Oracle Fusion Cloud Sales Automation

How do I get started with Orchestration?

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Chapter 1
About the Orchestration Playbook

1 About the Orchestration Playbook

How to Use This Playbook

Use this playbook to get started with the Orchestration feature in Oracle Fusion Sales in the Redwood user experience. You learn how to enable the Orchestration feature and how to create orchestrations, the best practice processes that guide salespeople through different sales situations for qualifying leads and closing deals using opportunities.

Prerequisite Setup

This playbook assumes that you've set up the main features of Oracle Fusion Sales in the Redwood user experience. These main features include users, accounts and contacts, leads, opportunities, sales catalog, sales territories, email and telephony integration, and so on.

How the Orchestration Playbook Is Organized

The playbook contains the following sections:

- **Enable the Orchestration Feature**:

  Explains how to turn on the feature by setting a profile option and how to enable activity configurations. The second setup isn't required for customers that are new to Oracle Fusion Sales in the Redwood user experience.

- **Email Templates**:

  Explains how to set up the email templates that salespeople can use to send outbound emails.

- **How Orchestration Works**:

  Provides an overview of key concepts.

- **Create Orchestrations**:

  Details how you create, test, activate, and manage orchestrations. For a summary and check list of the setup steps, see the topic: *Overview of the Steps to Create Orchestrations*. The section also includes a step-by-step worked example of an orchestration for qualifying leads that you can use as a starting point: *Leads Orchestration Example*.

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Enable the Orchestartion Feature

2 Enable the Orchestartion Feature

Enable the Orchestration Feature

You must enable the orchestration feature by setting the profile option Enable Orchestration (ORA_ZCA_ENABLE_ORCHESTRATION) to Yes at the site, lead, and opportunity management levels.

1. Open the **Manage Administrator Profile Values** task from the Setup and Maintenance work area:

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

2. On the Manage Administrator Profile Values page, search for the profile option by entering `Enable Orchestration` in the **Profile Display Name**.
3. Select **Yes** as the **Profile Value** for Site, Lead Management, and Opportunity Management.
4. Click **Save and Close**.

Enable Opportunity and Lead Activity Configurations for Orchestration

You must make sure that certain attributes are enabled in the active Activities Configuration to work with Orchestration.

If you're new to Sales in the Redwood user experience in this release and you created and activated activities configurations no action is required. If you're already using Activities (the Activity Stream), then you must enable the attributes. You can do so either by duplicating and activating the latest activities configuration or by editing your existing active configuration.

How to Enable Orchestration If You Haven't Created Custom Activity Configurations

If you started using Sales in the Redwood user experience in previous releases, and you haven't created your own activity configurations for sales leads and opportunities, then you can simply duplicate and activate the current activity configurations provided by Oracle for these 2 sales objects: Sales Lead and Opportunity.

1. Click **Navigator** > **Configuration** > **Configure Activities Display**.
2. Select a sales object you want to configure.
3. In the **Activities configurations** section, select an existing configuration. Oracle provides one standard configuration for each object. Look for SEED_DATA_FROM_APPLICATION in the **Created By** column.
4. In the Action column (the last column on the right), click **Actions** (three dots) and select **Duplicate**.
5. In the Duplicate dialog, enter a name for your configuration and an optional description.
6. Click **Duplicate**.
7. Click on the new configuration name to display its attribute setup.

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8. If you want to use the configuration provided by Oracle, then skip steps 9 through 11 and activate the configuration as described in step 12.
9. If you want to change the way attributes display first, then click **Actions** and select **Edit**.
10. Configure the attributes:
    a. Select one of the objects you want to configure for display on the left pane.
    b. In the right pane, locate the attribute you want to update and set the two parameters:
        - **Make Available for Display**: makes a field available for display on the UI.
        - **Monitor for Changes**: monitors the field for updates.
11. When you're done, click **Update**.
12. To make your configuration active, click **Actions** (the three dots) and select **Activate**. You must then confirm that you want to activate.

What to Do If You've Created Custom Activity Configurations

If you've created custom activity configurations for sales leads and opportunities, then you must edit your active configurations for both objects and enable options for attributes related to Orchestration. The settings for both Sales Lead and Opportunity objects are identical.

1. Click **Navigator** > **Configuration** > **Configure Activities Display**.
2. From the **What object do you want to configure?** list, select either Sales Lead or Opportunity.
3. In the **Activities configurations** section, select your custom active configuration.
4. In the Action column (the last column on the right), click **Actions** (three dots) and select **Edit**.
5. In the **Objects you can configure for display** pane, click the **Activity/Task** object.
6. In the right pane **Objects attributes for display** search box, enter **Orchestration**.
7. For the **Orchestration ID** and the **Orchestration Step ID** attributes, select the **Make Available for Display** check box. Don't select the **Monitor for Changes** check box. Here's a recap:

Display Name	Unique Name	Make Available for Display	Monitor for Changes
Orchestration ID	OrchestrationId	Selected	Not Selected
Orchestration Step ID	OrchestrationStepId	Selected	Not Selected

8. In the right pane **Objects attributes for display** search box, enter **SmartAct**.
9. For the **Smart Action** and **Smart Action ID** attributes, set the **Make Available for Display** and **Monitor for Changes** check boxes as follows:

Display Name	Unique Name	Make Available for Display	Monitor for Changes
Smart Action Context	SmartActionContext	Selected	Selected
Smart Action ID	SmartActionId	Selected	Not Selected

10. In the right pane **Objects attributes for display** search box, enter **Appointment**.
11. For the **Appointment Status** attribute select both the **Make Available for Display** and **Monitor for Changes** check boxes:

Display Name	Unique Name	Make Available for Display	Monitor for Changes
Appointment Status	AppointmentStatus	Selected	Selected

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12. Click **Update** to save your changes.
13. Now edit your active configuration for the other object, Sales Lead or Opportunity, following the same procedure.

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Chapter 3
Email Templates

3 Email Templates

Create Email Templates

You can create email templates that can be used both by salespeople and by automated processes in orchestrations. You create the templates for a specific object and can include attributes from that object as mail merge fields. Salespeople who are using the template to send emails to customers can modify the text, and add their signatures and attachments.

Before you start

If you want to send HTML emails with images, then you must author the HTML ahead of time and copy it into the template. Any images must be referenced by URLs. Salespeople reviewing the emails before sending them don't see the HTML code.

Here's what to do

1. Sign in as an administrator.
2. Ensure that you're in an active sandbox.
3. Navigate to Application Composer.
4. Click **Message Templates**.

   > **Note:** Don't click Email Templates by a mistake. That's a different feature entirely.

5. On the Manage Message Templates page, select **+ Create** from the Actions drop-down list.
6. Give the template a name and description. Salespeople see the name when they select the template.
7. Select the object. A template can be used only for sending emails for the object. For example, salespeople who email a customer from a leads record only see the active leads email templates.
8. If you don't want to make the template available for use while you're drafting it, switch the **Active** switch off. Templates are active by default.
9. Enter the subject and message content.

   Use the Attributes list to insert the mail-merge fields.

   > **Tip:** If the meaning of the attribute isn't intuitive, click the attribute to add it as a merge field to see its technical name. Some of the attributes in the list have the same name. For example, for Opportunities, there are two attributes with the name "Account". The technical name for the first is TargetPartyId. The second is TargetPartyName.

10. Click **Save**.

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4 How Orchestration Works

Guide Salespeople Through Best Practices Using Orchestration

Use the Orchestration feature to create orchestrations that guide salespeople through best sales practices for different sales situations. In the current release, you can provide recommended steps for sales lead qualification and for closing deals in opportunities.

For leads, you specify the different steps required to take an unqualified lead to different statuses: to qualified, to converted, and to retired. The orchestration is divided into orchestration stages, one for each status.

For opportunities, you create the orchestration to guide salespeople through the different sales stages of a sales method. Each opportunity must be associated with a sales method, a separate feature that you must set up as a prerequisite. The sales stages provide the structure for the orchestration. In the orchestration setup UI, the sales stages are called orchestration stages.

For each orchestration stage, you specify what information the salesperson needs to provide and what actions they need to take to move the opportunity to the next stage. You can also provide automated steps that take actions behind the scenes and follow up when things don't go as planned. For example, you can automatically send a follow-up email if a customer doesn't respond when a salesperson contacts them.

The orchestration steps recommend actions to complete a set of goals that you define. You can specify if a step is required or not. For example, you can allow salespeople to mark a step as "completed" or allow them to click "skip" to move to the next step.

Although experienced salespeople can skip the recommended steps or mark them as complete, you shouldn't think of an orchestration as a check list because the orchestration can suggest a whole slew of remedial steps. Orchestrations represent the best practices to achieve specific goals such as contacting customers and closing the deal.

Past guided sales processes, such as Sales Coach, provided only a single set of linear recommendations. Orchestrations, by contrast, can have multiple branches to suggest different actions when a particular step in the sales process does or doesn't succeed. For example, you can prompt the salesperson to call the customer with the click of a button. If the salesperson reaches the customer, the process guides them to set up an appointment to discuss the sales proposal. If the salesperson can't contact the customer, the orchestration waits for a day, and then prompts the salesperson to make a follow-up call. Orchestration also improves on previous guided processes by supporting Smart Actions, an extensible framework for creating actions. For more information, see *Overview of Smart Actions*.

Related Topics

- Orchestration Stages
- Manual and Automatic Steps
- Orchestration Objectives
- Types of Orchestration Steps
- Orchestration Validations and Minimum Requirements

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How Salespeople Interact with Orchestrations

Orchestration steps that require salespeople to take action are displayed on the Guidance panel in opportunity and lead overviews. The panel gets displayed only if there's an active orchestration running on that particular lead or opportunity record. In addition, the orchestration creates tasks and appointments to go along with the steps. If you add a step of type task to create a demo, for example, then the orchestration displays the suggested action in the Guidance panel and also creates an accompanying task, which appears in the list of activities for the record.

Recommended Steps Displayed in the Guidance Panel

Each orchestration step that requires a salesperson to take an action, appears at the top of the Guidance panel.

This screenshot of an opportunity overview describes key features of the Guidance panel.

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Callout Number	Description
1	Recommended step. Salespeople see both the title you enter in the Subject field and the description that you enter in the Description field when editing task and appointment properties. These fields get automatically populated with the text you enter when adding the step itself, but you can edit it.
2	Salespeople can open any attachments and sales guides you add to the step. They can click View Attachments or download the attachments as a file for reference. The link can be viewed in a new browser tab.
3	Steps with smart actions display a button with two options. You can use the button to start the action or you can manually mark the action is completed by selecting the **Complete** option. Smart actions can take automatic actions, such as opening windows, starting a Zoom call, and displaying information for salespeople to act on. For steps that don't use smart actions, **Complete** is the only action. The action closes the task and also marks any objective linked to the step as complete.
4	When allowed, salespeople can also click **Skip** to move on to the next success step. In this case, the step is marked as not completed. Salespeople can return and finish the step later, or they can mark it as complete.
5	Manual steps automatically create a task or an appointment in Activities. Actions the salesperson takes on the step are recorded as well. **Note:** When salespeople take an action to run a task or mark a step as Complete, the Orchestration runtime UI displays an **Analyzing your next step** processing state message while trying to find the next step of the orchestration.
6	The Stage Objectives lists the objectives for the opportunity stage.
7	Clicking the **View All Objectives** link opens a panel that lists the objectives for the whole orchestration.

Accessing Tasks from Activities List and Sales Dashboard

Salespeople can also act on the recommended tasks and appointments from the Sales Dashboard, from the Activities work area, and from the list of Activities (the activity stream) in the records themselves.

Clicking on an overdue task name link in the Sales Dashboard, for example, brings salespeople to the record overview where they see the Guidance panel and the recommended step that's overdue.

Steps That Aren't Completed

If a salesperson doesn't complete the task or appointment by the due date plus any grace period you specify, and doesn't reschedule the activity, then the orchestration considers the step as failed and displays any remedial "next step on failure" you provide. The orchestration sets any tasks not completed on time to the Canceled status.

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If you don't provide a step on failure, then the orchestration marks any associated objective as failed and waits. When the salesperson finally takes action the orchestration restarts again. The action could be completing the task, rescheduling it, or clicking Skip or Complete.

Orchestration Stages

Orchestrations are divided into stages. For opportunities, the orchestration stages are equivalent to the sales stages in the sales method you selected. For leads, the orchestration stages are the different lead statuses.

Manual and Automatic Steps

There are two types of orchestration steps: manual and automatic.

- Manual steps ask the salesperson to take an action: to either complete a task or appointment. Manual steps are composed of two components: the task or appointment itself and an action.

    When the orchestration displays a manual step in the guidance panel, it automatically creates the task or appointment using the information you provide during setup. During setup, you can add all the information the salesperson might need to carry out the step, that includes attachments. An appointment step tentatively schedules the appointment that the salesperson must reschedule.

    If you specify a smart action as the action for the manual step, then, with a click of a button, a salesperson can start a web conference or a call, open an email compose window with a mail-merged draft ready to edit, or display a panel with fields they must update, for example.

- Automatic steps act in the background without salesperson involvement. Automatic steps include:

    o The Next Stage step that moves the salesperson to a different orchestration stage. This step isn't visible to salespeople.

    o The Wait step that pauses the process for a set amount of time.

    o The Field Update step that automatically updates field values.

    o The Email Automation step that sends mail-merged emails from templates without salesperson involvement.

    o The Stop step stops the orchestration. You can decide to allow the record to be picked up by another orchestration when it stops.

- **Note:** Administrators can now configure explicit conditions to run automated Field Update steps. This allows salespeople to receive guidance at specific stages of their sales process, along with a prioritized set of tasks and objectives to move the deal forward.Adminstrators can also configure Wait steps that provide guidance to salespeople based on conditions set for a specific sales stage.

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Orchestration Objectives

You must create at least one business objective for each orchestration stage that includes steps to be carried out by salespeople. Any manual step in the orchestration stage can complete one or more of the objectives you list. You can map multiple steps to each objective. When salespeople complete all of the steps mapped to an objective, the objective is marked as complete with a check mark in the runtime UI.

Salespeople can display the list of objectives for all the orchestration stages from the Guidance panel in lead and opportunity overviews. Here's a screenshot of a list of objectives for a lead. In this example, there are 4 objectives for processing a lead in the Unqualified status: Contact Customer, Schedule Discovery, Discover Interest, Budget Decision Makers, and Time Frame, and Qualify the Lead.
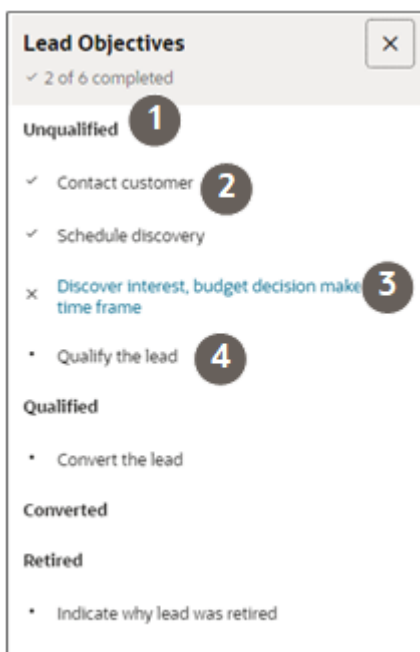
Salespeople can view the names of these objectives and the objectives for all the orchestration stages in the UI at runtime by clicking a link in the Suggestions panel in the lead overview.

Callout	Description
1	Lead orchestration stage name. For leads, each orchestration stage is equivalent to a lead status.
2	Objectives that are completed display a check mark in front of them.
3	Objectives that were skipped appear with an X. Salespeople can click the objective name link to view the steps that are mapped to the objective, and take action on them or mark them as Completed.
4	Objectives that haven't yet been attempted appear with a bullet point.

If you want to require salespeople to carry out multiple steps to complete an objective, then map all of those steps to the objective.

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Suppose, for example, that you have 3 steps related to the objective Engage Customer.

If you map the objective to all of the steps, then salespeople will have to complete all 3 steps before they see a check mark to indicate the objective is complete. If they skip any of the steps, the objective isn't completed and marked with an X. To complete the objective, salespeople click the name and click Complete for the skipped steps.
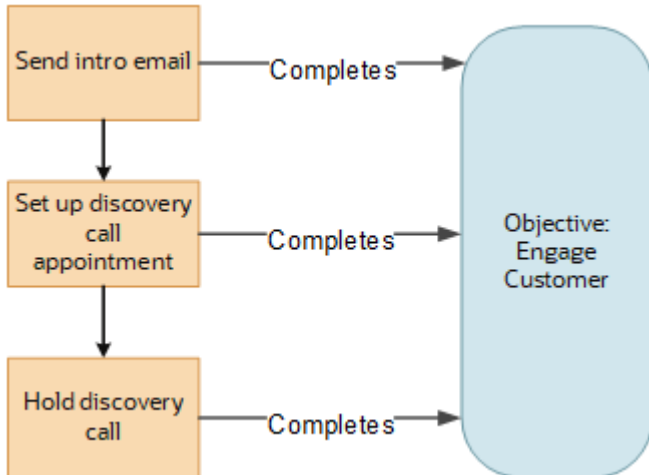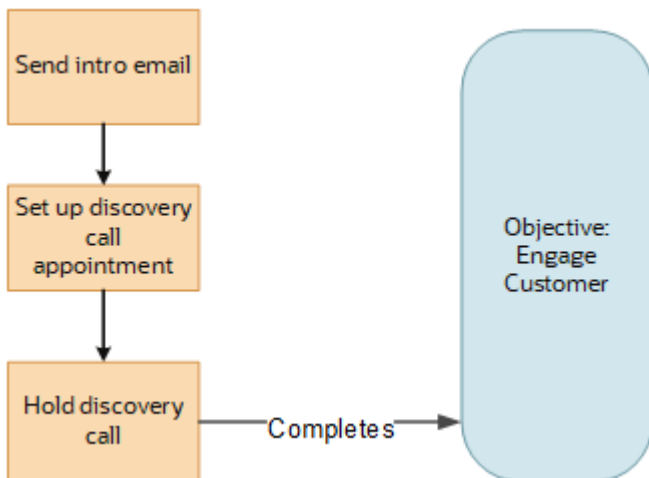

If you map just the last of the 3 steps to the objective, then salespeople need to complete only the last step for the objective to be complete. They can skip the first two steps and still see the check mark.

Salespeople can view which objectives have been completed at any time. If they skip steps and don't complete an objective, salespeople can go back and revisit the steps they have missed, and manually mark them as completed. All orchestration stages that include steps performed by salespeople require at least one objective. You don't create objectives for stages that only include automated steps because salespeople don't see any of these types of steps.

Types of Orchestration Steps

Here's a description of the different types of steps you can create for your orchestrations.

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Step Type	Description
Task	Tasks to be performed by salespeople. You can add a smart action to a task, such as Send Email, Call, and Show Contacts. In the runtime UI, task steps with smart actions display a button with the action name. Smart actions take automatic actions, such as opening windows and displaying information for salespeople to act on. For example, a task step with the Call smart action displays a Call button that salespeople can click to open the soft phone and start a call. All steps of type Task automatically create a task in the background. Salespeople can review the task and edit it in the Pending section on the Activities page, the list of all activities on the record. Salespeople also see the pending tasks on their Sales Dashboard and in the Activities work area. **Note:** Don't use the Task step type together with the Schedule Appointment smart action to schedule appointments. Doing so merely creates a task for the salesperson to create the appointment. The task is considered complete when the salesperson clicks on the Schedule Appointment button. It doesn't track the completion of the appointment itself.
Appointment	The Appointment type step lets salespeople schedule an appointment with the click of a button. During setup, you specify if the appointment will be a call or a web conference. And you suggest appointment details such as timing, length, and participants. You can also attach documents to be used in the appointment. When the step runs, an appointment gets automatically created in the background and tentatively scheduled using the time delay you enter in the step. For example, you can specify that the appointment be scheduled 24-hours after the step runs. The appointment gets automatically listed among the pending Activities for the record. Salespeople can also view appointments in the Activities work area and in the Sales Dashboard. Salespeople must edit the appointment and reschedule it to the actual time they want to hold the meeting. Just as with tasks, you can specify the success criteria that move the orchestration to the next step. You can deem the appointment a success if the salesperson selects the Positive Outcome resolution code during call wrap up, for example.
Wait	The Wait type step pauses the orchestration for the number of days you specify. This step type, like all automatic steps that don't require salespeople to take an action, doesn't show up in the UI.
Next Stage	The Next Stage step type moves the orchestration to another orchestration stage. You can add more than one Next Stage step to move to different stages, depending on the outcome of the previous stage. For example, you may want to move to a Close stage if the opportunity is won, but to a Lost stage if it's not. For opportunities, the sales method can require salespeople to enter specific information in a sales stage. If the required information is missing, the application will request the salesperson to enter it before advancing to the next stage. The Next Stage step, like all automatic steps, doesn't require salespeople to take an action. It doesn't show up in the UI.
Stop	The Stop step type indicates the end of a branch in the orchestration. For example, you can add a stop when you exhausted all attempts to contact a customer.
Automation	The Automation step type, takes the action that you specify in a Groovy script.

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Step Type	Description
Field Update	The Field Update type step lets you automatically update fields to desired values. For example, if the opportunity is closing on the deal, then you can automatically update the close date so that the opportunity appears in this quarter's sales forecast. **Note:** To have salespeople manually update specific opportunity field values, you can create a task with the Update Opportunity smart action as described in the topic *Step for Manual Opportunity Field Updates*.
Email Automation	The Email Automation step lets you send mail-merged emails from templates without salesperson involvement. You must create the templates ahead of time.

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Chapter 5
Create Orchestrations

5 Create Orchestrations

Overview of the Steps to Create Orchestrations

Here's an overview of the steps to create orchestrations that guide salespeople through best practices to qualify a lead or get an opportunity from qualification to sale.

Step	Description	Navigation	Where to Get More Details
1	Because an orchestration can have many objectives, steps, and branches, create a logical diagram of the process.	None.	See the topics: • *Guide Salespeople Through Best Practices Using Orchestration* • *Leads Orchestration Example*
2	If you're planning to create an orchestration for opportunities, then create or identify the appropriate sales method you're going to use. The sales method becomes the scaffolding for your orchestration. The sales stages in the sales method become the orchestration stages.	**Setup and Maintenance** > **Sales** > **Opportunities** > **Manage Sales Methods and Sales Stages**	See the topic: *Create Sales Methods and Stages*
3	Create the orchestration. Orchestrations for sales leads take salespeople through the different stages of the qualification process. There's one orchestration stage for each lead status. For opportunities, you specify the sales method and guide salespeople through orchestration stages that are equivalent to the sales stages of the sales method you selected. You can add conditions to the orchestration so it runs only on a specific set of records. For example, you can trigger different orchestrations depending on the account, partner, sales channel, asset, close date, competitor, and so on.	**Navigator** > **Configuration** > **Application Composer** > **Orchestration Setup** > **Create Orchestration**	See the topics: • *Orchestration Stages* • *Enter Basic Details for the Orchestration* • *Leads Orchestration Example*
4	For each orchestration stage with manual steps, create the objectives salespeople must accomplish to move to the next stage. Salespeople can view which objectives have been met as they work and can complete the tasks in any unmet objectives. The objectives themselves don't play any role in the logic of the orchestration. They're there merely to inform salespeople what objectives they've accomplished or skipped.	With the orchestration open, click a sales stage and select the **Objectives** tab.	See the topics: • *Orchestration Objectives* • *Create the List of Objectives* • *Leads Orchestration Example*

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Step	Description	Navigation	Where to Get More Details
5	Create the steps for each orchestration stage. You can create the steps either as a diagram or as a list. You create each step in two phases: 1. You add the step and select its type and an optional smart action. 2. You edit the step properties to enter the step details. What you enter depends on the step type you selected. Review the validations and minimum requirements. For example, you must add at least one Next Stage step to every stage to move the orchestration to the next orchestration stage. The orchestration doesn't move to the next stage on its own. And you must end all branches with a Stop step.	With the orchestration open, click an orchestration stage and select either **Diagram** or **Steps**.	See the topics: • *Manual and Automatic Steps* • *Types of Orchestration Steps* • *Two Ways of Creating Orchestration Steps* • *Create Orchestration Steps as a Diagram* • *Create the Orchestration Steps on the Steps Tab* • *Orchestration Validations and Minimum Requirements* • *Leads Orchestration Example*
6	Get ready to test your orchestration. Before each test, you must create up to 3 records that you'll use for testing. The records must meet the selection criteria you entered in the orchestration and any other criteria you enter during testing. For example, if your orchestration runs on all opportunities with win probabilities greater than 30 percent, then you can add the condition to select only those with a specific name, such as Test1, for example. To avoid spamming real customers with automated steps, don't include customer email addresses in the test records. Create yourself as a contact instead.	Open either the Opportunity or Leads work areas and create your test records from there.	See the topic: *Test an Orchestration*
7	Run the Associate Orchestrations process to associate existing records to new orchestrations. You can run this process on a schedule. After an orchestration is active, new records are associated with it automatically.	**Navigator** > **Tools** > **Scheduled Processes**	See the topic: *Associate Records to Orchestrations*
8	If your orchestrations include failure paths (steps that follow up when things don't go as planned), then run the Process Orchestration Overdue Events process on a schedule. This process ensures that overdue steps don't cause orchestrations to stall.	**Navigator** > **Tools** > **Scheduled Processes**	See the topic: *Ensure That Overdue Steps Aren't Left Hanging*
9	Test your orchestration. The application performs the validations and displays any errors, one error at a time. For example, you can't test an orchestration if	**Navigator** > **Configuration** > **Application Composer** > **Orchestration Setup** > **Action** > **Start Testing**	See the topic: *Test an Orchestration*

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Step	Description	Navigation	Where to Get More Details
	some of the steps aren't properly linked to other steps. All wait steps are left out of the testing. If everything checks out, then open one of the test records to see the run-time behavior. When you're done, select **End Testing**.		
10	Activate the orchestration to make it available for use. If two orchestrations apply to the same records, then the one with the lowest rank is evaluated first.	**Navigator** > **Configuration** > **Application Composer** > **Orchestration Setup** > **Action** > **Activate**	See the topic: *Activate an Orchestration*
11	If you must make changes to an orchestration that's in the Active status, you must clone it first. You make your changes in the clone and then activate the clone. After the clone is active, you can archive the previous version. Any opportunities that are currently in the middle of the running the archived orchestration continue with the archived orchestration. **CAUTION:** You can't take any action on an orchestration after you archive it.	**Navigator** > **Configuration** > **Application Composer** > **Orchestration Setup** > **Action** > **Clone**	See these topics: • *Edit an Orchestration* • *Remove an Orchestration from Use by Archiving It*

Create Sales Methods and Stages

Oracle provides several sales methods with your application, but you can create your own sales methods and stages to support different ways of selling. The sales method and its stages form the framework for the sales orchestrations you create. For example, closing a deal for large equipment may take much longer and require more sales stages than selling accessories for that equipment. The sales method stages become the stages of the orchestration.

Here's how to create and edit sales methods.

1. From Setup and Maintenance, open the task **Manage Sales Methods and Sales Stages**:
   o Offering: Sales
   o Functional Area: Opportunities
   o Task: Manage Sales Methods and Sales Stages

2. On the Manage Sales Methods page, edit a sales method by clicking its name or click **Create**.

3. Leave the default value of **Common Set** for the **Set** field. Other values apply for implementations that require different sales methods for different business units.

4. Enter a name for the sales method and an optional description. These entries aren't visible to salespeople by default, but can be made visible when you configure the UI.

5. To provide a default close date for opportunities when they're created, enter a number of days in **Close Window**.

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Create or edit the sales stages for the sales method as described in the following section.

6. Save your changes.

> **Note:**
>> ○ The **Enable Revenue Line Set Capability** option is used only for multiple business unit implementations.
>> ○ You can use the **Disable** option to remove any unused sales methods from use. You can't delete sales methods after you create them.

Create or Edit Sales Stages for Sales Methods

Here's how to create or edit sales stages for a sales method.

1. Edit a sales stage by clicking its name link or click **Create**.
2. Enter basic information about the sales stage, including predefined values for win probability and analytics reports:

Field	Description
Name	Stage name visible in the UI.
Phase (For Sales in the classic user experience only. This option isn't used for Sales in the Redwood user experience.)	Select a classification of the sales stage. You can define the sales stage phases by using the Manage Sales Stage Phase Codes task from the Setup and Maintenance work area.
Description	Description visible in the UI.
Status	Use the status of **Open** for all stages representing opportunities that are still in progress.
Order	Enter a number for the order of this sales stage in the sales method.
Quota Factor	Enter any number in this field. This number is used only for legacy reports, but entry is required.
Disable	Select the Disable option to remove any unused sales stages from view. You must not disable sales stages after they're used in opportunities.
Win Probability	Enter a default win probability for opportunities in this stage.
Duration (For Sales in the classic user experience only. This option isn't used for Sales in the Redwood user experience.)	The number of days this stage should last. When an opportunity is in a sales stage longer than the duration, the opportunity is considered stalled. Stalled opportunities appear on the Stalled Deals Infolet and underlying report.

3. Add any fields that you want to make required for opportunities in the Additional Required Fields region.

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4. For the Sales in the classic user experience only, add any activity templates you've created in the Activity Templates region. The activity templates can automatically create tasks and appointments, which appear in the Activities tab of the Edit Opportunity page in classic Sales pages.

5. Save your changes.

Enter Basic Details for the Orchestration

Enter the basic details about the orchestration, including the criteria for selecting the records the process will run on.

In this release, you can create one or more orchestrations for qualifying leads and taking opportunities from qualification to closing the deal. You can trigger different orchestrations for different sets of records. For example, you can trigger different orchestrations for different accounts, partners, sales channels, assets, close dates, competitors, and so on.

> **Note:** Orchestrations get assigned a rank at creation. If there's an overlap in record selection criteria between Active orchestrations, then the orchestrations run in ascending order. Those with a smaller rank number get priority over those with higher numbers.

1. Open Application Composer (**Navigator** > **Configuration** > **Application Composer** > **Orchestration Setup)**.
2. Click **Create Orchestration**.
3. Enter a name of the orchestration and an optional description.
4. Select the object, either Sales Lead or Opportunity.
5. For Opportunity, select the sales method from the **Striping Field Value** field.
6. Define the record set the orchestration applies to, by entering the parameters that will trigger the orchestration:
    a. If all conditions must be satisfied (logical AND), select **Include all of**. If any one of the conditions triggers the process (logical OR), select **Include any of**.
    b. Select the attribute, an operator, and a value. Values aren't required in all cases, when you specify an **Is Null** operator, for example.
    c. Add additional conditions by clicking **Add Another Rule** (plus sign).
7. Click **Save**.

    The application opens the first orchestration stage. For opportunities, that's equivalent to the first sales stage of the Sales Method you specified. For leads, the first orchestration stage is the first lead status.
8. Click **Start**.

Results:

You are now ready to create the list of objectives and steps:

- *Create the List of Objectives*
- *Two Ways of Creating Orchestration Steps*

Create the List of Objectives

Create a list of business objectives for each orchestration stage that includes manual tasks for salespeople to perform.

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You must create at least one objective for each stage with manual tasks and each objective must be mapped to at least one step that completes it. Examples of objectives for the opportunity Qualification stage may include: Engage Customer and Create Interest, Identify Customer Pain Points, Confirm Budget and Timeline, Confirm Qualification, and so on. You can consider the Engage Customer and Create Interest objective to be met when a salesperson specifies the call to the customer step was a success, for example.

Salespeople can view the list of objectives for all the orchestration stages and they can see which of the objectives have been fulfilled as they progress through the orchestration.

Before you start

You must enter the basic information for the orchestration as described in the topic *Enter Basic Details for the Orchestration*.

Here's what to do

1. Click the name link for the draft orchestration that you created.
2. Click **Start** on the first stage.

   The application displays the stage definition page for the first stage.
3. If you want to define the objectives for a different orchestration stage, click on the orchestration stage name on the right of the page.
4. In the Orchestration stage definition page, make sure that the **Objectives** tab is selected.
5. For each objective, click **Add Objective**.
6. Enter the objective name and description and save.

   The objective is created with the **New** status. That status changes to **Mapped** after you add the steps that complete that objective.
7. Salespeople see the list of objectives you add in the numerical order shown in the Objectives tab. If you need to changes the order, then click **Actions** menu and use the **Move Up** or **Move Down** commands to reorder them.
8. When you're done entering all the objectives for the stage, you have two options:
   - Create objectives for the next orchestration stage by clicking **Continue**.
   - Create the steps to complete the objectives you just entered as a diagram on the **Diagram** tab. You can also create them as a list on the **Steps** tab. Creating the steps as a diagram makes it possible for you to view the logical structure of your steps as you work.

What to do next

Two Ways of Creating Orchestration Steps

Two Ways of Creating Orchestration Steps

There are two ways you can create the orchestration steps. You can create them as a diagram or you can create the steps individually as a list.

Creating Orchestration Steps as a Diagram

The Diagram tab makes it easy to view the different branches of your orchestration and understand the whole orchestration flow. You add steps by clicking **Add** (the plus sign) on a step or on a link between steps. Doing so automatically links steps together in the success path.

The success path, the steps salespeople take if everything goes according to plan, shows vertically.

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To add the failure path, the steps that should be taken when things don't go as planned, you add a Logic node and create the failure path from that. The failure path steps are displayed horizontally.

> **Note:** For tasks, you can create a failure path only on those tasks that include a smart action that can be evaluated by the application. This includes all of the communications actions, including call and send email.

This screenshot shows a portion of the vertical success path (callout 1) and the horizontal failure path (callout 2).
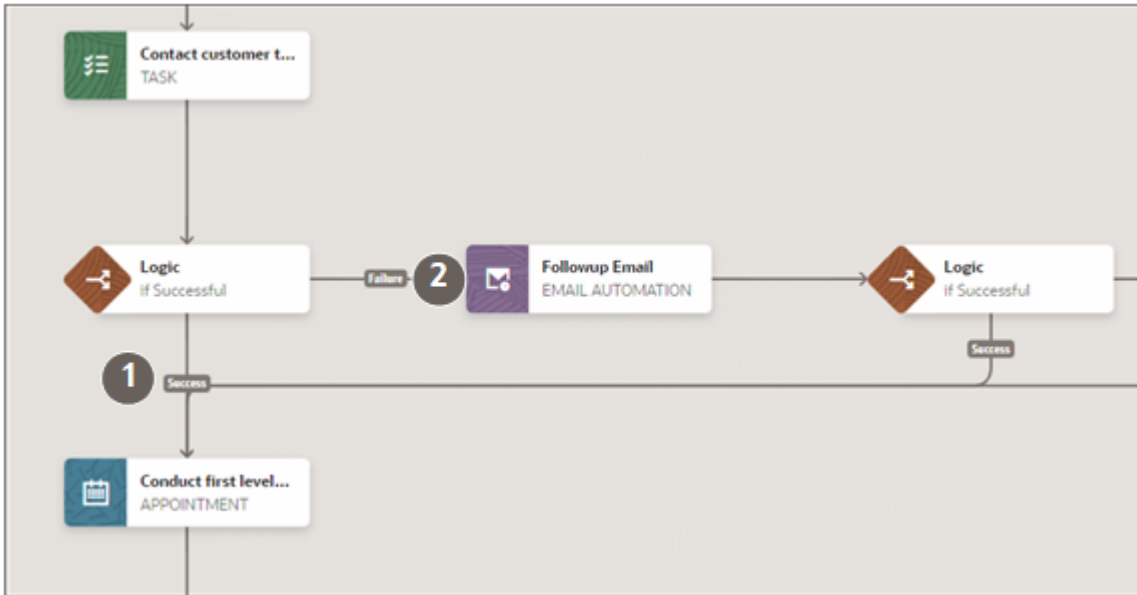
> **Note:** As a best practice, always edit the properties of each step you add right away. This ensures that you enter all of the required information for each step.

Creating and Viewing Orchestration Steps as a List

You can also create or edit steps individually on the Steps tab. Because the Steps tab lists the steps, you can link the steps only by editing each step individually and entering the next steps. The Steps tab doesn't include the Logic node because all of the branching information is captured in the steps themselves.

> **Tip:** The Steps tab is especially useful for fixing linking problems that can occur as you create the diagram and also for locating and fixing validation errors.

Key Difference Between the Two Authoring Modes

You enter success criteria and the next success and next failure steps differently in the two authoring modes. When you create the orchestration as a diagram, you create the branches by adding a Logic node. The Logic node makes it possible to create the next failure step right away and also stores the success criteria for the preceding step. By contrast, when you create steps in the Step tab, the success criteria and the next success and next failure steps are stored in the step itself. There's no Logic step.

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Commonalities

In both UIs, you create each step it two parts:

1. You add the step.

   You enter the step name and description that appears in the orchestration setup UIs, select the step type, and select an action.

   For manual steps (steps that ask salespeople to take action), you must either select task or appointment type. It's the addition of a smart action to manual steps that determines which buttons or windows appear for users.

2. You click **Edit Properties** in the Actions menu to enter information specific for the step type you added.

   For the manual steps (tasks and appointments), the information you enter in properties is what salespeople see in the Guidance panel at runtime. It also provides the template for the task or appointment that's being created in the background.

   For automatic steps, you specify details of the automation. For the Wait step, you enter the wait time, for example. For the Email Automation step, you specify the email template to be used, and so on.

   > **Note:** As a best practice, click **Edit Properties** right after you add each step. This way you won't forget to enter required information and save time troubleshooting during testing.

Related Topics
- Create Orchestration Steps as a Diagram
- Create the Orchestration Steps on the Steps Tab

Create Orchestration Steps as a Diagram

You can create the orchestration steps as a diagram. The diagram makes it easy to visualize how the different steps are linked and to view the different branches of the orchestration flow.

You must create at least one step for each orchestration stage and you must include at least one Next Stage step for every orchestration stage except the last. Creating a step involves two actions:

Before you start

Create the List of Objectives

Here's what to do

1. Click the orchestration stage you want to set up.
2. Click the **Diagram** tab on the Orchestration stage definition page.
3. Click **Add** (the plus sign icon) to add a step:
   - If you're adding a node at the end of a branch or on the first node, then hover over the step until you see the plus sign.
   - If you are adding a node between two nodes, then hover over the line connecting them and click the plus sign.

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4. Select the step type.

   For step types see *Types of Orchestration Steps*

   > **Note:** If you want to create failure steps, then you must first create a logic node for the previous step and add the failure step to that logic node. See the topic *Add a Logic Node for Failure Paths*.

5. In **Step Name**, enter the name that appears in orchestration setup.
6. Enter step description in the **Suggestion Text** field. The suggestion text is visible only in the step definition itself.

   > **Note:** For manual steps, what you enter in Step Name and Suggestion Text becomes the default title and description that salespeople see in the Guidance panel. Both get copied over to the properties where you can edit them and change them. The step title and description you display at design time can be different from what you display for salespeople at runtime.

7. If you selected Task or Appointment as the step type, then select the recommended action for the salesperson to take from the **Action** list.

   For example, if you're creating a task asking the salesperson to call the customer, then select the Call action. Because Call is one of the smart actions, the salesperson will see a recommendation with a Call button that they can click to call the customer. This step also creates a task to call the customer in the list of pending activities.

   If you don't select an action, then the salesperson clicks **Complete** to indicate the task is completed.

   Task and Appointment type steps are manual steps. You're asking the salesperson to take an action, so the Execution field shows Manual. You don't select an action for automatic steps and the Execution field shows Automatic.

   > **Note:** To delete the value in the Action field, or in any other drop-down field, you must press either the Tab or the Return keys on your keyboard after deleting.

8. Click **Save**.

   The step is added to the diagram.
9. Click the **Actions** menu (three dots) on the node and select **Edit Properties**.
10. Enter the step details. If the step is required to complete one of the objectives, then be sure to map the objective.

    What you enter depends on the node type you selected. For tasks, you're entering the details of the task. For appointments, the appointment details include scheduling information that the salesperson updates after they contact the customer.

    For examples of the types of steps you can create and how salespeople interact with them, see the topic *Orchestration Step Examples*.
11. Click **Save**.

What to do next

Test an Orchestration

The Logic Node

When you create steps using the diagram, you add a Logic node to a step so that you can create a failure branch in your orchestration. The Logic node makes it possible for you to create the next step on failure with a click of a button. The next step on failure is the step the orchestration will display if the current step fails to achieve its goal.

The Logic node also makes it possible to enter success criteria that have to be met for the orchestration to go to the next success step. For example, if you add a logic node to a call appointment, you can specify that the call is a success only when the salesperson specifies a positive outcome.

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In the Steps tab, there's no Logic node. Instead, you enter the next steps on success and failure as well as any success criteria in the steps themselves.

Related Topics
- Two Ways of Creating Orchestration Steps

Add a Logic Node for Failure Paths

Add a logic node after a step to branch the orchestration to the failure path or to take it back to the main success path. For example, you can add a logic node to a call task, so that you can ask the salesperson to try again in a couple of days if they don't reach the customer the first time. You can then add a Logic node to the follow-up call task. If the second call is a success, you can take the salesperson back to the success path.

> **Note:** For tasks, you can create a failure path only on those tasks that include a smart action that can be evaluated by the application. This includes all of the communications actions, including call and send email. You can't branch into a failure path for tasks that require the salesperson click the Completed button to complete the step or for tasks that show or update information, for example.

1. Click **Add** on the step where you want to add the Logic node and select **Logic**.
2. Click **Add** (round plus sign) on the horizontal failure path and add the basic information on the failure step.
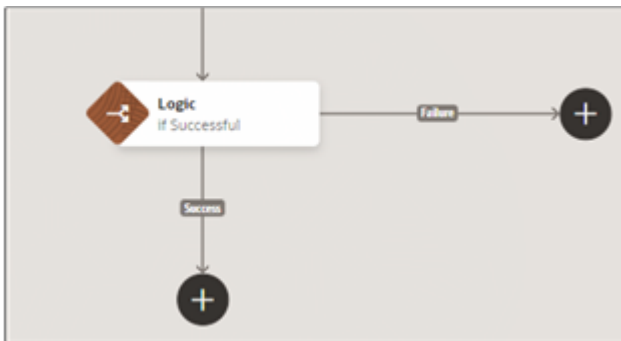
3. Unless you're adding the logic step between two steps, add the success step by clicking **Add** (round plus sign) below the logic step.
4. On the Logic node, click the **Actions** menu (three dots) and select **Edit Properties**.
5. Expand the Success Criteria section and enter success criteria if the step permits it. For example, you may consider the call appointment a success when the salesperson specifies Successful in the Outcome field..

   > **Note:** You can't enter success criteria in the logic node unless you already added the success and failure steps.

   The Next Step on Success and Next Step on Failure fields display the names of the steps the logic node is linked to.

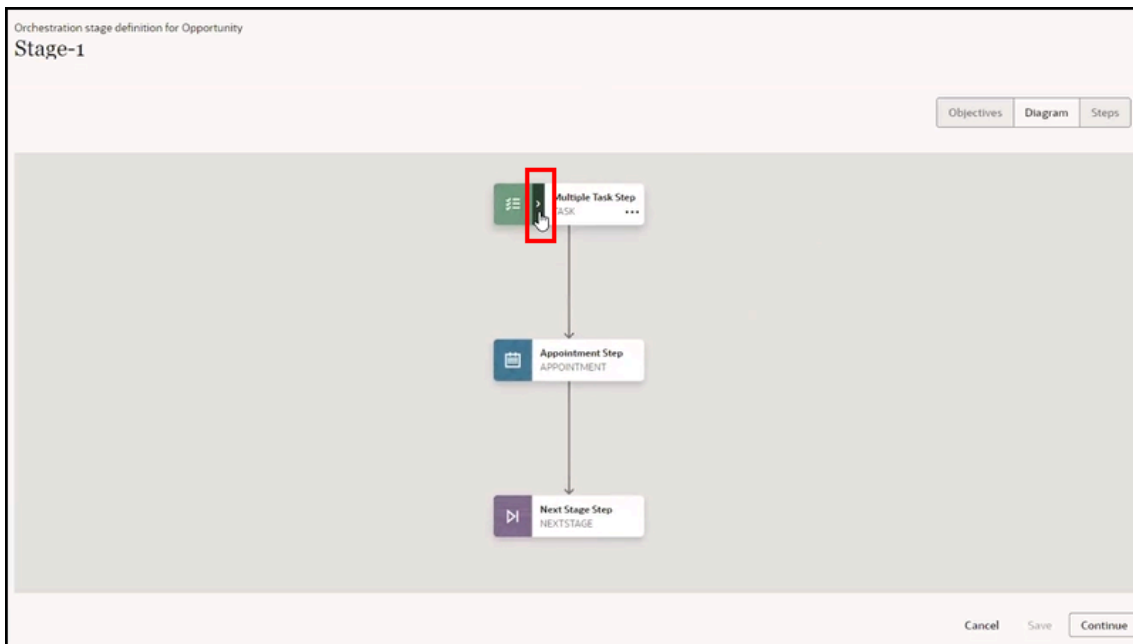| Field	Description
Next Step on Success	The next step that the orchestration displays of the success criteria are met or the salesperson clicked **Completed**. If you are working in the diagram, then the success step is already populated.
Next Step on Failure	The step that's activated when the current step doesn't meet the success criteria by the due date and any grace period.

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6. Manual steps (steps that require salespeople to take action) make it possible for you to:

   ○ Prevent salespeople from skipping a step by turning off **Allow skipping this step** option. Turning off this option removes the Skip button from the UI for the step.

   ○ Evaluate the success criteria you entered even when salespeople click the **Completed** button, by turning on the **Evaluate success criteria when marked as completed** option. If the criteria aren't met, then the orchestration goes to the next step on failure.

7. Click **Save**.

Can I create multiple tasks within a step?

As an administrator, you can create multiple tasks within a single step using a logical diagram view of the process. The diagram makes it easy to view the different tasks that are linked to a step by expanding the step as shown in this sample orchestration flow.

Follow these steps:

1. Expand the task to the view the different tasks linked inside the logic task node.

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2. Click the Actions menu (three dots) on the node and select **Edit Properties**.
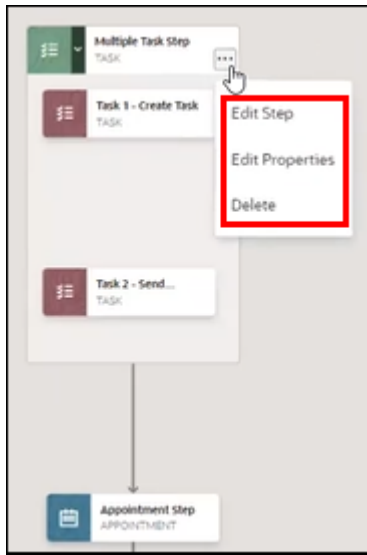
3. From the Orchestration stage definition view, you can edit the properties of each task in the step such as delete or add extra tasks up to a maximum of 3 tasks to a step as highlighted in the screenshot.

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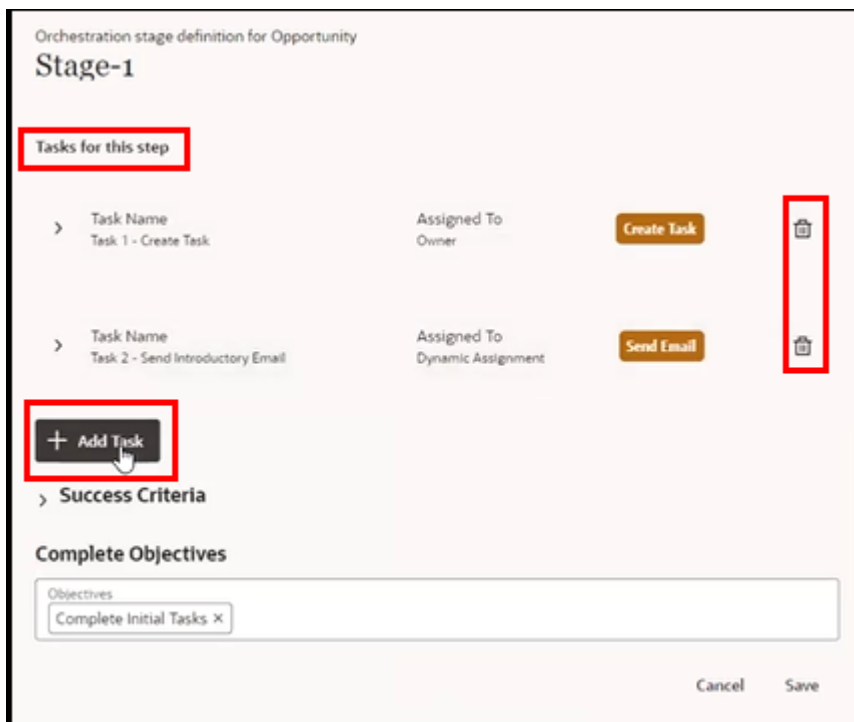
Create the Orchestration Steps on the Steps Tab

Instead of using the diagram to create or edit your steps, you can use the Steps tab to create the steps as a list. On the Steps tab, you enter the success criteria in the step itself and link the steps by entering the next success step and the next failure step. The Steps tab doesn't list any Logic nodes as the information is all contained in the steps themselves.

Create the steps that complete the objectives you created for each orchestration stage that asks salespeople to take action. You must create at least one step for each stage and you must include at least one Next Stage step for every orchestration stage except the last. Creating a step involves two actions:

Before you start

Create the List of Objectives

Here's what to do

1. Select the orchestration stage.
2. Make sure that **Steps** are selected on the Orchestration stage definition page.
3. Click **Add Step**.
4. Select the step type.

   For step types see *Types of Orchestration Steps*
5. In **Step Name**, enter the name that appears in orchestration setup.
6. Enter step description in the **Suggestion Text** field. The suggestion text is visible only in the step definition itself.

   > **Note:** For manual steps, what you enter in Step Name and Suggestion Text becomes the default title and description that salespeople see in the Guidance panel. Both get copied over to the properties where you can edit them and change them. The step title and description you display at design time can be different from what you display for salespeople at runtime.

7. If you selected Task or Appointment as the step type, then select the recommended action for the salesperson to take from the **Action** list.

   For example, if you're creating a task asking the salesperson to call the customer, then select the Call action. Because Call is one of the smart actions, the salesperson will see a recommendation with a Call button that they can click to call the customer. This step also creates a task to call the customer in the list of pending activities.

   If you don't select an action, then the salesperson clicks **Complete** to indicate the task is completed.

   > **Note:** To delete the value in the Action field, or in any other drop-down field, you must press either the Tab or the Return keys on your keyboard after deleting.

   Task and Appointment type steps are manual steps. You're asking the salesperson to take an action, so the Execution field shows Manual. You don't select an action for automatic steps and the Execution field shows Automatic.

8. Click **Save**.
9. Click the **Actions** menu (three dots) on the node and select **Edit Properties**.

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10. Enter the step details. If the step is required to complete an objectives, then be sure to map the objective.

   What you enter depends on the node type you selected.

   - Enter any success criteria when the step permits it:
      i. Open the Success Criteria section to display its fields.
      ii. Select an operator: either a logical AND (Include all of) or a logical OR (Include any of).
      iii. Add the objects, operators, attributes, and values. For example, to consider the appointment to be a success when the salesperson selects the Positive Outcome resolution code, you select the following: Wrap Up as the object, the Include All Of operator, Resolution Code as the attribute, and Positive Outcome as the value.

      Note: You may not be able to enter success criteria unless you already added a failure step.

11. Enter the next step in the **Next Step on Success** field to link steps together in the orchestration. Optionally, enter the **Next Step on Failure**.

   Note: For tasks, you can create a failure path only on those tasks that include a smart action that can be evaluated by the application. This includes all of the communications actions, including call and send email. You can't branch into a failure path for tasks that have the salesperson click the **Completed** button or for tasks that show or update information, for example.

Field	Description
Next Step on Success	The next step that the orchestration displays of the success criteria are met or the salesperson clicked **Completed**. If you are working in the diagram, then the success step is already populated.
Next Step on Failure	The step that's activated when the current step doesn't meet the success criteria by the due date and any grace period.

12. Manual steps (steps that require salespeople to take action) make it possible for you to:
   - Prevent salespeople from skipping a step by turning off **Allow skipping this step** option. Turning off this option removes the Skip button from the UI for the step.
   - Evaluate the success criteria you entered even when salespeople click the **Completed** button, by turning on the **Evaluate success criteria when marked as completed** option. If the criteria aren't met, then the orchestration goes to the next step on failure.

13. Click **Save**.

What to do next

Test an Orchestration

Orchestration Validation Process

You can now validate orchestrations for errors and fix them using the orchestration designer. You don't have to wait to perform a test on a limited number of records before you activate your orchestration to make it available for use. The validation process helps you find and fix the errors as you create your orchestration. This saves you time and facilitates the rollout of orchestrations.

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When you're ready to activate your orchestration and click Activate from the actions menu, you'll get a message "Once activated, you can't edit or delete an orchestration. Active orchestrations can only be archived." When you continue, if there are any issues that need fixing, you'll get a display similar to the following screenshot.

Specify Step Due Dates and Grace Periods

To specify a due date for a task you want salespeople to complete, you enter the number of days past the time the previous orchestration step was completed. In addition, you can provide a grace period of up to 23 hours for the salesperson to complete the task. Salespeople can manually enter a new due date for task, if need be.

Here's what happens when salespeople don't complete the task by the due date plus any grace period, and they don't manually postpone the due date:

- The orchestration step is marked as skipped

- The Guidance panel displays the message "You're all caught up for now."

- The task status is changed to Canceled.

- If the task step is mapped to an objective, that objective is marked with an X, as not complete.

- If you provide a failure step, then the orchestration moves to that failure step. For example, you can have the orchestration automatically notify the manager when the task isn't completed or send a reminder to the sales team. If you provide failure steps, then you must run the Process Orchestration Overdue Events process regularly.

- If you don't provide a failure path, then the orchestration waits.

- Salespeople can open the Objectives panel on the record summary page to view the skipped step and click Complete to indicate the task has been completed and move orchestration to the next step.

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Appointments are created and scheduled automatically behind the scenes at the time you provide in the Start in Hours field. The assumption is that the salesperson reschedules the appointment to a time when the participants are available. If the appointment isn't updated by the appointment time plus any grace period you enter, the behavior is similar to tasks. The only difference is that appointments don't have any associated status.

Orchestration Step Examples

Here are some examples of different types of steps you can set up and how salespeople interact with them.

- o Manual steps:

    - *Call and Zoom Web Conference Appointment Step*
    - *Send Email Step*
    - *Step to Review Opportunity or Lead Information*
    - *Step That Creates a Manual Task for Others*
    - *Step for Manual Opportunity Field Updates*
  - o Automatic steps:

    - *Wait Step*
    - *Stop Step*
    - *Step That Automatically Updates Fields*
    - *Automate Actions Using a Groovy Script*
    - *Automatically Send a Mail-Merged Email*

Call and Zoom Web Conference Appointment Step

Here's an overview of how you create a step that prompts the salesperson to hold a call or a Zoom web conference appointment and how salespeople see and interact with that step.

Setup

> **Note:** When you create nodes in the Diagram view, the nodes are automatically linked together on the success path. To create a node for the failure path, you add the Logic node. The Logic node includes the success criteria and specifies the next steps if those success criteria are met or not. You can create the success and failure steps directly from the logic node. If you're creating the step in the Step tab, you enter the success criteria and the next success and failure steps directly in the step itself.

1. Create the step with these entries:

Field	Value
Step Name	Enter the heading for the appointment. For example: Hold demo meeting. The step name appears in the orchestration setup UI and is automatically copied over as the subject of the appointment in the properties page.

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Field	Value
Suggestion Text	Add details of the recommended action. For example: Hold initial demo meeting with contacts. The text gets copied to the appointment description.
Type	Appointment
Action	Select either **Call** or **Start Web Conference**. Your selection determines what type of appointment gets created. Selecting Call, displays the Call button, which dials the customer. Selecting Start Web Conference, displays the Start Web Conference button, which launches a web conference. **Note:** Don't select Create Appointment.

2. Click **Add** to save the step.
3. Click **Edit Properties** to edit the step.
4. The entries you make in the Appointment Properties page, automatically create an appointment in the background. The appointment is created as soon as the orchestration displays the appointment step, even before the salesperson clicks the Schedule Appointment button. If your organization has integrated Office 365, then the appointment is also added to the calendar. Salespeople can update the times and duration of the appointment, of course.

Field	Value
Subject	The subject of the appointment. Your entry appears as the step heading in the Guidance panel for salespeople.
Type	Appointment type appears in the appointment itself. It doesn't affect orchestration functioning.
Start in Hours	The number or hours since last step in the orchestration is completed. This is the start time of the appointment created automatically by the step. Salespeople can reschedule the appointment.
Duration in Minutes	Suggested duration of the appointment. Salespeople can change this as well.
Description	Description that appears in the Guidance panel step and in the appointment itself.
Attachment fields	Add attachments to the appointment. Salespeople see links to the attachments in the Guidance panel on the record overview page and can open them from the appointment.
Sales Guide	Select any interactive scripts (sales guide) you want salespeople to use during their meeting.
Grace Period to Complete	The duration of the grace period in hours. If the appointment isn't completed within the grace period after the due date, then the orchestration proceeds goes to the next step on failure.
Complete Objectives	Select any objectives this step completes. (In the Steps tab version, this field appears at the bottom of the page.)

5. Enter the success criteria and the next steps on success and failure.

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- o If you're creating the step as part of the diagram, then add a Logic node.

- o If you're creating the step in the Steps tab, then you enter the information on the same page.

For example, enter the following criteria to specify a step as a success if the salesperson selects a positive outcome in a call wrap up:

- o Object: Wrap Up

- o Include all of

- o Attribute: Resolution Code

- o Operator: Equals

- o Value: Positive outcome

> **Note:** The success criteria attribute names don't necessarily match the runtime field names.

6. You can prevent salespeople from skipping a step by turning off **Allow skipping this step** option. Turning off this option removes the Skip button from the UI for the step.

7. You can have the application evaluate the success criteria you entered even when salespeople click the **Completed** button, by turning on the **Evaluate success criteria when marked as completed** option. If the criteria aren't met, then the orchestration goes to the next step on failure.

8. Click **Save**.

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How Salespeople Interact with an Appointment Step

1. Here's what salespeople see when the step appears on an opportunity.

Guidance

Conduct discovery call

Complete qualification criteria

Schedule Appointment ▼   Skip

Stage Objectives

- Customer pain points and timeline confirmed

- Identify competition

- Initial budget discussion

- Decision maker confirmed
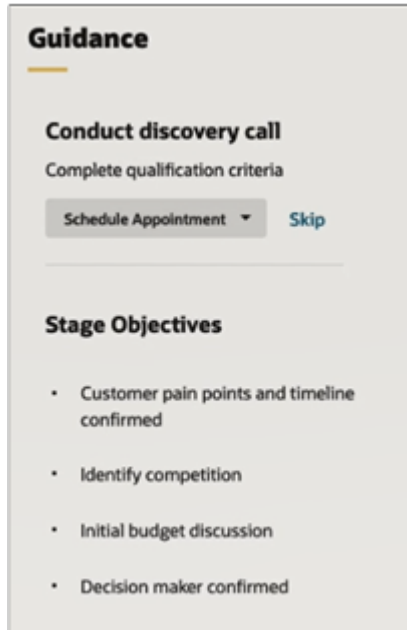
2. When a salesperson clicks **Schedule Appointment**, the application opens the edit page where you can add participants, change the start time and duration, and add schedule reminders. Salespeople can't change the type of appointment from call to web or vice versa, however. That's determined in the step setup.

> **Tip:** As a best practice, salespeople should just save the appointment right away after the click the **Schedule Appointment** button. They can then go to Microsoft Outlook to add participants and find their availability. The details you enter in Outlook are automatically synced back to Sales provided you've implemented the Outlook integration. The Sales appointment functionality doesn't include availability information or provide a way to automatically add web meeting or call details.

3. When the salesperson saves the appointment, the button changes to **Call** or **Start web conference**, depending on which option you selected during setup.

4. At the appointed time, salespeople initiate the call or web conference by clicking the button. The scheduling and other details are listed in the appointment itself. Salespeople can view the appointment details in their list of activities. If you've included a sales guide, salespeople can open the interactive questionnaire during the appointment.

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5. The appointment is considered as a success when the salesperson selects Positive outcome when logging the call.

If the appointment isn't held within the grace period or doesn't meet the success criteria, then it goes to the next step on failure.

Send Email Step

Here's an overview of the orchestration step that prompts a salesperson to send an email to the primary contact. In the background, the application creates a task that appears in the Pending section in the list of activities.

Note: When you create nodes in the Diagram view they're automatically linked together on the success path. To create a node for the failure path, you add the logic node. The logic node includes the success criteria and specifies the next steps if those success criteria are met or not. You can create the success and failure steps directly from the logic node. If you're creating the step in the Step tab, you enter the success criteria and the next success and failure steps directly in the step itself.

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Setup

- Entries in initial step creation:

Field	Value
Step Name	Enter the heading for the action that you want salespeople to take. For example: Email Product Overview. The step name appears in the orchestration setup UI and is automatically copied over as the subject of the appointment in the properties page.
Suggestion Text	Add details of the action. For example: Send product brochure to contacts. The text is automatically copied over as the description of the task in the properties page.
Type	Task
Action	Send Email. Your selection of the smart action displays the **Send Email** button in the recommendation.

- Entries when you click **Edit Properties**:

Field	Description
Subject	Enter the subject of the task that gets created automatically. What you enter displays as the step title. It doesn't display in the email subject.
Type	Email
Due in Days	If Receive Reply to Complete Step is off, enter the number of days the salesperson has to send the email starting at the time the last step was completed. If Receive Reply to Complete Step is turned on, then enter the number of days the application will wait for the reply from the customer. If the step isn't completed by the deadline you set plus any grace period, the orchestration moves to the step you enter in Next Step on Failure. If you don't provide a step on failure, then the orchestration marks any associated objective as failed and waits. When the salesperson finally takes action the orchestration restarts again. The action could be completing the task, rescheduling it, or clicking Skip or Complete.
Description	Description that appears in the task and in the step salespeople see on the Guidance panel.
Attachment fields	Attachments to the task. Salespeople see links to the attachments in the Guidance panel on the record overview page. Clicking the link opens the task in the list of activities where you can download the attachments. You can also add attachments to an email template you're using for this task.

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Field	Description
Use Email Template	Select an email template. See the topic *Create Email Templates* to learn how to create one.
Receive Reply to Complete Step	Switch on if you want the step to be deemed a success when the application receives a reply from the contact.
Grace Period to Complete	The grace period adds extra time before the orchestration moves to the next step on failure, if you provided one.
Complete Objectives	Select any objectives this step completes.

- Enter the success criteria and the next steps on success and failure.

  - If you're creating the step as part of the diagram, then add a Logic node.

  - If you're creating the step in the Steps tab, then you enter the information on the same page.

- You can prevent salespeople from skipping a step by turning off **Allow skipping this step** option. Turning off this option removes the Skip button from the UI for the step.

- You can have the application evaluate the success criteria you entered even when salespeople click the **Completed** button, by turning on the **Evaluate success criteria when marked as completed** option. If the criteria aren't met, then the orchestration goes to the next step on failure.

How Salespeople Interact with the Step

1. On the Guidance panel, salespeople see the text in the Subject field as the title along with the description text and a **Send Email** button.
2. The Pending section in Activities, displays the corresponding task with the information and due date you entered.
3. Clicking **Send Email** opens an email compose window addressed to the primary contact on the opportunity or lead. If you specified a template during setup, the compose window is populated with the mail-merged template.
4. The salesperson edits the email.
5. When the salesperson sends the email, the application marks the step and task as complete if you didn't turn on Receive Reply to Complete Step. The outgoing email is automatically recorded in activities.
6. The orchestration displays the next success or failure step when the step meets the success criteria you entered. For example, if you turned on **Receive Reply to Complete Step**, then the step is deemed a success when the reply is received.
7. If they don't want to send the email, salespeople may have other options:
   - Clicking the **Completed** button closes the task as complete and moves the orchestration to the success step. If you turned on the **Evaluate success criteria when marked as completed** option, and the step doesn't meet the criteria, then the orchestration moves instead to the next failure step.
   - Clicking **Skip** sets the task to the status of Canceled and moves the orchestration to the next success step.
   - They can also change the due date on the task by editing the task.
8. If the salesperson doesn't take action by the due date in the task plus the grace period, the orchestration moves to the next step on failure.

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Step to Review Opportunity or Lead Information

You can request salespeople to review and update different types of opportunity or lead information, including contacts, leads, campaigns, and so on.

Setup

- Entries in initial step creation:

Field	Value
Step Name	Enter the heading for the action that you want salespeople to take. For example: Update Opportunity Contacts. The step name appears in the orchestration setup UI and is automatically copied over as the subject of the appointment in the properties page.
Suggestion Text	Add details of the action. For example: Make sure that opportunity contacts include decision makers. The text is automatically copied over as the description of the task in the properties page.
Type	Task
Action	Any of the Show smart actions, such as Show Contacts, Show Leads, and Show Campaigns, for example. Provided you keep the default success criteria, when a salesperson clicks on the smart action button, the task is automatically marked as completed and the orchestration moves to the next success step.

- Entries when you click **Edit Properties**:

In the Task Properties, you enter information that automatically creates a task that appears in the Pending section in the Activities page. The information you enter in Task Properties appears in the task and on the Guidance panel.

Field	Value
Subject	Enter the subject of the task that gets created automatically. What you enter also displays as the step title on the Guidance panel.
Type	The task type displays only in the task itself, so doesn't matter. Select Administration, for example.

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Field	Value
Due in Days	The due date for the task in days since last step in the orchestration completed. If the step isn't marked as complete by the deadline you set, then the orchestration moves to the step you enter in Next Step on Failure.
Description	Description that appears in the task and step description in the Guidance panel.
Attachment fields	Attachments to the task. Salespeople see links to the attachments in the Guidance panel on the record overview page. Clicking the link opens the task in the list of activities where you can download the attachments.
Grace Period to Complete	Enter the number of hours the application will wait past the due date before the step goes to the Next Step on Failure, if you provided one.
Success Criteria	You can enter additional success criteria if you added a next step on failure.
Complete Objectives	Enter any objectives this step completes.

- Enter the success criteria and the next steps on success and failure.
    - If you're creating the step as part of the diagram, then add a Logic node.
    - If you're creating the step in the Steps tab, then you enter the information on the same page.
- You can prevent salespeople from skipping a step by turning off **Allow skipping this step** option. Turning off this option removes the Skip button from the UI for the step.
- You can have the application evaluate the success criteria you entered even when salespeople click the **Completed** button, by turning on the **Evaluate success criteria when marked as completed** option. If the criteria aren't met, then the orchestration goes to the next step on failure.

How Salespeople Interact with the Step

1. Salespeople see the step name and suggestion text with a Show <object name> button.
2. The Pending section in activities, displays the task with the information and the due date you entered.
3. If salespeople already reviewed the information, they can dismiss the recommendation by clicking the **Completed** button, moving the orchestration to the success step. If you turned on the **Evaluate success criteria when marked as completed** option, and the step doesn't meet the criteria, then the orchestration moves instead to the next failure step. Salespeople can also skip the step by clicking **Skip** to move the orchestration to the next step, if you turned on the **Allow skipping this step** option.
4. Clicking the **Show <object name>** button, opens a window displaying the list of the objects to review.
5. The step button in the step changes to **Complete**.
6. Clicking **Complete** closes the task as complete and marks any objectives linked to that step as complete. The orchestration moves to the next step in Next Step on Success.
7. Salespeople can also dismiss the step by clicking **Skip**. The orchestration then moves to the next success step. The task is marked with the status of Canceled.

Step That Creates a Manual Task for Others

Here's how to create a step that creates a task that tells a salesperson to create a task for others in the organization to complete.

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Setup

- Entries in initial step creation:

Field	Value
Step Name	Enter the heading for the action that you want salespeople to take. For example: Create Task for Sales Consulting. The step name appears in the orchestration setup UI and is automatically copied over as the subject of the task in the properties page.
Suggestion Text	Add details of the action. For example: Create a task to prepare the demo hardware. The text become the default description in the properties page.
Type	Task
Action	Create Task

- Entries when you click Edit Properties:
  In the Task Properties, you enter information that automatically creates a task that appears in the Pending section in the Activities page.

Field	Value
Subject	Enter the subject of the task that gets created automatically. The subject also appears as the title of the step on the Guidance panel.
Type	The task type doesn't matter, so select Demo, for example. This entry appears only in the task itself.
Due in Days	The due date for the task in days since last step in the orchestration completed. If the step isn't marked as complete by the deadline you set, then the orchestration moves to the step you enter in Next Step on Failure.
Description	Description that appears in the task and on the Guidance panel.
Attachment fields	Attachments to the task. Salespeople see links to the attachments in the Guidance panel on the record overview page. Clicking the link opens the task in the list of activities where you can download the attachments.
Grace Period to Complete	Enter the number of hours the application will wait past the due date before the step goes to the Next Step on Failure.
Success Criteria	You can enter success criteria if you added a next step on failure.
Complete Objectives	Enter any objectives this step completes.

- Enter the next steps on success and failure. You can enter success criteria if you added a next step on failure
  - If you're creating the step as part of the diagram, then add a Logic node.

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- o If you're creating the step in the Steps tab, then you enter the information on the same page.

- You can prevent salespeople from skipping a step by turning off **Allow skipping this step** option. Turning off this option removes the Skip button from the UI for the step.

- You can have the application evaluate the success criteria you entered even when salespeople click the **Completed** button, by turning on the **Evaluate success criteria when marked as completed** option. If the criteria aren't met, then the orchestration goes to the next step on failure.

How Salespeople Interact with the Step

1. On the Guidance panel, salespeople see the text in the Subject field as the title along with the description text and a **Create Task** button.
2. The Pending section in Activities, displays the corresponding task with the information and due date you entered.
3. Clicking **Create Task** opens the task creation page.
4. The salesperson enter the task information and saves, the task to create the task is marked as completed.
5. The orchestration displays the next success step.
6. If the salesperson doesn't take action by the due date in the task plus the grace period and doesn't postpone the due date, the orchestration moves to the next step on failure.

Step for Manual Opportunity Field Updates

Here's how to create a step that asks salespeople to manually update field values in an opportunity.

Setup

- Entries in initial step creation:

Field	Value
Step Name	Enter the heading for the action that you want salespeople to take. For example: Update Budget Availability. The step name appears in the orchestration setup UI and is automatically copied over as the subject of the task in the properties page.
Suggestion Text	Add details of the action. For example: Update the date the budget will be available. The text become the default description in the properties page.
Type	Task
Action	Update Opportunity

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- Entries when you click Edit Properties:

  In the Task Properties, you enter information that automatically creates a task that appears in the Pending section in the Activities page.

Field	Value
Subject	Enter the subject of the task that gets created automatically. The subject also appears as the title of the step on the Guidance panel.
Type	The task type doesn't matter, so select Administration, for example. This entry appears only in the task itself.
Due in Days	The due date for the task in days since last step in the orchestration completed. If the step isn't marked as complete by the deadline you set, then the orchestration moves to the step you enter in Next Step on Failure.
Description	Description that appears in the task and on the Guidance panel.
Attachment fields	Attachments to the task. Salespeople see links to the attachments in the Guidance panel on the record overview page. Clicking the link opens the task in the list of activities where you can download the attachments.
Update Fields	Select the attributes (fields) that you want to update. For each attribute you're asking salespeople to update, you must enter a default value. For date fields, such as Date Budget Available, select Run Date as the value and enter the number of days after the step is run.
Grace Period to Complete	Enter the number of hours the application will wait past the due date before the step goes to the Next Step on Failure.
Success Criteria	You can enter success criteria if you added a next step on failure.
Complete Objectives	Enter any objectives this step completes.

- Enter the next steps on success and failure. You can enter success criteria if you added a next step on failure
  - If you're creating the step as part of the diagram, then add a Logic node.
  - If you're creating the step in the Steps tab, then you enter the information on the same page.

- You can prevent salespeople from skipping a step by turning off **Allow skipping this step** option. Turning off this option removes the Skip button from the UI for the step.

- You can have the application evaluate the success criteria you entered even when salespeople click the **Completed** button, by turning on the **Evaluate success criteria when marked as completed** option. If the criteria aren't met, then the orchestration goes to the next step on failure.

How Salespeople Interact with the Step

1. On the Guidance panel, salespeople see the text in the Subject field as the title along with the description text and a **Update Opportunity** button. The Pending section in Activities, displays the corresponding task.
2. Clicking the **Update Opportunity** opens a side panel where the salesperson can make entries in the field.

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3. After the salesperson saves, the task is marked as completed.
4. The orchestration displays the next success step.
5. If the salesperson doesn't take action by the due date in the task plus the grace period and doesn't postpone the due date, the orchestration moves to the next step on failure.

Wait Step

A wait step lets you pause the orchestration for a period of time. While the orchestration waits, salespeople see the text you enter in the Step Name and Suggestion fields and can click **Resume** to move the orchestration to the next step.

1. Create a wait step with these entries:

Field	Value
Step Name	Enter the heading, for example: Wait 1 day.
Suggestion Text	Optional.
Type	Wait

2. Click **Add** to save the step.
3. Click **Edit Properties** (the pencil icon) to edit the step you just created.
4. Enter the wait time in days and hours.
5. In **Next Step on Success**, select the next step.
6. Click **Save**.

Stop Step

A stop steps stops the orchestration. Create a stop step for every branch in the orchestration. You must also end the orchestration with a stop step on the last orchestration stage. You can specify if a stop step exists the orchestration, so that the record can be picked up by other orchestrations. The stop steps display in the Guidance panel for salespeople to see.

Field	Value
Step Name	Enter a name such as Orchestration Stopped.
Suggestion Text	Optional instructions.
Type	Stop
Exit orchestration	Turning on this option exits the orchestration and makes it possible for other orchestrations to pick up the record, enabling you to branch and link orchestrations together. When this option is turned off, the orchestration stops, but remains associated with the record, preventing it from being picked up by other orchestrations.

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Step That Automatically Updates Fields

Here's how to create a step that updates one or more fields to the values you specify in the step. For example, you may want to automatically update the close date if the deal is close to completion so that the opportunity appears in your current quarter forecasts.

Setup

- Create the step with these entries:

Field	Value
Step Name	Enter the heading for the step that appears only in the setup UI. Since this is an automatic step, salespeople never see it.
Suggestion Text	Add optional details. These are seen only when you edit the step.
Type	Field Update

- In the Properties page, enter the fields and the values you want to update. You can add multiple fields by clicking **Add Another Rule** (the plus sign).

Field	Value
Attribute	Select the attribute that you want to update.
Value	Enter the value that you want to enter.

How Salespeople Interact with the Step

This step is automatic, so salespeople don't see any generated recommendations in the UI, but the updates are recorded and visible in Activities.

If the automatic field updates fail, perhaps because of a custom validation or a custom server trigger, the application creates a task, called Update Field, with a **Show Field** button. Salespeople click the button and manually update the field.

Automate Actions Using a Groovy Script

Here's how to create an Automation step that takes the action you specify in a Groovy script. You must create the Groovy script as a custom Smart Action ahead of time. This step is automatic, so salespeople don't see any generated recommendations in the UI.

Setup

1. Create the step with these entries:

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Field	Value
Step Name	Enter a name for the step. The name is visible only for the administrator.
Suggestion Text	Optional description.
Type	Automation
Action	Select the custom smart action with the Groovy script that you created in Application Composer. For the smart action to appear in this list you must enter these values in the Availability section: **Sales** in the **Application** field and **Orchestration** in the **UI Availability** field.

2. Click **Add** to save the step.
3. Click **Edit Properties** to edit the step.
4. In the Properties page, link to the next steps in the orchestration by selecting the next step in the **Next Step on Success** field.
5. Click **Save**.

Related Topics
- Overview of Smart Actions

Automatically Send a Mail-Merged Email

To automatically send mail-merged emails to contacts, you add the Email Automation step. Here's how.

Setup

- Create the email automation step with these entries:

Field	Value
Step Name	Enter the name of the step. What you enter is only visible in the setup UI.
Suggestion Text	Optional description, not visible outside the setup UI.
Type	Email Automation
Execution	Automatic (This field is not editable).

- While editing the properties, enter the following:

Field	Value
Send Email to Contacts Linked with the Lead/ Opportunity Where	Enter any additional conditions for selecting the records that trigger the email. Any conditions you enter here are in addition to the conditions you entered in the orchestration itself. For

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Field	Value
	example, you can specify that you want to send emails only to contacts where the Do Not Mail attribute is null.
Use Email Template	Select the email template. The list of values lists all of the templates for the object.
Receive Reply to Complete Step	Select this option if you want to consider the step a success when you receive a reply to the email.
Grace Period to Complete	If you opted to deem the step a success when the customer replies, then enter the period of time you want to wait for the response before moving the step to the next failure step.
Complete Objectives	Select any objectives this step completes. (In the Steps tab version, this field appears at the bottom of the page.

How Salespeople Interact with This Step

The step doesn't display for salespeople. The email is sent automatically. However, the email is recorded in Activities where salespeople can forward it or followup with additional emails in the same thread.

Associate Records to Orchestrations

You must associate the orchestrations you want to test or activate to existing records by running a scheduled process. The process is required only to associate existing records; new records are automatically associated with the appropriate active orchestration. You can set up the program to run periodically.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. On the Overview page, click **Schedule New Process**.
3. In the Schedule New Process window, enter `Associate Orchestrations` in the **Name** field and press **Return**.
4. Select the process and click **OK**.
5. You can run the process immediately by clicking **Submit** and also set it up to run regularly:

   a. Click **Advanced**.
   b. Click the Schedule tab.
   c. Select the **Using a schedule** option.
   d. Select the frequency and start date.
   e. Enter an end date far in the future.
   f. Click **Submit**.
6. Depending on your settings, your process runs immediately or at the intervals you specified. You can monitor its progress by searching for the process by name on the Overview page.

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Ensure That Overdue Steps Aren't Left Hanging

If you're including failure paths in your orchestrations, you must run the Process Orchestration Overdue Events process to ensure orchestrations aren't stalled. The process marks overdue steps that are past the grace period as skipped. Doing so advances the process to the next step.

The steps to run the process are the same as for the Associate Orchestrations process:

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. On the Overview page, click **Schedule New Process**.
3. In the Schedule New Process window, enter `Process Orchestration%` in the **Name** field and press **Return**.
4. Select the process and click **OK**.
5. You can run the process immediately by clicking **Submit** and also set it up to run regularly:
   a. Click **Advanced**.
   b. Click the Schedule tab.
   c. Select the **Using a schedule** option.
   d. Select the frequency and start date.
   e. Enter an end date far in the future.
   f. Click **Submit**.
6. Depending on your settings, your process runs immediately or at the intervals you specified. You can monitor its progress by searching for the process by name on the Overview page.

Orchestration Validations and Minimum Requirements

When you test or activate an orchestration, the application verifies that you met these minimum requirements before you can proceed:

- You must enter selection criteria for the records the orchestration will run on.
  You can use the same criteria for both the orchestration definition and for testing, or you can add additional criteria to specify the records you want to use for testing. You can test only on 3 records at a time. And you must use different records each time you test because the orchestration updates the record as it runs. If the combined selection criteria return more than 3 records for testing, the application uses the first 3.

- You must add at least one objective to each orchestration stage with manual steps and you must map each objective to one or more steps.

- Each orchestration stage must have at least one step. This can be any step, including Stop.

- Orchestration stages that include only automated steps don't require any objectives at all.

- Each orchestration stage, except the last stage, must have at least one Next Stage step to move the process to a different orchestration stage. The orchestration doesn't move to another stage by itself and you can't link individual steps between the stages.

- Each step, except the Stop step, must have a next success step.

- End the last stage in the orchestration with a Stop step.

- End each branch of the orchestration with a Stop step or a Next Stage step.

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- You must enter success criteria for orchestration steps that require them. You may want to deem an appointment to be a success when the salesperson selects a Positive Outcome as the status in their call wrap up, for example. You may decide that an email automation step is complete only when the contact responds rather than when the email is sent out.

This screenshot shows the diagram view of steps for the Unqualified lead stage. In this example, there are just two steps: a Show Contacts step which displays the lead contacts and the Next Stage step that moves the orchestration to a different stage. The Next Stage step is required in all orchestration stages except the last one. For testing purposes, you can skip orchestration stages by entering a Next Stage step by itself, but doing so makes no sense in production.
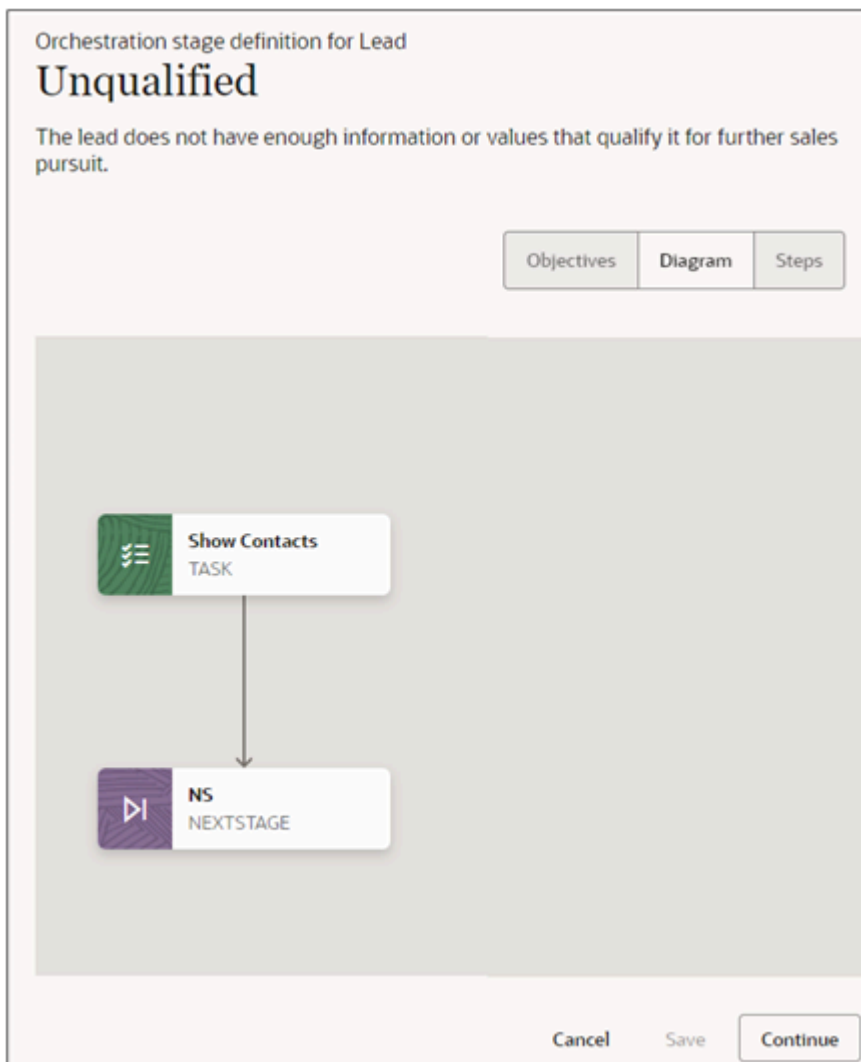
Can I create an orchestration with just one stage and one step?

Yes, an orchestration can have only one stage and you can add just one step to an orchestration stage. If a step requires a success step, then add a Stop step to satisfy that requirement. The only steps that don't require either a success or failure steps are the Next Stage and Stop steps.

If the step is a manual step (one that requires action by a salesperson) then you must also add one objective to the orchestration stage and map the step to it.

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Test an Orchestration

You can test an orchestration before activating it. You can perform the test on a very limited number of records and the test skips any wait steps to make it easier to test. However, any steps that update fields and take automatic actions including aromatically sending emails work as normal. You must ensure that you enter test email addresses so you don't spam your contacts. You can only test orchestrations in the Draft status.

Before you start

- You must create an orchestration that meets the minimum requirements and the orchestration must be in the Draft status.

- For each test, you must create no more than 3 new records that meet the testing criteria. The testing criteria are a combination of the orchestration criteria and the additional criteria you specify in the test. For example, your orchestration applies to all opportunities that use the Accelerated Sales Process with a win probability greater than 10 percent. During testing you specify that you want to test opportunities with names starting with TEST. In this case you must create at least 1, but no more than 3, opportunities that meet those criteria and use them to test. You must pick different opportunities for testing each time. That's because the orchestration may make changes in the opportunities as it runs.

Here's what to do

1. On the Orchestration Setup page, click **Actions** (the three dots on the right side of the page) and select **Start Testing**.

   A warning is displayed to prevent accidentally sending communication to external contacts and also to inform you that Wait type steps aren't tested.

2. In the Test Orchestration dialog box, click **Accept**.
3. In the Test Orchestration page, enter additional selection criteria for the records you want to test. The page displays the number of records that meet the combined criteria entered in the orchestration and on this page.
4. Click **Start**.

   The application validates your setup. You must correct any errors displayed on the page. The application displays only one error at a time, so you might need to test multiple times to fix them all.

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5. When you see the message Testing started, open one of the opportunities that match your testing criteria and start your testing.

Here's a sample of the guidance panel for the Opportunities page from where you can test your opportunity test record.

Guidance

Conduct discovery call

Complete qualification criteria

Schedule Appointment ▼   Skip

Stage Objectives

- Customer pain points and timeline confirmed

- Identify competition

- Initial budget discussion

- Decision maker confirmed

6. When you're done, go back to the Orchestration Setup page, and click **Actions** (the three dots on the right side of the page) and select **Stop Testing**.

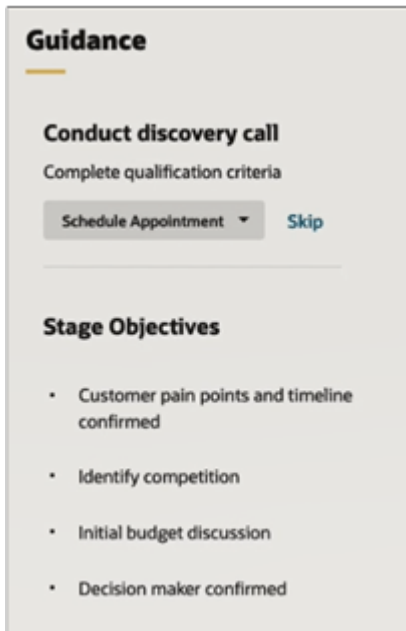> **Note:** You must associate the orchestrations you want to test or activate to existing records by running the **Associate Orchestrations** scheduled process. The process is required only to associate existing records; new records are automatically associated with the appropriate active orchestration. You can set up the program to run periodically. See *Associate Records to Orchestrations* for more information.

Activate an Orchestration

After you complete creating the orchestration, you must activate it to make it available for use.

1. Navigate to the Orchestration Setup page. **Navigator** > **Configuration** > **Application Composer** > **Orchestration Setup**
2. On the Orchestration Setup page, click **Actions** (three dots) and select **Activate**.
3. In the **Activate orchestration?** dialog box, click **Yes**.

The application validates the orchestration logic and informs you if there are any basic errors. For example, if you forgot to link one of the steps, the orchestration won't activate.

> **Note:** Orchestrations get assigned a rank at creation. The rank determines the order in which the orchestrations are evaluated and applied. The orchestrations are applied in ascending order to handle cases when the opportunity selection criteria overlap. Those with a smaller rank number get priority over those with higher numbers.

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Edit an Orchestration

You can only edit an orchestration in the Draft status. To edit an orchestration that's active or archived, then you must clone that orchestration and edit the clone.

1. Navigate to the Orchestration Setup page. **Navigator** > **Configuration** > **Application Composer** > **Orchestration Setup**
2. If orchestration you want to edit is archived, then you must first display the archived orchestrations by clicking **Actions** > **Show Archived** . The Actions button is located at the top of the page.
3. If the orchestration you want to edit is active or archived, then clone the orchestration by clicking **Actions** (three dots) and selecting **Clone**
4. To edit the basic details of the orchestration, including the name and the selection criteria that specify which records the orchestration runs on, click **Actions** (three dots) on the right side of the row and select **Edit**.
5. To edit the objectives and steps, click the orchestration name link.

> **Note:** To delete values you entered in drop-down fields, you must press either the Tab or the Return keys on your keyboard after deleting your entry. For example, if you select an email template and then want to delete the entry, you must press Tab or Return after deleting.

Remove an Orchestration from Use by Archiving It

While you can't delete an orchestration you created, you can remove it from use by archiving it. Any existing records already running the orchestration will continue to run that orchestration, but no new records will.

> **CAUTION:** You can't take any action on an orchestration after you archive it.

Copy an Orchestration by Cloning It

You can make a copy of an orchestration by cloning it.

On the Orchestration Setup page, click **Actions** (the three dots icon) and select **Clone**.

> **Note:** You can't change the step type for the steps in a cloned orchestration. If you need to change a step type from a task to an appointment, for example, you must add a new step and delete the old.

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Export and Import Orchestrations

You can export orchestrations you create in one environment and import them into another.

You perform the migration in two stages:

1. Use the Functional Setup Manager (the Setup and Maintenance work area) to export the Opportunity functional area setup data from the source environment and import it to the target environment. Doing so migrates activity templates, which are used to store orchestration step properties, and sales methods, which determine orchestration scope and stages. Both are required for opportunity orchestrations. This step is a prerequisite for migrating the orchestrations themselves.
2. Use the Migration feature to export and import the orchestrations themselves. For more information on the Migration feature, see the topic *Overview of Migration* in the Configuring and Extending Applications guide.

Migrate Sales Methods and Activity Templates Using the Functional Setup Manager

1. In the Setup and Maintenance work area, open the **Sales** offering.
2. In the left-hand Functional Areas pane, select the **Opportunities** functional area.
3. Click the **Opportunities: Actions** button (the down arrow icon) and select either **Export** > **Create New** or **Import** > **Create New**.

For additional details on how to export and import this setup data, see the topics:

- *Export Setup Data Using Offering or Functional Area*

- *Import Setup Data Using Offering or Functional Area*

Export Orchestrations Using the Migrate Feature

1. In the Navigator, click **Configuration** > **Migration**.
2. In the Migration page, click **Outgoing Create Migration Set**.
3. Click **Move All Changes**.
4. In the Create Configuration Set, enter an export name and an optional email address to receive notifications.
5. Select **Sales Orchestrations**. If your orchestrations use email templates and custom smart actions, then select **Email Templates** and **Smart Actions**.
6. You can select other modules, but these aren't related to orchestrations.
7. Click **Save and Close**.
8. Wait for the export process to complete and download the .jar file.

Import the Orchestrations in the Target Environment

1. Before importing, use the **Manage Administrator Profile Values** task in the Setup and Maintenance work area to do the following:

   o Check to make sure that the Generate Artifacts After Sandbox Publishing Enabled (ZCA_IMPORT_SB_PUBLISH_ARTIFACTGEN) profile option is set to Yes at the Site level. This setting regenerates object metadata after a sandbox publish.

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      ◦ If you're using a custom fixed-choice list field as either a Striping Field attribute or a Lifecycle Field attribute, then you must set the profile option Object Metadata Complete Generation Enabled (ORA_ZCA_OBJECT_METADATA_COMPLETE_GENERATION) to Yes at the Site level.

2. In the Navigator, click **Configuration** > **Migration**.
3. In the Migration page, click **Incoming Apply Migration Set**.
4. Click the **Upload Migration Set** link.
5. Click the **Choose File** button and select the exported file.
6. Click **Validate** to validate the file.
7. Click **Import** to import the file.
8. Optionally, click **Preview** when import to the sandbox is completed.
9. Click **Apply**.
10. Test the imported orchestrations.

Related Topics
- What do I do if I get an error on a custom fixed-choice list when importing orchestrations?

What do I do if I get an error on a custom fixed-choice list when importing orchestrations?

If you're creating an orchestration for a custom object, then that object's metadata must complete publishing before your orchestration import. If you receive an error about referencing an invalid fixed-choice list during orchestration import, this may mean the publishing process didn't complete before the orchestration import started. By default, the orchestration import polls the completion status of the metadata publishing for 5 minutes before giving you an error. You can increase that amount of time the import waits by creating and setting a profile option.

1. Navigate to **Setup and Maintenance** work area.
2. Open the Tasks side panel and click **Search**.
3. Search for and select the **Manage Profile Options** task.
4. From the Manage Profile Options page, click **Actions** > **New** .
5. Enter the following:
   - Profile Option Code: ZCA_ORA_ORCH_GEN_ARTIFACT_MAX_POLL_MINS
   - Profile Option Name = Maximum time in min to wait for completion of object-metadata artifact generation
   - Application: CRM Common
   - Module: Orchestration (LBA as CrmCommonOrchestration)
   - Description (optional): Time in minutes
   - Start Date: Any date in the past
6. Click **Save and Close**.
7. For the Site Profile Option Levels, select the Enabled and Updatable check boxes to enable.
8. Click **Save and Close**.
9. In the Setup and Maintenance work area, open the **Manage Administrator Profile Values** task:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values

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10. In the Manage Administrator Profile Values page, search by the profile option code: ZCA_ORA_ORCH_GEN_ARTIFACT_MAX_POLL_MINS.
11. Click the profile option name link.
12. On the Profile Values section, click **New** (the plus button).
13. Select **Profile Level** as **Site** and enter the time in minutes.
14. Click **Save and Close**.

Leads Orchestration Example

Here's an example of an orchestration that takes a lead through all of its stages, from Unqualified to Qualified and Converted, or from Unqualified to Retired.

Before you start:

- Create yourself as the principal contact for one of the accounts and enter your email address. This will allow you to receive emails.
- Think of a simple and short name that you will use as the name of the lead you will use for testing the orchestration. You can specify the name as the criteria for testing.

Basic Details

Here's what to enter in the Basic Details page:

- Name: <Enter an orchestration name. It displays only for setup.>
- Object: Sales Lead
- Condition: Include all of, Lead name, Equals, <Name of the lead you will use for testing>

Unqualified Stage

Here's the lead qualification process that the sample orchestration recommends for leads in the Unqualified status:

1. A salesperson starts by researching the available lead information.
2. They send an introductory email to the customer. This completes the **Contact Customer** objective.
3. The orchestration waits a day and then prompts the salesperson to call the customer and set up the discovery call appointment.
4. If the salesperson fails to reach the customer, then the orchestration automatically sends a follow-up email and suggests additional followup calls. If any of the followup calls succeeds, salespeople schedule the discovery call. (These failure steps are detailed in the *Unqualified Stage Failure Steps* section).
5. If none of the multiple attempts to reach the customer are successful, then the lead is automatically set to the Retired status and the orchestration proceeds to recommend the steps in the Retired orchestration stage.
6. When the salesperson ends the discovery call, they take notes and indicate if the outcome of the call was successful or not. This completes the **Discover Customer Interest, Budget Decision Makers, and Purchase Time Frame** objective.
7. If the outcome is set to successful, then:
    a. The salesperson is prompted to update the lead with any new information.
    b. They are prompted to qualify the lead. This completes the **Qualify Lead** objective.
    c. The salesperson then sends a hand-off email to field service.

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     d. And the lead is automatically set to Qualified status and the orchestration proceeds to recommend steps in the Qualified stage.

  8. If the outcome of the discovery call is anything other than successful, then the lead is automatically set to the Retired status and the orchestration proceeds to recommend steps in the Retired orchestration stage.

Here's a diagram that outlines the process:
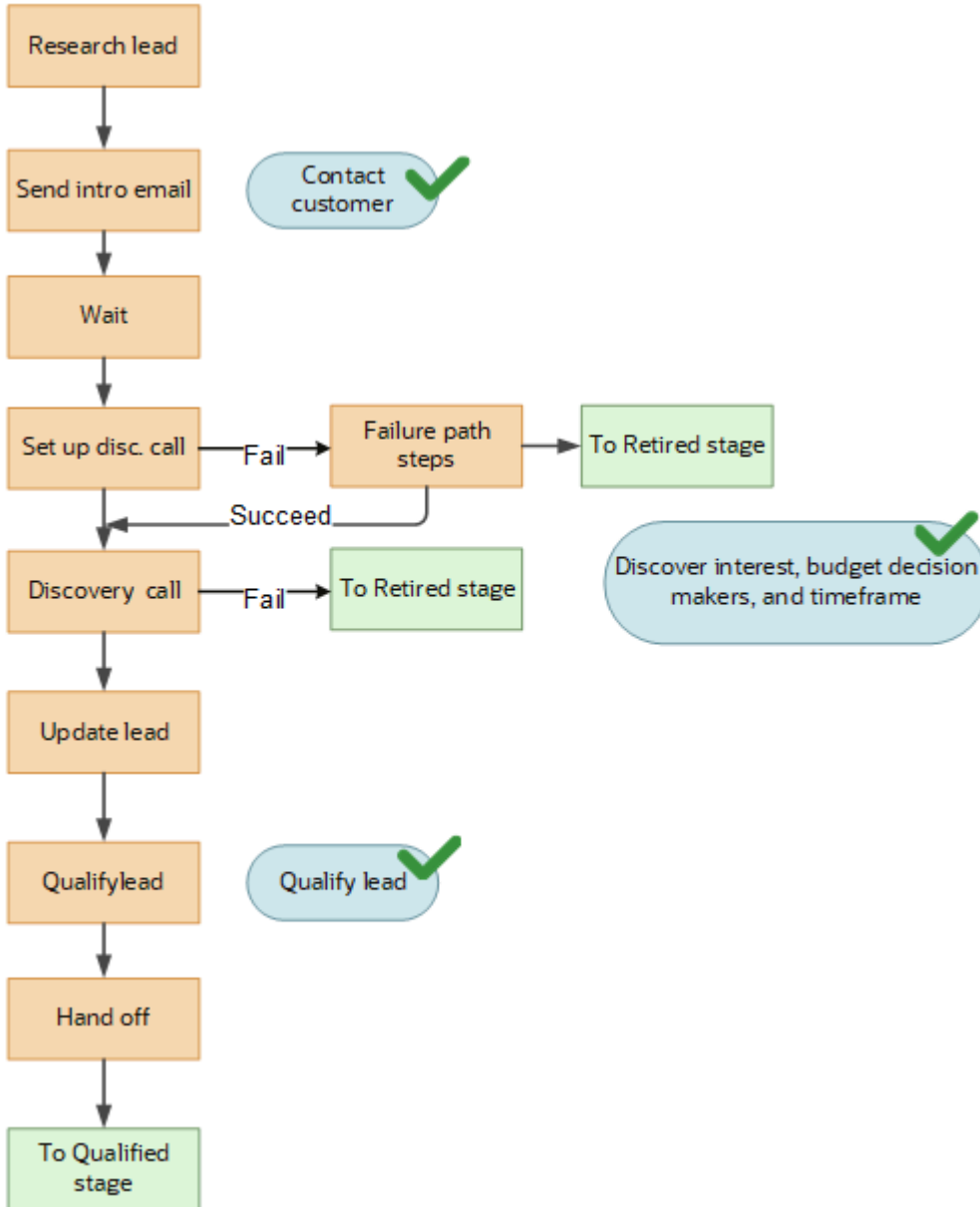
Start by adding objectives for this stage:

- Contact customer

  Objective Description: Contact the customer.

- Schedule discovery

  Objective Description: Schedule the discovery call.

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- Discover interest, budget decision makers, and time frame

  Objective Description: Discover customer interest, budget decision makers, and purchase time frame.

- Qualify the lead

  Objective Description: Qualify the lead.

Here's a summary of the setup for the Unqualified stage using the Diagram tab:

1. Add the **Task** step: **Send introduction email**
   - Add Step
     - Step Name: Send introduction email
     - Type: Task
     - Smart Action: Send Email
     - Suggestion Text: Send intro email to the prospect with collateral on product of interest, requesting time for a discovery call.
   - Edit Properties
     - Subject: Send introduction email
     - Type: E-mail
     - Due in Days: 1
     - Description: Send intro email to the prospect with collateral on product of interest, requesting time for a discovery call.
     - Add optional attachment.
     - Use Email Template: <select email template you created>
     - Receive Reply to Complete Step: Off
     - Grace Period to Complete: <optional up to 23 hours>
     - Success Criteria: Task status is completed. <The default>
     - Objective Completed: Contact customer
2. Add the **Wait** step: **Wait for discovery**
   - Add Step
     - Subject : Wait for Discovery
     - Suggestion Text: <leave blank as this doesn't show up anywhere in the run-time UI.>
   - Edit Properties
     - Wait Time in Days: <number of days to wait for the contact>
     - Enter number of hours from the previous step:: <number of hours>
     - Next Step on Success: <leave blank. This will be added automatically when you enter the next step.>

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3. Add the **Task** step: **Set up discovery call**
   - Add Step
     - Subject: Set up discovery call
     - Type: Task
     - Action: Call
     - Suggestion Text: Identify stakeholders and schedule discovery call.
   - Edit Properties
     - Subject: Setup discovery call
     - Type: Call
     - Due in Days: 1
     - Description: Identify stakeholders and schedule discovery call.
     - Sales Guide: <optional>
     - Grace Period to Complete: <optional and up to 23 hours>
     - Complete Objective: Schedule discovery

Here's how the first four steps appear in the Diagram tab.

4. Add a **Logic** node.
5. Click on the Failure path **Add** (Plus sign)
6. Add the **Wait to Follow Up** failure step, the first of the failure steps listed in the Unqualified Stage Failure Steps section.

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7. Add the **Appointment** step: **Discovery call**
    o Add Step
        - Step Name : Discovery call
        - Type: Appointment
        - Action: Start Web Conference
        - Suggestion Text: On the discovery call identify the following: project budget, key stakeholders and their roles, the need, and time frame for the purchase.
    o Edit Properties
        - Subject: Discovery call
        - Type : Web Conference
        - Start in Hours: 48
        - Duration in Minutes: 30
        - Description: On the discovery call identify the following: project budget, key stakeholders and their roles, the need, and time frame for the purchase.
        - Attachments if any.
        - Sales Guide: <select a sales guide if you have created one for the call>
        - Grace Period to Complete: <duration in hours up to 23>
        - Complete Objectives: Discover interest, budget decision makers, and timeframe
8. Optionally, you can modify the success criteria by editing the properties of the Logic node you added in step 5:
    o Edit Properties
        - Success Criteria: <You can use the default success criteria, or modify them.>
        - Next Step on Success: Discovery Call <already entered>
        - Next Step on Failure: Wait to follow up <already entered>
9. Add a **Logic** node to the Discovery Call step:

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10. Click **Add** (the round plus icon) to the right of the logic node to add the failure **Next Stage** step: **Retire lead**
- ○ Add Step:
  - - Step Name: Retire lead
  - - Type: Next Stage
  - - Suggestion Text: <leave blank>
- ○ Edit Properties
  - - Stage Name: Retired

Here's a section of the diagram showing the steps that you just built:
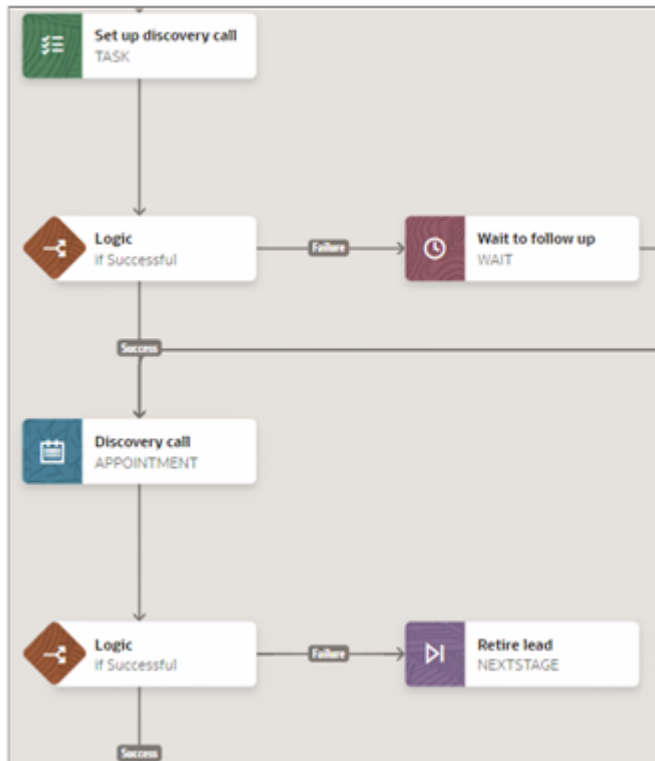
11. Add the **Task** step: **Update lead information** to the Logic node success branch.
- ○ Add Step
  - - Step Name: Update lead information
  - - Type: Task
  - - Action : Update Lead <Opens the Detail View of the leads>
  - - Suggestion Text: Update decision date, product of interest, and budget
- ○ Edit Properties
  - - Subject: Update lead information
  - - Type: Administration
  - - Due in Days: 1
  - - Description: Update decision date, product of interest, and budget
  - - Grace Period to Complete: 23 hours
  - - Complete Objectives: Discover interest , budget decision makers, and time frame

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12. Edit the properties of the **Logic** node you added to the **Discovery call** step. You want to specify that the discovery call is a success only when the salesperson selects Successful as the call Outcome.
    - ○ Edit Properties
        - Success Criteria
            - ○ Include all of
            - ○ Attribute: Outcome
            - ○ Operator: Equals
            - ○ Value: Successful
        - Next Step on Success: Update lead information <already filled in>
        - Next Step on Failure: Retire lead <already filled in>
13. Add the **Task** step: **Qualify lead**
    - ○ Add Step
        - Step Name: Qualify lead
        - Type: Task
        - Action : Qualify
        - Suggestion Text: Verify all info and qualify the lead.
    - ○ Edit Properties
        - Subject: Qualify lead
        - Type: Administration
        - Due in Days: 1
        - Description. Verify all info and qualify the lead.
        - Optional attachment.
        - Grace Period to Complete: 23 hours
        - Complete Objectives: Qualify the Lead
14. Add the **Task** step: **Hand off to field sales rep.**
    - ○ Add Step
        - Step Name: Hand off to field sales rep.
        - Type: Task
        - Action: Send Email
        - Suggestion Text: Email the field sales rep with lead details informing him with key findings.
    - ○ Edit Properties
        - Subject: Hand off to field sales rep.
        - Type: Administration
        - Due in Days: 1
        - Description: Email the field sales rep with lead details informing him with key findings.
        - Optional attachment.
        - Use Email Template: <select email template if you created one>
        - Receive Reply to Complete Setup is off.
        - Grace Period to Complete: 23 hours
        - Complete Objectives: <none>
15. Add the **Next Stage** step: **Go to qualified**
    - ○ Add Step
        - Step Name: Go to qualified
        - Suggestion Text: <Leave blank.>
    - ○ Edit Properties

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- Next Stage, Stage Name: Qualified

16. Add the remaining failure steps for the **Set Up Discovery Call Logic** node. (Starting with step 2 in the following section.)

Unqualified Stage Failure Steps

The steps in this section detail the remedial steps that get triggered when the salesperson isn't able to connect with the customer to set up the discovery call.

1. Add the **Wait** step: **Wait to follow up**
   - Add Step
     - Step Name: Wait to follow up
     - Suggestion Text: <leave blank>
   - Edit Properties
     - Wait Time from Previous Step: 1 day
     - Next Step on Success: <Leave blank when you create the next step this value gets populated with the Send Followup Email step automatically.>
2. Add the **Email Automation** step: **Send followup email**
   - Add Step
     - Step Name: Send followup email.
     - Type: Email Automation
     - Suggestion Text : <optional as this appears only during orchestration authoring.>
   - Edit Properties
     - Send Email to Contacts linked with the Lead where: Attribute: Do Not Mail, Operator: Is Null
     - Use Email Template: <select the email template you set up previously>
     - Receive Reply to Complete Step is off
     - Grace period to complete: <can leave blank>
3. Add the **Wait** step: **Wait for response**

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- ○ Add Step
  - - Step Name: Wait for response
  - - Suggestion text: <Leave blank>
- ○ Edit Properties
  - - Wait Time in Days: 1
  - - Next Step on Success: <Leave blank.>

Here's the portion of the failure path showing the steps you just created:
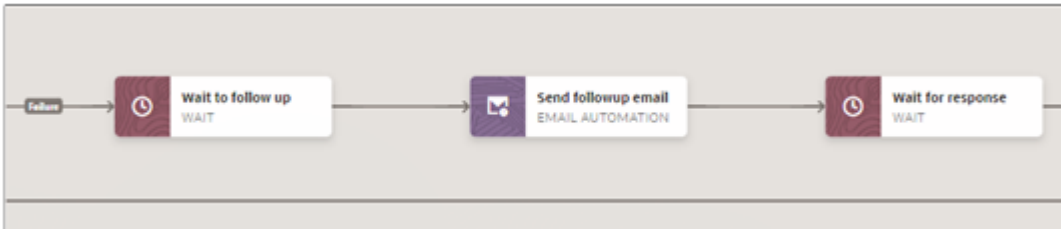
4. Add the **Task** step: **Check for Response 1**
   - ○ Add Step
     - - Step Name:: Check for Response 1
     - - Type: Task
     - - Action: <leave blank> (This is a manual task so there's no smart action. Salespeople will indicate this task is complete by clicking Complete)
     - - Suggestion Text: Check to see if the customer responded.
   - ○ Edit Properties
     - - Subject: Check for Response 1
     - - Type: Administration <or another task type you select. The task type shows up only on the task itself.>
     - - Due in Days: 1
     - - Description: Check to see if the customer responded.
   - - Optional attachment.
     - - Grace Period to Complete: <up to 23 hours>
     - - Complete Objectives: <Leave blank>
5. Add a **Logic** node to the **Check for Response 1** step.
6. Click **Add** (the plus sign) for the **Logic** node and add the next failure step: **Task**: **Call for discovery availability 2**
   - ○ Add Step:
     - - Step Name: Call for discovery availability 2
     - - Type: Task
     - - Action: Call
     - - Suggestion Text: Call to see if you can reach the customer. This is the second call after a follow-up email was sent.
   - ○ Edit Properties:
     - - Subject: Call for discovery availability 2
     - - Type: Administration
     - - Due in Days: 1
     - - Description: Call to see if you can reach the customer. This is the second call after a follow-up email was sent.

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- - Optional attachment.
  - Sales Guide: <select if you have created one>
  - Grace Period to Complete: <up to 23 hours>
  - Complete Objectives: <none>
7. Edit the properties for the **Logic** node you added for **Check for response 1** step:
    - ○ Edit Properties
        - Next Step on Success: select Discovery Call. <This links you back to the success path and enables you to enter additional success criteria if needed.>
        - Success Criteria: <you can change these default success criteria>
            - ○ Include all of
            - ○ Attribute: Status
            - ○ Operator: Equals
            - ○ Value: Complete
        - Next Step on Failure: Call for discovery availability 2

Here's a screenshot of the steps you just created on the Diagram tab:
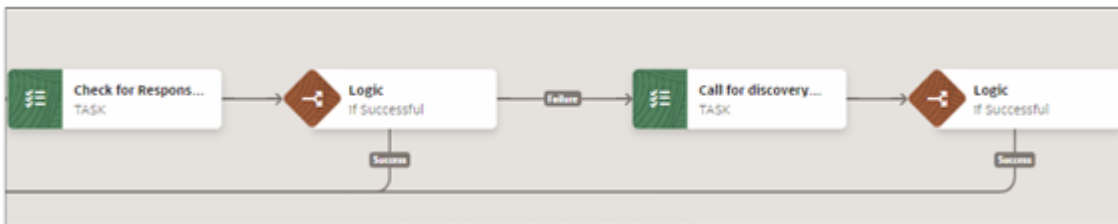
8. Add a **Logic** node to the step **Call for discovery availability 2**.
9. Click **Add** (the plus sign) for the Logic node and add the next failure step, the **Wait** step: **Wait for 1 day**:
    - ○ Add Step
        - Step Name: Wait for 1 day
        - Suggestion Text: <Leave blank>
    - ○ Edit Properties
        - Wait Time from Previous Step: 1 day
        - Next Step on Success: <leave blank>
10. Edit the properties for the **Logic** node you added to the step **Call for discovery availability 2**:
    - ○ Edit Properties
        - Next Step on Success: select Discovery Call. <This links you back to the success path and enables you to enter additional success criteria if needed.>
        - Success Criteria: <you can change these default success criteria>
            - ○ Include all of
            - ○ Attribute: Status
            - ○ Operator: Equals
            - ○ Value: Complete
        - Next Step on Failure: Wait for 1 day
11. To the step **Wait for 1 day** step add the **Task** step: **Followup call 3**
    - ○ Add Step:
        - Step Name: Followup call 3
        - Type: Task

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- - Action: Call
  - - Suggestion Text: Last followup call before lead is retired.
  - ○ Edit Properties:
    - - Subject: Followup call 3
    - - Type: Call
    - - Due in Days: 1
    - - Description: Last followup call before lead is retired.
    - - Optional attachment.
    - - Sales Guide: <select if you have created one>
    - - Grace Period to Complete: <up to 23 hours>
    - - Complete Objectives: <none>
12. Add a **Logic** node to step **Followup call 3**.
13. Click **Add** (the plus sign) for the Logic node and add the last failure step, **Next Stage**: **Retire Lead**
    - ○ Add Step:
      - - Step Name: Retire lead
      - - Type: Next Stage
      - - Suggestion Text: <leave blank>
    - ○ Edit Properties
      - - Stage Name: Retired
14. Edit the properties of the **Logic** node you added to the step **Follow-up call 3**:
    - ○ Next Step on Success: select Discovery Call. <This links you back to the success path and enables you to enter additional success criteria if needed.>
    - ○ Success Criteria: <you can change these default success criteria>
      - - Include all of
      - - Attribute: Status
      - - Operator: Equals
      - - Value: Complete
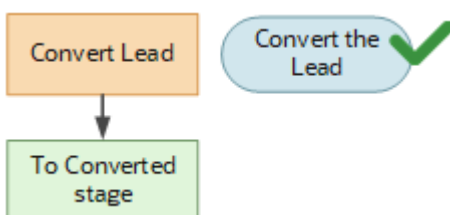   - ○ Next Step on Failure: Retire lead
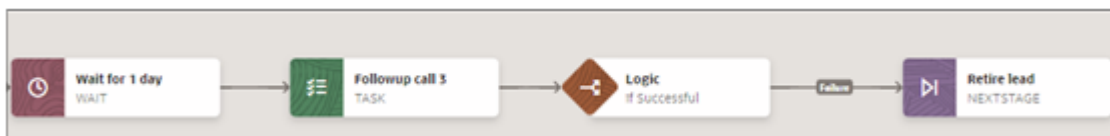
Qualified Stage

In this stage:

1. The salesperson coverts the lead to an opportunity by clicking on the Convert Lead button.
2. This completes the Covert the Lead objective.
3. The lead is automatically set to the Converted status.

Here's a diagram of the process:

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Add the objective:

- Objective Name: Convert the lead
- Objective Description: Convert the lead.

1. Add the **Task** step: **Convert the lead**
   - Add Step
     - Step Name: Convert the lead
     - Type: Task
     - Action: Convert
     - Suggestion Text: Verify all information and convert lead.
   - Edit Properties
     - Subject: Convert the lead
     - Type: Administration
     - Due in Days: 1
     - Description: Verify all information and convert lead.
     - Optional attachment.
     - Grace Period to Complete: 23 hours
     - Complete Objectives: Convert the lead
2. Add the **Next Stage** step: **Go to Converted**
   - Add Step
     - Subject: Go to Converted
     - Suggestion Text: <leave blank>
   - Edit Properties
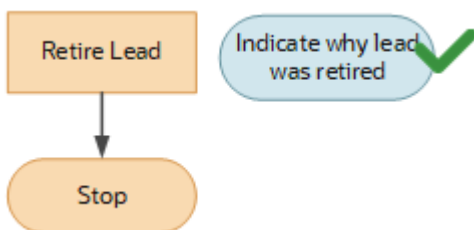   - Next Stage, Stage Name: Converted

Converted Stage

The orchestration stops. No objectives are required as there are no actions by the salesperson.

- Add the **Stop** step: **Stop**
  - Add Step
    - Step Name: Stop
    - Suggestion Text: <Leave blank>

Retired Stage

In this stage:

1. The salesperson retires the lead by noting in a task why the lead was retired.
2. This completes the objective: Indicate why lead was retired.
3. The orchestration comes to a stop.

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Add objective:

- Objective Name: Indicate why lead was retired.

- Objective Description: Indicate why lead was retired.

1. Add **Task** step: **Retire lead**
   - o
     - - Subject: Retire lead
     - - Type: Task
     - - Action: Retire
     - - Suggestion Text: Retire the lead with adequate description of reasons.
   - o Edit Properties
     - - Subject: Retire lead
     - - Type: Administration
     - - Due in Days: 1
     - - Retire the lead with adequate description of reasons.
     - - Optional attachment.
     - - Grace Period to Complete: 23 hours
     - - Complete Objectives: Indicate why lead was retired
2. Add **Stop** step: **Stop**
   - o Add Step
     - - Step Name: Stop
     - - Suggestion Text: <leave blank>

Orchestration Lookups

Lookups enable quick selection from drop-down lists and are incorporated into the orchestration capability to speed the process of entering data into forms. They are also used in applications to represent a set of codes and their translated meanings.

For example, a product team might store the values 'Y' and 'N' in a column in a table. When displaying those values, they would want to display "Yes" or "No" (or their translated equivalents) instead. Each set of related codes is identified as a lookup type.

This table displays orchestration lookup names (called lookup types in the application), their values, and their descriptions.

Lookup Type	Lookup Values	Description
Orchestration Object Association Runtime Status (ORA_ZCA_ORCH_ASSOC_RT_STATUS)	• Active • Completed • Exited	Specifies the runtime status of the orchestration object association.
Orchestration Process Status (ORA_ZCA_ORCH_DT_STATUS)	• Active • Archive • Draft	Specifies the status of the orchestration process.

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Lookup Type	Lookup Values	Description
Orchestration Process Type (ORA_ZCA_ORCH_DT_TYPE)	• Guidance Builder • Guided Selling	Specifies the type of the orchestration process.
Orchestration Stage Objective Runtime Status (ORA_ZCA_ORCH_STG_OBJ_RT_STATUS)	• Canceled • Completed • Pending • Skipped	Specifies the runtime status of the orchestration stage objectives.
Orchestration Stage Objective Status (ORA_ZCA_ORCH_STG_OBJ_DT_STATUS)	• Mapped • New	Specifies the objective status of the orchestration stage.
Orchestration Stage or Step Runtime Status (ORA_ZCA_ORCH_STG_STP_RT_STATUS)	• Canceled • Completed • In Progress • Not Started • Skipped	Specifies the runtime status of the orchestration stage or step.
Orchestration Step Execution Method (ORA_ZCA_ORCH_STP_DT_EXECMETHD)	• Automatic • Manual	Specifies the execution method of the orchestration step.
Orchestration Step Transition Runtime Status (ORA_ZCA_ORCH_STPTRNS_RT_STATUS)	• Canceled • Completed • In Progress • Not Started • Skipped • Waiting	Specifies the runtime status of the orchestration step transition.
Orchestration Step Type (ORA_ZCA_ORCH_STEP_DT_TYPE)	• Appointment • Field Update • Groovy • Next Stage • Stop • Task • Wait	Specifies the type of the orchestration step.

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