p>	<p>You can view child or related records (of any object that's enabled for your specific channel), such as notes. For example, you want to view the notes on an account and the assistant will find the account and show you the notes associated to the account, if there are any.</p> <p><b>Tip:</b> You must specify the parent object that you're asking about in the phrase.</p>	<ul style="list-style-type: none"> <li>• Show me the notes for the oracle account &lt;search value&gt;</li> </ul>
<p>Request Specific Field Values for Records</p>	<p>You can directly ask for values of fields on a record and quickly get the information. When you ask questions or send commands, the sales assistant can provide a specific standard or custom field value for a record.</p>	<ul style="list-style-type: none"> <li>• What is the win probability for this opportunity?</li> <li>• Get the industry for the Vision account.</li> </ul>

Feature	Description	Sample Phrases to Use
Use Sales Briefing	<p>Obtain a snapshot of your day.</p> <p><b>Tip:</b> By default, open pipeline is the list of open opportunities that are in the current and next fiscal quarter closed period. However, the pipeline period can be modified by your administrator.</p>	<ul style="list-style-type: none"> <li>• Hey, how's my day today?</li> <li>• How's my day today?</li> <li>• Sales briefing</li> </ul>
Appointments	<p>The sales assistant supports additional features for appointments:</p> <ul style="list-style-type: none"> <li>• Next appointment: You can check for details of your next appointment in your calendar, if any. For example, you can request for a briefing of your next appointment to prepare for it before going to the appointment.</li> <li>• Current appointment: You can check for details of your appointment that's currently in progress, if any. For example, during an appointment, you can request a briefing to receive a quick re-cap of the objectives of your current appointment.</li> <li>• Follow up: You can follow up on an appointment that ended by creating a follow-up call report, creating a follow-up task, or scheduling a follow-up appointment. Send a keyword to search for an appointment, such as "follow up on the demo presentation" or simply send "follow up". If you don't specify which appointment you want to followup on, the assistant will show you the most recent appointments (appointments which occurred and ended in the past 30 days), and you can select one to continue. If the appointment you want isn't showing in the list of recent appointments, simply send keyword(s) to search for the appointment you're interested in.</li> </ul> <p><b>Tip:</b> When scheduling a follow up appointment, the sales assistant creates the appointment on the date and time based on your time zone configured in CX Sales.</p> <p>Things to consider:</p> <ul style="list-style-type: none"> <li>• You can directly create a follow-up call report outcome, schedule the next appointment, or add a follow-up task for an appointment by using phrases such as "create follow-up call report," "schedule next appointment," or "create follow-up task".</li> <li>• In-progress appointments aren't returned as a recent appointment to follow-up on.</li> <li>• Some fields, such as the Subject field, defaults from the original appointment you're following up on for: <ul style="list-style-type: none"> <li>○ Follow-up call report</li> <li>○ Follow-up task</li> <li>○ Follow-up appointment</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Next meeting</li> <li>• Current appointment</li> <li>• Show me a briefing of my next appointment</li> <li>• Follow up</li> <li>• Create follow-up call report</li> <li>• Schedule follow-up appointment</li> <li>• Add a follow up task</li> </ul>
Tasks	<p>The sales assistant supports additional features for tasks:</p>	<ul style="list-style-type: none"> <li>• Get tasks due today</li> <li>• View tasks due December 2021</li> </ul>

Feature	Description	Sample Phrases to Use
	<ul style="list-style-type: none"> <li>• Get tasks due on a certain day: You can ask for tasks that are due on a certain day or month.</li> <li>• Overdue tasks: You can get your tasks that are overdue.</li> <li>• Create tasks: You can create a standalone task conversationally or as a follow-up of an appointment.</li> </ul> <p>For more information, see Create Records in the Microsoft Teams Specific Features and CX Sales Mobile Specific Features topics.</p>	<ul style="list-style-type: none"> <li>• Show tasks due this week</li> <li>• Show tasks due on March 19</li> <li>• Get my overdue tasks</li> <li>• Overview Tasks</li> <li>• Create Task</li> </ul>
Notes	For any object that has notes as a child object, you can ask the assistant to add a note. The assistant prompts you for the note details to add to the record you want.	<ul style="list-style-type: none"> <li>• Add a note to this opportunity</li> <li>• Add note to &lt;keyword&gt; search account</li> </ul>
Synonyms	The sales assistant understands the synonyms for objects and fields that are defined by your administrators. Synonyms allow the sales assistant to understand your company's jargon. For example, instead of sending "show the opportunity", you can send "show the oppty" to the assistant. It will still understand you're asking to see an opportunity.	<ul style="list-style-type: none"> <li>• Opportunity - oppty, opty, deal</li> <li>• Account - acct, company</li> <li>• Contact - person</li> <li>• Task - to-do, todo</li> <li>• Appointment - meeting, appt</li> </ul> <p>Sample synonyms for fields:</p> <ul style="list-style-type: none"> <li>• EffectiveDate (for Opportunity) - closing, close date</li> <li>• State (for Account) - province</li> </ul>
Filtering a List of Records	<p>When you ask the sales assistant a question, for example, to find opportunities in the open pipeline, it responds with a list of records. From the list, you can select a record to drill in to, view, and act on the record. To quickly get to the record of interest, you can perform searches to filter any list by sending a keyword or by specifying a field and value to filter on.</p> <p><b>Tip:</b> Filtering the list is always based on the original list - not the filtered list. You can send a keyword based on the fields showing on the list card or based on what's enabled for your company's keyword search for the object.</p> <p><b>Tip:</b> You can filter any saved search list either by a keyword or by specifying a field and value to filter on. However, when asking for a record and if the assistant shows a list of matches, you can only filter this type of list by keyword.</p>	Not applicable
Cancel a conversation with multiple steps	You can cancel a conversation at any stage during a multistep conversation flow. For example, if you want to create a task, sales assistant prompts you with several questions. At any point during this process, you can enter a command or phrase such as "restart" to exit the flow. This saves you time and means you don't have to follow through with a conversation you no longer want to pursue.	<ul style="list-style-type: none"> <li>• Restart</li> <li>• Reset</li> </ul>

Feature	Description	Sample Phrases to Use
Provide Tips During a Conversation	<p>Sometimes Oracle Sales Assistant provides tips about recommended next steps at the end of a conversation.</p> <p>This feature improves the user experience of the Oracle Sales Assistant as it helps you learn how to use the Sales Assistant by providing examples of what you can say at certain parts of the conversations. Each tip is shown once a day and is displayed up to 5 times to a user. You can click "Got it" to stop the tip from showing again.</p>	Not applicable
Provide Help During a Conversation	Users can also request help when viewing a list or summary card. The assistant responds with a help message matching the context of the list or summary card.	<ul style="list-style-type: none"> <li>• Help</li> </ul>

## Microsoft Teams Specific Features

You request information by entering questions or sending commands and sales assistant retrieves the information or acts on your requests. You can greet the assistant or ask for help.

Here are some sample phrases you can use:

- Hi
- Hello
- Hey
- Get started
- Start
- What can you do for me?
- What can you do?
- What can I do?

Things to note:

- In Microsoft Teams, the sales assistant may be part of a digital assistant with other Oracle supported skill from Oracle Cloud applications, so that you can interact with one assistant for its various services.
- Oracle Digital Assistant handles the initial greeting as well as any requests for help. If there are multiple skills (including the sales assistant) added to your digital assistant, the digital assistant returns suggestions for what you can do with each of the skills.

## Features

Here are the Sales Assistant features specific to Microsoft Teams users.

Feature	Description
Actions	There may be special actions which administrators can enable to allow you to act on a specific record. These actions are displayed as a button on the summary card. For example, if enabled on the



Feature	Description
	<p>opportunity, account and contact summary cards, the "Add a note" button lets you add a note to the record.</p>
<p>Create Records</p>	<p>Records with values such as Notes, Call Reports, Tasks, and Appointments can be created conversationally. The assistant prompts for information to create the record. When all the questions defined are asked, a confirmation message prompts you to confirm the creation of the record with the input provided.</p> <p>For fields that aren't mandatory, you can choose to skip the field and not provide an input value. For fields that are mandatory with a default, you can choose to accept the default value or provide an input.</p>
<p>List of Records</p>	<p>For lists that have more than 5 records, you can use the Next and Previous buttons for easy navigation.</p> <p>See "Filtering a List of Records" in the main Sales Assistant features table to quickly find a record without navigating through the list.</p> <p>To see more details for a record, you can click anywhere on the row of the record in the list. To select the record for further conversations, you can either click the index number button or send the index number, such as "3".</p>
<p>Deep Links</p>	<p>Deep links are links that let Microsoft Teams users drill directly down into a record, such as an opportunity record and are available only for certain intents.</p> <p>For Microsoft Teams Mobile app users, the deep link also goes to the CX Sales mobile app. However, if you switch from using the mobile app to the web or desktop app, then the deep links initially sent with the mobile app record card are maintained for that specific record. Any other cards you receive with deep links when conversing on the desktop client are sent to the CX Sales web app.</p>
<p>Attachments</p>	<p>For any object (of any object that's enabled for your specific channel) that has attachment as a child object, you can ask the assistant to attach a file to the records.</p> <p>Things to consider:</p> <ul style="list-style-type: none"> <li>• The Sales Assistant in Microsoft Teams configuration must support uploading and downloading files.</li> <li>• Files shared with Sales Assistant through Microsoft Teams are uploaded to Microsoft Teams and saved to the record in CX Sales as either a file or as a URL attachment.</li> <li>• You can only upload one file at a time to CX Sales and 20 MB is the maximum file size.</li> <li>• For Microsoft Teams on iOS or Android, you can choose from your files on your device to attach to a record via the sales assistant. The sales assistant currently doesn't support attaching photos from gallery to your CX Sales records.</li> </ul> <p><b>Note:</b> Depending on your device, you can save the photos in gallery to your files on your device.</p> <p>Sample phrase you can use:</p> <ul style="list-style-type: none"> <li>• Attach a file</li> <li>• Add file</li> <li>• Upload a document</li> <li>• Attach a doc to this account</li> </ul>

Feature	Description
Notes	<p>For any object that has notes as a child object, you can ask the assistant to add a note. The assistant prompts you for the note details to add to the record you want.</p> <p>Sample phrase you can use:</p> <ul style="list-style-type: none"> <li>• Add a note to this opportunity</li> <li>• Add note to &lt;keyword&gt; search account</li> </ul>

## CX Sales Mobile Specific Features

You can use the Sales Assistant by tapping the chat icon on the bottom right hand side of the CX Sales Mobile app.

In the chat screen, you can type and send your request to the Sales Assistant using the chat box at the bottom of the page, or tap the microphone icon to say your request.

### Features

Here are the Sales Assistant features specific to CX Sales Mobile users.

Feature	Description
Using Voice	In the chat screen, you can either type or ask the assistant something. To type, tap on the white chat box at the bottom of the screen. To use voice to speak to the assistant, tap on the green microphone icon.
List of Records	<p>For lists that have more than 3 records, you can use the 'View All' button. Tap the button to see the full list of records.</p> <p>See "Filtering a List of Records" in the main Sales Assistant features table to quickly find a record without navigating through the list.</p> <p>To see more details for a record, you can tap the white section of the item. To select the record for further conversations, you can tap the purple portion of the item.</p>
Attachments	<p>For objects that are enabled for your specific channel and have an attachment as a child object, you can ask the assistant to attach the file to the object's records. It will launch the attachment form for you to share notes, photos, videos, documents, or files from your mobile device to CX Sales records.</p> <p>Sample phrases that you can use:</p> <ul style="list-style-type: none"> <li>• Attach a file</li> <li>• Add file</li> <li>• Upload a document</li> <li>• Attach a doc to this account</li> </ul>
Notes	For any object that has notes as a child object, you can ask the assistant to add a note. The assistant prompts you for the note details to add to the record you want.

Feature	Description
	<p>Sample phrase you can use:</p> <ul style="list-style-type: none"> <li>• Add a note to this opportunity</li> <li>• Add note to &lt;keyword&gt; search account</li> </ul>
<p>Create records</p>	<p>Notes, Call Reports, Tasks, and Appointments can be created conversationally. The assistant prompts for information to create the record. When all the defined questions are asked, a confirmation message prompts you to confirm the creation of the record with the input information provided.</p> <p>At any time when the assistant is asking for information, there is an option to switch to a form to complete the creation by tapping <b>Switch to Form</b>. Any questions answered in the conversation prior to switching to the form are populated in the form. Tapping <b>Save</b> brings you back to the conversation.</p> <p>For fields that aren't mandatory, you can choose to skip the field and not provide an input value. For fields that are mandatory with a default, you can choose to accept the default value, or provide an input.</p> <p>For objects that aren't supported for conversational create, asking the assistant to create the record will launch the record creation page.</p>
<p>Update records</p>	<p>Asking the assistant to update the record will launch the update page for the record.</p> <p>Sample phrases that you can use:</p> <ul style="list-style-type: none"> <li>• Update opportunity</li> <li>• Update the Supremo account</li> </ul>
<p>Welcome message</p>	<p>Your administrator can create a new or modify an existing welcome message with some suggestions of what sales representatives can do and say to the sales assistant which are relevant to your business.</p>

*Related Topics*

- [Can I modify the Sales Assistant welcome message for CX Sales Mobile?](#)



# 26 LinkedIn Sales Navigator

## Overview of LinkedIn Sales Navigator

LinkedIn Sales Navigator helps sales teams acquire new business, expand existing customer relationships, and maximize sales productivity. Use the LinkedIn Sales Navigator to:

- Get introduced to buyers through your company's network with TeamLink.
- Spot new buyers that appear at your target accounts with saved search.
- Get immediate alerts when a lead engages with your marketing campaigns.
- Proactively track champions through real-time alerts including role changes.
- Find distributed buyers at the account with lead search.
- Connect with warm outreach with a personalized InMail.

To learn more about LinkedIn Sales Navigator, visit [sales.linkedin.com](https://sales.linkedin.com).

### Related Topics

- [Enable LinkedIn Sales Navigator for Accounts, Contacts, and Leads](#)
- [Supported Platforms for the LinkedIn and Sales Integration](#)
- [Remove Mashup Content for LinkedIn Sales Navigator for Accounts](#)

## Use the LinkedIn Sales Navigator

View the LinkedIn profile details of an account, contact or lead.



You can access the information in the LinkedIn Sales Navigator region from these pages:

- Edit Account: Profile page for an account
- Edit Contact: Profile page for a contact
- Edit Lead: Summary page for a lead

Use your LinkedIn credentials to sign in to LinkedIn Sales Navigator.

Here are the tasks you can do with the LinkedIn Sales Navigator:

Task	Description
View Profile	View the complete LinkedIn profile details of an account, contact, or lead.

Task	Description
Connect	Request to connect on LinkedIn by sending an invite.
Send Message or Send InMail	Send messages to first-level connections. Alternatively, use an InMail to connect with contacts or leads at other levels.
Icebreakers	Explore common interests and conversation starters with the selected account, contact, or lead.
Get Introduced	Request an introduction through a mutual connection.
Match Profile	Associate an accurate profile when LinkedIn suggests multiple profiles that match with an account, contact or lead. Once associated, you can see the matched LinkedIn profile in your account, contact, or lead records.
Not this person	Use this option if LinkedIn displays profiles that don't belong to the selected account, contact, or lead.

Before you can use LinkedIn Sales Navigator, your administrator must enable it and you must have Team or Enterprise licenses.

*Related Topics*

- [Enable LinkedIn Sales Navigator for Accounts, Contacts, and Leads](#)
- [Remove Mashup Content for LinkedIn Sales Navigator for Accounts](#)

## Associate LinkedIn Records with Accounts, Contacts and Leads

You can use LinkedIn Sales Navigator to build and nurture sales relationships that increase sales performance. Use LinkedIn Sales Navigator to associate LinkedIn records with accounts, contacts, and leads.

The association helps to connect with the relevant people for contacts and leads or companies for accounts. To receive information about a new contact or lead, search in LinkedIn with a few basic details such as name or job title. With LinkedIn Sales Navigator, you get a detailed overview of your contact or lead. Your administrator has to enable the LinkedIn Sales Navigator for you on the contact and lead pages. The steps given here use contacts as an example. Use similar steps to associate a lead or an account with a LinkedIn record.

Here's how to associate a contact with a LinkedIn record.

1. On your Sales application home page, click **Sales > Contacts**.
2. Click **Create Contact**.
3. Enter the first name, last name, and job title.
4. Click **Save and Close**.
5. Click to open the newly created contact and expand the LinkedIn region of the Contact detail page.
6. Click **LinkedIn Sales Navigator**.

**Note:** LinkedIn suggests potential matching profiles for Contacts and Leads and suggests matching companies for Accounts.

7. Select the relevant person that you want to associate with.
8. Click **Match**.

You receive a notification saying that the contact is matched to the contact.

9. Click **Save in Sales Navigator** to save the association.





# 27 Service Requests

## 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.

## Overview of Service Request User Tasks

You can create and manage service requests once your sales administrator enables the service request offering. To create a service request (SR), select the Service Requests menu from the Navigator page, and on the Service Requests list page, click Create Service Request.

Here are some of the high-level user tasks that you can perform for service request management:

- Capture service requests  
You can capture new service requests through user data entry, APIs, or file import.
- Organize and assign service requests  
You can organize and assign service requests to queues either manually or using the Assignment Manager feature. You can also assign service requests to team members through the **Assign To** field in the service requests UI.

- Manage the lifecycle of a service request

A service request typically moves through the statuses: New, Waiting, In Progress, Resolved, and Closed. You can modify the statuses per your requirements if you have sufficient privileges.

See the [Using Fusion Service](#) guide for more information about sales user tasks for service requests.

See the [Implementing Fusion Service](#) guide for more information about service requests setup tasks.

# 28 Sales Lightbox

## Overview of Sales Lightbox

With the Sales Lightbox content library, you can store, access, and share files, such as slide decks, web-based content, and .pdfs. The following is a high-level summary of the content library features:

- **Upload and access stored content:** Upload content from your computer to the library for later access and sharing. Supported file types include .pptx, .html (in the form of microsite .zip files), and .pdf. The image file types .jpg and .png are supported as separate file types as well.
- **Find content:** Browse and search for library content. Search includes file name, owner, and keywords.
- **Share content:** Share content with other users, with sales accounts, and with sales opportunities. Joint ownership also is supported.
- **Create new presentations on the fly:** For .pptx files only, assemble new slide decks using slides from the library.
- **Add to cart:** For .pptx files only, add slides to your cart.

The topic, [Available Lightbox Actions for Different Content Types](#), has full details of the available actions for each file type.

## Library Views

When you open the library, you see these views:

- **My Content:** Displays all content that you own. This includes content that you have uploaded and all the content that was shared with you by other users. Documents can be shared with or without joint ownership.
- **Shared Content:** Displays all content that you own, and all the content that's shared with you by other users.

If you're an administrator, you also see the **All Content** view: This view displays all content uploaded by all users, including all content that belongs to the administrator. For more administrator information, see the [Implementing Sales guide](#).

For more information about user tasks in the content library, see the online help and the [Using Sales guide](#).

### *Related Topics*

- [Available Actions for Different Content Types](#)
- [Open Content](#)
- [Download Content](#)
- [About Uploading Content](#)
- [Search for Content](#)

## Available Actions for Different Content Types

In the Sales Lightbox content library, different file types carry different available actions. For example, slides presentations can be added to the cart, but microsite and .pdf files can't.

Here's a list of actions that you can perform with different Lightbox file types.

Action	PowerPoints	PDFs	Microsites	Images
Upload	Yes	Yes	Yes	Yes
Download	Yes	Yes	Yes	Yes
Update	Yes	Yes	Yes	Yes
Open	Yes	Yes	Yes	Yes
New Pages	Yes	Yes	No	No
Share	Yes	Yes	Yes	Yes
Add to cart	Yes	Yes	No	No
Delete	Yes	Yes	Yes	Yes
Search	Yes	Yes	Yes	Yes
View properties	Yes	Yes	Yes	Yes

Here's a list of actions with different Lightbox file types and the information that you must consider while performing them.

Action	Information
Upload	<ul style="list-style-type: none"> <li>Slides must be .pptx files.</li> <li>Microsites must be .zip files. See the topics, Using Microsites in the Lightbox Content Library and Creating and Uploading a Microsite .Zip File: Procedure: Procedure, for more information.</li> <li>Image files must be .jpg or .png format.</li> </ul>
Share	Sharing is possible with other users, accounts, and opportunities, including joint ownership.
Delete	The file owner can delete files that she owns. Administrators can delete any content.

Action	Information
Search	<ul style="list-style-type: none"> <li>• Slides: Can use file name, owner, or keyword in the document.</li> <li>• PDFs: Can use file name, owner, or keyword in the document.</li> <li>• Microsites: Can use file name or owner. If keyword search is enabled within the microsite, can search by keyword. If keyword search isn't enabled, then the main .html file is scrubbed of HTML tags and stored as searchable content.</li> <li>• Image files: Can use file name and owner.</li> </ul>
View properties	<ul style="list-style-type: none"> <li>• Slides: Can view file name, owner, number of slides, date and time uploaded, current version number, number of downloads, number of views, number of shares.</li> <li>• PDFs: Can view file name, owner, date and time uploaded, views, number of downloads, number of shares.</li> <li>• Microsites: Can view file name, owner, number of pages, date and time uploaded, current version number, number of downloads, number of views, number of shares.</li> <li>• Image files: Can view file name, owner, number of slides, date and time uploaded, current version number, number of downloads, number of views, number of shares.</li> </ul>

## About Bursting and Assembling Content

The terms burst and assemble have specific definitions in the context of the Lightbox content library.

- **Burst:** Users burst content when they open a file in Lightbox. The act of "bursting" refers to the application displaying the individual pages of a file as it's opened. During this process, after splitting a file into individual pages, the application analyzes the pages, saves them, and creates records for them in the database.
- **Assemble:** Users assemble content when they save individual pages to a cart and download them. Assembling means content with pages from one or more different files (of the same content type) is saved to the cart, potentially rearranged, and then downloaded. During assembly, in the background, the application compiles the files into a single file set.

For more information about using the content library, see the online help and the Using Sales guide.

## Create Content

### Overview of Creating Content

To be able to upload presentations to the Sales Lightbox content library, you first create them and then save them to your hard drive.

Lightbox supports these file types:

- **Microsoft PowerPoint:** The content library supports the Open XML file format (.pptx 2007). 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.
- **PDF:** You can upload .pdf files and share them with other users. However, you can't open .pdf files in Lightbox or add them to the cart.

- **Microsites:** These are collections of html and supporting files, saved in a .zip compressed file type. For more information about this content type, see the topics, [Using Microsites in the Lightbox Content Library](#) and [Creating and Uploading a Microsite .Zip File: Procedure](#).
- **Image files:** The image file types .jpg and .png are supported for upload and sharing as distinct pieces of content.

See the related topics for more information.

#### Related Topics

- [Use Microsites in the Lightbox Content Library](#)
- [Available Actions for Different Content Types](#)

## Use Microsites in the Lightbox Content Library

You can use the Sales Lightbox content library to store and share microsite content. The content library supports multiple-page and single-page microsite content. You construct your microsite content in .zip file format. The .zip file contains the required .html and supporting files, such as images and cascading style sheets.

For a procedure about creating and uploading the microsite files, see [Create and Upload a Microsite .Zip File](#).

### About the .Zip File

You create the microsite file structure on your hard drive and then you use a .zip compression utility to compress the files for upload. Only .zip compression format is allowed. The microsite's main landing page can have its own domain name or subdomain name. Your .zip file structure determines whether Lightbox considers the microsite a single-page microsite or a multiple-page microsite.

- **Single-page microsite:** The .zip file contains no embedded .zip files and contains one .html (or .htm) file in the directory structure. The page also contains additional supporting image files, cascading style sheet (.css) files, or JavaScript (.js) files in a separate folder.
- **Multiple-page microsite:** The .zip file contains embedded .zip files that contain one .html (or .htm) file in the directory structure. The page also contains additional supporting image files, cascading style sheet (.css) files, or JavaScript (.js) files in a separate folder.

This topic contains examples of the supported folder construction for microsite .zip files.

The following rules apply to the .html files:

- For a single-page microsite, the .zip file must contain only one .html (or .htm) file at the top location in the folder. For multiple-page microsites, the embedded .zip files serve as independent microsite pages. That is, each embedded .zip file must contain all of the elements that a single-page microsite contains, including the .html file.
- The .html file must be named identically to the .zip file. For example, `visionservers.zip` must contain a file named `visionservers.html` (or .htm) at the top location in the folder.
- If a properly-named, full-sized thumbnail image is provided in the .zip file, the application uses it as the thumbnail. See the rules on image files following this text for more information.

The following rules apply to the image files:

- Supported image file types are .png and .jpg.

- To designate a thumbnail image in the microsite, include the image file at the same location as the .html file, and append `-full` to the file name. For example, in the `visionservers.zip` file, include an image file named `visionservers-full.jpg`.
- If no image is designated as the thumbnail, then Lightbox displays its default thumbnail image.

You can enable keyword search for microsities by including a text file with the keywords. See the section on enabling keyword search for microsities later in this topic.

## Name and Structure Microsite Files

For microsities to be accepted for upload into the content library, you must follow some rules for naming and structuring the files. Each page must contain a folder of the same name, and that folder must contain an .html file of the same name. Thus, `visionservers.zip` must contain a folder, `visionservers`. In that folder there must be a file, `visionservers.html`. It can contain any number of other files and folders, but it must at least contain that file.

For a single-page microsite, you supply the .zip file that contains an .html file named the same as the .zip file. Optionally, you also supply a thumbnail image, a text file for keyword search, and supporting files, such as a cascading style sheet and JavaScript files.

The following figure shows an example of a well-constructed single-page microsite folder structure called `visionservers`.

```
/visionservers.zip
 /visionservers/
  visionservers.html
  visionservers-full.jpg
  visionservers-Searchdata.txt
 /css
 /fonts
 /img
 /js
```

For multiple-page microsities, you construct the .zip file as multiple .zip files within a parent .zip file.

The following figure shows an example of a well-constructed multiple-page microsite folder structure called `visionservers`.

```
visionservers.zip
/visionservers1.zip
  /visionservers1/
    visionservers1.html
    visionservers1-full.jpg
    visionservers1-Searchdata.txt
  /css
  /fonts
  /img
  /js
/visionservers2.zip
  /visionservers2/
    visionservers2.html
    visionservers2-full.jpg
    visionservers2-Searchdata.txt
  /css
  /fonts
  /img
  /js
/visionservers3.zip
  /visionservers3/
    visionservers3.html
    visionservers3-Searchdata.txt
  /css
  /fonts
  /img
  /js
```

## Enable Keyword Search for Microsites

You can add the ability for users to search for microsite files by keywords. Add a text file with the keywords to the microsite .zip file and name the file appropriately. If keyword search isn't enabled, then the main .html file is scrubbed of HTML tags and stored as searchable content. Use the following guidance when creating the text file:

- Use a text editor application, such as Microsoft Notepad, to create the text file.
- Name the text file with the same name as the .zip and .html files and append it with `-Searchdata` (note the file name is case-sensitive). For example, name it `visionservers-Searchdata.txt`.
- Include the text (.txt) file in the same location as its corresponding .html file.
- Enter the keywords with only spaces between them.
- Don't use punctuation marks, such as commas or periods, in the text file.

### Related Topics

- [Create and Upload a Microsite .Zip File](#)



## Create and Upload a Microsite .Zip File

After you have created your files and file structure for the microsite, you then must create a .zip file containing the folders and files in the correct structure.

Here are the high-level steps to create and upload microsite .zip files to the content library. For more details about how to structure the folders for the .zip file, see the topic, [Use Microsites in the Lightbox Content Library](#).

1. Create and store the .html and supporting files in a location on your computer. When creating the folder structure, you can use the examples in the topic, [Using Microsites in the Lightbox Content Library](#).
2. Use a file compression application to add the files to a .zip file.
3. Sign in to the applications and navigate to **Sales > Lightbox**.  
The Lightbox page appears, showing content that's available to you.
4. In the **My Content** view, click **Upload**.  
The Upload Content dialog window appears.
5. Browse for the .zip file on your computer.
6. Click **Open**.
7. Click **Upload** in the Upload Content dialog window.  
A confirmation message lets you know of a successful upload.

### Related Topics

- [Use Microsites in the Lightbox Content Library](#)

## Upload Content

### Use the Cart

The cart lets you assemble content and download it. You can view the details of the content while it's in the cart.

Select the content and remove it using the drop-down button on the content, or clear the cart and remove all of the content.

You can only add one type of content at a time to the cart. If you try to add different types of content to the cart, you receive an error stating that the content type is different. For example, if you have uploaded a .pptx presentation and then try to add a PDF file, an error message appears. Clear out the cart and then add your other item type. To add content to a cart:

1. Click **Sales > Lightbox**.  
The Lightbox overview page appears.
2. Click the **plus symbol** on the content on the Lightbox overview page to add the content to the cart.
3. Click **Cart** to view the content.  
The Lightbox: Cart page appears.
4. Click the **drop-down button** on the content to remove or move the content.

5. Click **Clear Cart** to remove all the content from the cart.

## About Uploading Content

In the Sales Lightbox content library, you can upload content that you want to view later or share with other users.

For a procedure detailing how to upload content, see the topic, [Uploading Lightbox Content: Procedure](#).

When you upload content, the application performs in the following way:

- If the content uploads successfully, then a thumbnail image appears on the My Content view after you refresh your view. After an initial upload, a placeholder thumbnail appears and postupload processing continues. You can continue to work during this time.
- An error message appears if uploaded file isn't a supported file type.
- After the initial file upload, postupload processing extracts thumbnails, performs a virus check on the uploaded file, and so on. A confirmation message appears if the content has successfully uploaded. When the upload is complete, refresh your view to see the content thumbnail image and to access the content.
- If postupload processing fails, and if a preferred notification method has been configured for you, then you receive a message explaining that an error occurred. If this error occurs, contact your administrator. Any content that fails the postupload process is removed from the My Content view.
- If you sign out during an upload, then postupload processing continues.

**Note:** The maximum file size of a content that can be uploaded is 100 MB.

### Related Topics

- [Upload Content](#)
- [About Updating Content](#)
- [Update Content](#)

## Upload Content

In the Sales Lightbox content library, you can upload content that you want to share with other users. You also can share content with a potential sales opportunity or with an account.

Here's how you can upload new content.

1. Navigate to **Sales > Lightbox**.  
The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.
2. In the **My Content** view, click **Upload**.  
The Upload Content dialog window appears.
3. Click **Browse**. Browse for and select the content you want to upload from a location on your computer.
4. Click **Open** or double-click the file.
5. Click **Upload** in the Upload Content dialog window.

6. A confirmation message lets you know of a successful upload.
7. After the upload is complete, refresh your view to see the new thumbnail images for the content, and to access the content.

#### Related Topics

- [About Uploading Content](#)
- [About Updating Content](#)
- [Update Content](#)

## Update Content

### About Updating Content

In the Sales Lightbox content library, you can replace or overwrite existing content that you own. For example, you might have already shared content with other users, but you want to replace the original content with a version containing newer data.

For a procedure detailing how to update an existing content, see the topic, [Update Content](#)

When you update content, the application performs in this ways:

- During post-upload processing, the placeholder thumbnail images change, but the file name remains the same for the newer content. You can continue to work during this time.
- If you're updating content while another user wants to use the content, for example, to add the content to the cart or to share the content, the other user can do so safely, and the current version of the content is used.
- When you're updating content, any search results for that content display the previous version of the content.
- If you attempt to update content while another user is already updating or deleting the content as a joint owner, then you will receive a message that an update is in progress, and to try again later.
- While the update is in progress, the content properties panel is available and a dynamic circle image is overlaid on the thumbnail, providing visual feedback that a new upload is processing.
- While the update is in progress, other users can open the previous version of the content.
- If you decide to update content with content that has a different name than the original content, then the name of the original content is kept, and only the content slides are updated.

After you update content, the application performs in the following way:

- If the content is successfully updated, then the content displays as the first document in the list.
- If the content fails to update, then the existing version remains in place and you receive an e-mail notification confirming that the update failed.
- The cover thumbnail image for the new content is determined by the previously selected cover thumbnail image. For example, if slide number 5 was the previous cover thumbnail, then slide number 5 is also selected for the new content. If the slides are re-ordered, then a different cover thumbnail is displayed.
- If the number of slides in content is reduced, then the thumbnail for the first slide is the cover thumbnail. For example, if slide number 20 was selected as the cover thumbnail for the previous content, but the new content only contains 10 slides, then the thumbnail for the first slide is the cover thumbnail for the content.

- When the content is fully updated, the Version and Uploaded properties are updated accordingly.
- The contents remain shared and the ownership remains shared with other users.
- Each time you update a specific content, the content is listed at the start of the content list in the My Content view.

#### Related Topics

- [Update Content](#)
- [About Setting a Slide as a Cover Thumbnail](#)

## Update Content

In the Sales Lightbox content library, you can replace or overwrite existing content that you own. For example, you might have already shared content with other users, but you want to replace the original content with a version containing newer data.

Here's how you can update content.

1. Navigate to **Sales > Lightbox**.  
The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.
2. In the **My Content** view, locate the content you want to replace and update.
3. From the **Actions** menu, click **Update**.  
The Upload new version of Content dialog window appears.
4. Click **Browse**. Browse for and select the updated content from a location on your computer.
5. Click **Open** or double-click the file.
6. Click **Upload**.  
A confirmation message lets you know of a successful upload.
7. After the update is complete, refresh your view to see the new thumbnail images for the content, and to access the content.

#### Related Topics

- [About Updating Content](#)

## Search for Content

### Overview of Searching for Content

You can search for content by file name, owner, or keyword, in the sales Lightbox content library. The search finds content that you own or that's shared with you by other users. As soon as a file is uploaded and processed, it's available in the search results.

To know how to search Lightbox content, see [Search for Content](#).

When searching, remember:

- Searches aren't case-sensitive. For example, searching for **America** returns the same results as searching for **aMERICA**.
- The search returns partial word matches. For example, if you search for **mas**, the application finds files containing the words **Masquerade**, **Masculine**, **Mask**, and so on.
- You can use the percent sign (%) as a wildcard at the beginning of a string. For example, if you perform a search for **%ore**, the application returns all content containing **core**, **sore**, and so on.
- You can search for file names that contain special and accented characters such as ampersands.
- The order of keywords within the search string is irrelevant. All keywords must match, to match the search string text in file names and content. The Boolean AND operator is implicit. That's you don't enter the Boolean AND operator in your search string. The application automatically inserts it between each keyword (or between keywords and phrases) in the search string.
- From the search results, you can perform the allowed activities with the content. See the topic, Available Lightbox Actions for Different Content Types, for more information about the allowed actions.

*Related Topics*

- [Search for Content](#)

## Search for Content

You can search for content by file name, owner, or keyword, in the sales Lightbox content library. The search finds content that you own or that's shared with you by other users.

For more information about the Lightbox search actions and tips, see [Overview of Searching for Content](#).

Here's how to search for content containing a specific word or text.

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content available to you.

2. In My Content or Shared Content views, click the magnifying glass icon.
3. Enter the text that you want to find in the search field, and press **Enter** or click the search icon.
4. Use the **Actions** menu to download the content or add it to your cart (if applicable). To open the content (if allowed), click the content name.

See the topic, Available Lightbox Actions for Different Content Types, for more information about the allowed actions.

Search results remain available until you perform a new search in your current session.

*Related Topics*

- [Overview of Searching for Content](#)

# Download and Open Content

## Download Content

Using the Sales Lightbox content library, you can download content that's shared with you. You also can download .pptx slides that you added to your cart.

You can download content from these locations in Sales Lightbox:

- The Shared Content view
- The My Content view
- The cart

**Note:** Only .pptx slides can be added to the cart; therefore, this is the only content type you can download from the cart.

Here's how you can download content from the Lightbox page. To filter the view of the content, you use the Shared Content and My Content view filters.

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that's available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. In the **My Content** or **Shared Content** views, click the **Actions** menu on a content item and select **Download**.

3. Do one of these actions:

- In the open file window, click **Save** to save the content to your computer's local drive.
- In the open file window, click **Open** to open the content and then save the content to your computer's local drive.

## Download Slides from the Cart

This procedure applies only to .pptx slides. Other content types can't be added to or downloaded from the cart. Use this procedure to assemble all slides in your cart into a single slide deck and download them to your computer's local drive.

**Note:** Slides must first be added to the cart in order for you to be able to download them from the cart. See the topic, Overview of Managing Your Cart, for more information.

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that's available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. Click **Cart** to open the cart.

3. Click the **Download** button.

4. Do one of these actions:

- In the open file window, click **Save** to save the content to your computer's local drive.

- In the open file window, click **Open** to open the content in Microsoft PowerPoint and then save the content to your computer's local drive.

After you save the content, the download property for each slide is updated. The slides remain in the cart until you remove them.

#### Related Topics

- [Overview of Managing Your Cart](#)
- [Overview of Sales Lightbox](#)

## Open Content

In the Sales Lightbox content library, you can open your own content and content that has been shared with you.

Opening content lets you:

- View the thumbnail images of PowerPoint slides (if available) in a dialog box.
- View thumbnail images of multiple-page microsites (if images have been provided) in a dialog box.
- Set a particular slide as the content's cover thumbnail image (for slide presentations and microsites).
- Add individual slides from slide presentations to your cart.
- View content properties, such as the number of times the content was downloaded or shared.

**Note:** Note that you can't open .pdf files from the library. When you click on the link for a .pdf file, you see thumbnails of each page.

Here's how you can open content.

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that is available to you.

2. In the **My Content** or **Shared Content** views, find the content you want to open.

You can also locate content by performing a search. Files are listed in the chronological order in which they were uploaded.

3. To open content, do one of the following:
  - Click the **Actions** menu and select **Open**.
  - Click the file name link under each thumbnail.
  - From search results, click the content name.

#### Related Topics

- [Search for Content](#)
- [About Setting a Slide as a Cover Thumbnail](#)

## Overview of Managing Your Cart

You can use the cart in the Sales Lightbox content library to add and assemble Microsoft PowerPoint (.pptx) slides that are available to you. Other content types, including .pdfs, microsites, and image files, can't be added to the cart.

The following are the tasks for the Lightbox cart:

- Adding a presentation to the cart
- Adding a slide to the cart
- Removing slides from the cart
- Emptying the cart
- Downloading slides from the cart
- Arranging the slide order in the cart

**Tip:** The current number of slides you have in your cart is always indicated on the Cart button. And the number of slides in a presentation is shown next to the Add to Cart action.

### Add All Slides in a Presentation to the Cart

To add all the slides of a presentation to the cart, do the following:

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. In the **My Content** or **Shared Content** views, locate the presentation you want to add to the cart.

3. Do one of the following:

- Click the **plus sign (+)** icon located at the top center of the thumbnail to add the presentation to the cart.
- Click the **Actions** menu and select **Add to Cart**.

A confirmation message notifies you of a successful addition to the cart.

### Add a Single Slide to the Cart

To add a single slide to the cart, do the following:

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. In the **My Content** or **Shared Content** views, open the presentation that contains the slide you want to add to the cart. Open the presentation by clicking the **Actions** icon and then clicking **Open**.

3. To add a single slide of the presentation to the cart, do one of the following:

- Click the **plus sign (+)** icon located at the top center of the slide that you want to add to the cart.
- Click the **Actions** menu and select **Add to Cart**.



A confirmation message notifies you of a successful addition to the cart.

4. Click **Done** to return to the **My Content** or **Shared Content** views.

**Note:** If a slide in your cart has its corresponding presentation deleted, then the slide remains in the cart, but the slide properties are unavailable.

## Remove Slides from the Cart

To remove a slide from the cart, do the following:

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. Click **Cart** and find the slide you want to remove.
3. Do one of the following:
  - o Click the **minus sign (-)** icon located at the top center of the slide that you want to remove from the cart.
  - o Click the **Actions** menu and select **Remove**.
4. Click **Yes** on the confirmation message.
5. Click **Done** to return to the **My Content** or **Shared Content** views.

## Empty the Cart

To empty the cart:

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. Click **Cart** to view your cart.
3. Click **Clear Cart**.

## Download from the Cart

To download all slides from the cart into a single presentation and save them to your computer's local drive, do the following:

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. Click **Cart** to open the cart.
3. Click **Download**.
4. Do one of the following:
  - o In the open file window, click **Save** to save the presentation to your computer's local drive.
  - o In the open file window, click **Open** to open the presentation in Microsoft PowerPoint and then save the presentation to your computer's local drive.

After you save the presentation, the application updates the properties information for the slide. The slides remain in the cart until you remove them.

5. Click **Done** to return to the **My Content** or **Shared Content** views.

## Arrange the Slide Order in the Cart

To change the order in which slides appear in the cart, do the following:

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that is available to you. Each item is represented by a thumbnail image. The image has icons on it that allow access to actions and information.

2. Click **Cart** to open the cart.
3. In the cart, find the slide you want to move.
4. Do one of the following:
  - o Move the slides to where you want them.
  - o Click the **Actions** menu and select **Move Left** or **Move Right**.
  - o Click the left or right arrow located at the top center of the thumbnail.
5. Click **Done** to return to the **My Content** or **Shared Content** views.

### Related Topics

- [Download Content](#)
- [Open Content](#)
- [Overview of Searching for Content](#)

## Share Content

### Overview of Sharing Content

In the Sales Lightbox content library, you can share content with:

- Opportunities
- Accounts
- Users

You can also select a user to be the joint owner of a content item along with you.

### Share Content with Opportunities and Accounts

You can share your content with accounts and opportunities. When you share content with an opportunity or an account, you're essentially attaching a copy of the content to the opportunity or account you select. Note the following:

- You can only share content with an account or an opportunity if you have access to Sales accounts or opportunities applications.
- If you make any changes to the content after you share it with an opportunity, the shared document isn't affected.

## Share Content with Other Users

You can share content with another user without granting joint ownership. The following table indicates which actions the other user can perform after the content is shared. All content that's shared without joint ownership is available in the user's Shared Content view.

Actions	User Permission?
View content	Yes
Download content	Yes
Share content without joint ownership	Yes
Update content	No
Share content with joint ownership	No
Delete content	No

## Share Content with a User as the Joint Owner

If you own a content item, you can share it with a user and grant joint ownership to that user. The following table indicates which actions the other user can perform when the content is shared with joint ownership. All content that's shared with joint ownership is available in the user's My Content view.

Actions	User Permission?
View content	Yes
Download content	Yes
Update content	Yes
Share content with ownership	Yes
Share content without ownership	Yes
Delete content	Yes

For procedures details sharing activities, see the additional topics on sharing content.

### Related Topics

- [Share Content with an Account](#)
- [Share Content with an Opportunity](#)
- [Share Content with a User](#)
- [Share Content as Joint Owner](#)

## Share Content with an Opportunity

In the Sales Lightbox content library, you can attach a copy of a content to an opportunity. If you make any changes to the content after you share it with an opportunity, the shared document isn't affected.

You can only share content with an opportunity if you have permission to access the opportunities application.

Here's how to share content with an opportunity.

1. Navigate to **Sales > Lightbox**.  
The Lightbox page appears, showing content that is available to you.
2. In the **My Content** or **Shared Content** views, click the **Actions** menu and select **Share Content with Opportunity**.  
The search and select page for opportunities appears.
3. Search for and select the opportunity.
4. Click **OK**.

A confirmation message lets you know that the content was successfully shared.

### Related Topics

- [Overview of Sharing Content](#)
- [Share Content with a User](#)
- [Share Content as Joint Owner](#)
- [Share Content with an Account](#)

## Share Content with a User

In the Sales Lightbox content library, you can share your content with others using sales applications. After you share content with another user, the content appears in the user's Shared Content view.

If you make any changes to the content after you share it with a user, these changes are visible to all users with whom the document has been shared. You can only share content with a user who has access to Sales Lightbox, and if the content owner has granted you joint ownership.

Here's how to share content with a user.

1. Navigate to **Sales > Lightbox**.  
The Lightbox page appears, showing content that is available to you.
2. In the **My Content** or **Shared Content** views, click the **Actions** menu and select **Share Content with User**.

The search and select page for users appears.

3. Search for and select the user.
4. Click **OK**.

A confirmation message lets you know the content was successfully shared.

#### *Related Topics*

- [Overview of Sharing Content](#)
- [Share Content with an Opportunity](#)
- [Share Content as Joint Owner](#)
- [Share Content with an Account](#)

## Share Content as Joint Owner

In the Sales Lightbox content library, you can share your content with other sales application users and make them joint owners of the content.

If you make any changes to the content after you share it with a user, these changes are visible to all owners with whom the document has been shared. When you share a document with a user with joint ownership, that user is allowed to update and delete that document. You can only share a content with a user as joint owner if the user has access to Sales Lightbox, and if the content owner has also granted you joint ownership.

Here's how to share content with a user as joint owner.

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that is available to you.

2. In the **My Content** or **Shared Content** views, click the **Actions** menu and select **Share Content with User as Joint Owner**.

The search and select page for users appears.

3. Search for and select the user.
4. Click **OK**.

A confirmation message lets you know the content was successfully shared.

#### *Related Topics*

- [Overview of Sharing Content](#)
- [Share Content with an Opportunity](#)
- [Share Content with a User](#)
- [Share Content with an Account](#)

## Share Content with an Account

In the Sales Lightbox content library, you can attach a copy of a content item to an account. If you make any changes to the content after you share it with an account, the shared document isn't affected.

You can only share content with an account if you have permission to access the sales accounts application. Here's how to share content with an account.

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing content that is available to you.

2. In the **My Content** or **Shared Content** views, click the **Actions** menu and select **Share Content with Customer**.

The search and select page for accounts opens.

3. Search for and select the account.

4. Click **OK**.

A confirmation message lets you know that the content was successfully shared.

#### *Related Topics*

- [Overview of Sharing Content](#)
- [Share Content with a User](#)
- [Share Content as Joint Owner](#)
- [Share Content with an Opportunity](#)

## Content with Thumbnail Images

### About Setting a Slide as a Cover Thumbnail

When using .pptx slide decks as content in the Oracle Sales Lightbox content library, you can set one slide in the slide presentation as the cover thumbnail image. These images help users identify the contents of items in the library.

For details on how to set a cover thumbnail image, see the topic, [Set a Slide as a Cover Thumbnail](#).

Before you set a slide as a cover thumbnail image, consider the following:

- If you don't set a cover thumbnail, then a default cover thumbnail is assigned. The default cover thumbnail is either the last slide used as a cover thumbnail or the first slide in the presentation.
- If you explicitly set a cover thumbnail for a presentation once, then the cover thumbnail remains the same unless you explicitly change it again.
- If you're the owner of the document and set the cover thumbnail, then the cover you set becomes the cover thumbnail for you and for all other users with whom this document is shared, who haven't explicitly set their own cover thumbnail.
- If you own a document jointly with other users, and you and a second user have changed the cover thumbnail from the default cover, then all other document owners who haven't set a new cover will see the most recently set thumbnail as the new cover.

#### *Related Topics*

- [Set a Slide as a Cover Thumbnail](#)

## Set a Slide as a Cover Thumbnail

When using .pptx slide decks as content in the Oracle Sales Lightbox content library, you can set one slide in the slide presentation as the cover thumbnail image. These images help users identify the contents of items in the library.

Here's how you can set a slide that you want to display as the cover thumbnail image for a presentation.

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing presentations that are available to you.

2. In the **My Content** view, open the presentation.

3. Click the star icon on the target slide to set the slide as the cover thumbnail.

When a slide is set as the cover thumbnail, the star icon on it changes to a filled gray star.

### Related Topics

- [About Setting a Slide as a Cover Thumbnail](#)

## Delete Content

### Overview of Deleting Content

In the Sales Lightbox content library, you can delete content that you own. When you delete content, it's no longer available to you or to others.

For a procedure detailing how to delete content, see the topic, [Delete Content](#)

If, before deleting a content item, you shared the content item with other users who are currently working with the content you deleted, one of the following scenarios might occur:

- If you're browsing through content library that includes deleted content, the deleted content isn't available when the page is refreshed.
- If you're browsing through content that has been deleted since you started browsing, when you scroll to the next set of content, a warning message indicates that the content has been deleted. You're then returned to the view prior to opening the content, for example, the Shared Content view.
- If you're browsing through a content that has been deleted since you started browsing, and if you click Show Content Properties or another menu option, then a warning message indicates that the content has been deleted. You're then returned to the view that was active prior to opening the file, for example, the Shared Content view.
- In the case of slide decks, if you have already added slides from a deleted content to the cart, the thumbnail images of the slides remain visible and available for you to view and to download from the cart until they're manually removed from the cart, or until the cart is cleared. However, the slide properties are unavailable for the deleted slides.
- If you try to directly download a deleted content from the Actions menu or from one of the views, a warning message indicates that the content has been deleted and the content isn't downloaded.

- If a deleted content item is displayed in search results and you attempt to select or open that content, then a warning message indicates that the content has been deleted. You can't interact further with the search result item.

**Note:** If you're a sales administrator or a setup user, you can delete any content from the **All Content** view. This view is available only to sales administrators and setup users.

#### Related Topics

- [Delete Content](#)

## Delete Content

In the Sales Lightbox content library, you can delete content that you own. When you delete content, it's no longer available to you or to others.

Here's how you can delete content

1. Navigate to **Sales > Lightbox**.

The Lightbox page appears, showing contents that are available to you.

2. In the **My Content** view, locate the content you want to delete.
3. Click the **Actions** menu and select **Delete** from the menu.
4. Click **Yes** to confirm the deletion.

#### Related Topics

- [Overview of Deleting Content](#)



# 29 In-Context Audit

## Overview of In-Context Audit

The in-context Audit feature lets you view the change history on a record, such as an opportunity, while you're viewing the record. You can view the history for the object without checking the fundamental audit reports separately.

You can view who made the changes, what were the changes, and when the changes were made in the change history subtab.

This feature helps to:

- Reduce time to resolve an issue
- Understand the audit history
- Improve compliance
- Track the change history of a particular object record.

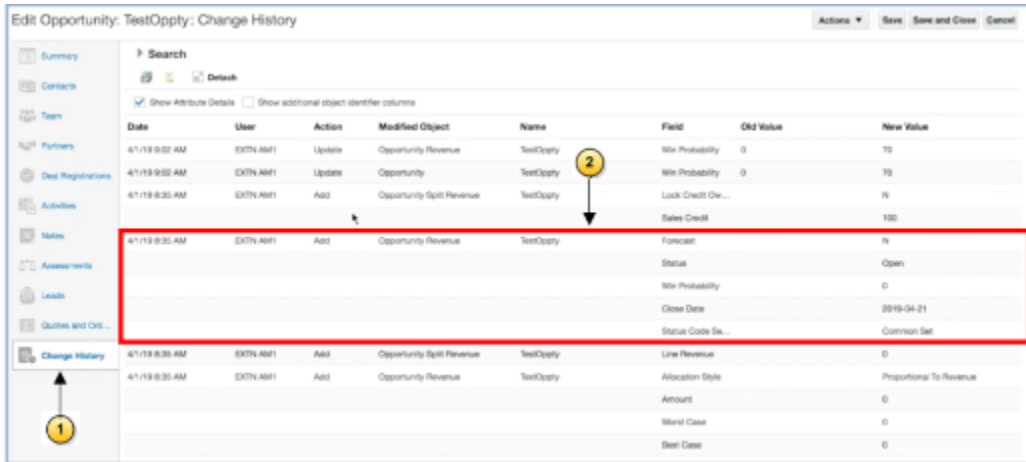
## Use the Change History Subtab

Use this topic to understand how you can use the Change History subtab to view who made changes to a record and when they made the changes.

**Note:** Every business object has a separate privilege for viewing the Change History subtab. The subtab is visible only if your administrator has given the necessary privileges to you or to your role.

## View History

Click the Change History subtab on the object's details page, as shown in callout 1. By default, you can see the records of the last 30 days for that record. You can view all the changes in one transaction per object grouped together, as shown in callout 2.



## Search Fields in the Change History Subtab

Use the fields within Search in the Change History page and define your search.

Field Name	Description
Date	Specify the audit history date range.
User	Filter the records based on a particular user.
Action	Filter the records based on the action done, for example: Add, Update, Delete.
Modified Object	Specify whether you want to see the records for the parent object, related or child objects or both.
Name	Specify the name of the object that you want to search.
Field	Select one or more fields on the object and filter the records to see the changes made only for those fields.
Old Value/New Values	Search with the old or new value of a field.

For example, you search only the header opportunity object and within that, you want to view only the changes on Win Probability. Then do these actions as shown in the image.

- Select Opportunity in Modified Object, as shown in callout 1.
- Select Win Probability in Field as shown in callout 2.
- Search. The filtered records display, as shown in callout 3.

Edit Opportunity: TestOppty: Change History

Search filters: Date (Last 30 Days), User (Equity), Action (Equity), Modified Object (Equity Opportunity), Name (Starts with), Field (Equity Win Probability), Old Value (Starts with), New Value (Starts with). Includes Search and Reset buttons.

Table with columns: Date, User, Action, Modified Object, Name, Field, Old Value, New Value.

Date	User	Action	Modified Object	Name	Field	Old Value	New Value
4/1/19 8:02 AM	EXTN AM1	Update	Opportunity	TestOppty	Win Probability	0	70
4/1/19 8:35 AM	EXTN AM1	Act	Opportunity	TestOppty	Win Probability		0

