Oracle Fusion Cloud Sales Automation

How do I get started with Oracle Sales in the Redwood User Experience?

Oracle Fusion Cloud Sales Automation
How do I get started with Oracle Sales in the Redwood User Experience?

G10658-02

Author: Jiri Weiss, Carmen Myrick, Brian Casey

Contents

Get Help

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

Get Help in the Applications

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

Get Support

You can get support at *My Oracle Support*. For accessible support, visit *Oracle Accessibility Learning and Support*.

Get Training

Increase your knowledge of Oracle Cloud by taking courses at *Oracle University*.

Join Our Community

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

Learn About Accessibility

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

Share Your Feedback

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

You can email your feedback to *oracle_fusion_applications_help_ww_grp@oracle.com*.

Thanks for helping us improve our user assistance!

1 Introduction

Who This Guide is For

Welcome to Oracle Sales in the Redwood User Experience (Sales in the Redwood UX)!

This guide is for customers implementing Sales in the Redwood UX for the first time.

If you're an existing customer who hasn't yet upgraded to the latest "fragments" release, then simply ensure that both the **Digital Sales Next Gen UI** and **Sales in the Redwood UX** features in the Sales offering are checked. This step is covered in *Enable Sales in the Redwood UX*.

Overview of Oracle Sales in the Redwood User Experience

Oracle Sales in the Redwood User Experience (Sales in the Redwood UX) gives you access to a rich set of features that make life easier for sales teams.

The following sections highlight some of the key capabilities of Oracle Sales in the Redwood User Experience (Sales in the Redwood UX). Here are some more places where you can find documentation and training specifically geared toward Sales in the Redwood UX:

- **Sales Solution Playbooks:** Visit the *Oracle Sales Playbooks page* on Oracle Help Center. Browse the offerings available for Sales in the Redwood UX, including:
  - Extending the application using Oracle Visual Builder Studio
  - Integrating Sales with Oracle CPQ for a complete revenue transformation solution
  - Adding the Microsoft Outlook add-in and the Mobile app to your Sales tools
  - Setting up and using Sales Forecasting in the Redwood UX
  - Configuring the Sales dashboard
  - Integrating with Microsoft Teams for collaboration abilities
- **Sales Training Videos:** Sign in to *Oracle Customer Connect* to access a multitude of the latest informational and training videos about Sales in the Redwood UX, including:
  - Overviews of Sales in the Redwood UX
  - Extending the application using Oracle Visual Builder Studio
  - Integrating with the latest Oracle Forecasting offering
  - Adding the Microsoft Outlook add-in and the Mobile app to your Sales in the Redwood UX solution

Oracle Sales in the Redwood User Experience Key Capabilities

Find out more about Oracle Sales in the Redwood User Experience (Sales in the Redwood UX):

- Connects sellers and buyers strategically across the entire purchasing and renewal lifecycle.
- Provides a holistic view of the B2B buyer relationship to ensure seller success.
- Improves sales execution with connected sales and purchasing data and flows.
- Accelerates user adoption and CRM impact with full relationship and enterprise context in one place.
- Improves the impact and usefulness of CRM by providing the complete buying journey context in a single view.
- Interacts with users in a conversational way on their choice of user interfaces (mobile, desktop, collaboration).
- Automates tedious CRM management tasks.
- The transformational UX helps salespeople and managers sell better through a combination of context relevance, intelligence, and automation.
- Operates the business at speed and scale with a common platform and infrastructure and continuously delivered upgrades and innovations.
- Orchestrates clear, connected paths to success for sellers and their managers..
- Orchestrations guide salespeople through best sales practices for different sales situations to keep their deals moving ahead.
- Minimizes the risk of failure with complete embedded sales intelligence in every sales experience.
- Native AI-derived insights give prescriptive guidance that combines data excellence with machine learning to further enhance the sales experience.
- Always contextual: Important customer history combined with real-time details are front and center so sellers can always act quickly and confidently.
- Always actionable: Not only can sellers access all the key information they need to act, they can take those actions in context without leaving their current view in the application -- whether that's sending an email, updating a quote, or monitoring a service request.
- Prescriptive and proactive: AI and machine learning derived insights help sellers prioritize and focus on the right actions at the right time in order to optimize results.
- Automated and time-saving: The system is designed to remove the burden of data entry and record keeping while automating key tasks and followups to keep sellers on track.

Sales Dashboard

The Sales Dashboard lets you see key sales performance metrics and key performance indicators (KPIs) that provide quick and easy-to-understand overviews of a sales team's to-do list and pipeline. Sales team members and managers can review items that need immediate attention, such as upcoming appointments and overdue tasks.

For more information, see the playbook, *How do I configure the Oracle Sales Dashboard in the Redwood User Experience?*

Fold-Out Panel

The fold-out panel that displays for all top-level business objects provides a dynamic UI. Objects like Accounts, Contacts, Activities, and Opportunities are available with just a click.

Action Bar

If users have a question, need to get a task done, or need to navigate somewhere in the app, they just ask the action bar.

Activity Stream

The scrollable, news-feed style activity stream tracks sellers' communications, tasks, and updates for a record.

Personalization

Easily personalize the apps with user-friendly saved searches and options for managing data.

Orchestration

Orchestrations guide salespeople through best sales practices for different sales situations to keep their deals moving ahead. See the playbook, *How do I get started with Orchestration?*, for more information.

2 Prepare

What do I do after I get my welcome email?

Got the welcome email? Here's what to do next: When your environment is ready, Oracle sends an email to your service administrator. This email includes the link to your service, a temporary password, and instructions on how to access the Service Administrator Action List.

Who's My Service Administrator?

- The service administrator is the person designated as the administrator when you signed up with the service.
- You must follow the instructions in the Service Administrator Action List before signing in for the first time.

Sign In for the First Time

When you sign in for the first time, reset your password:

1. Click **your user initials** in the global header on the Welcome page.
2. In the Settings and Actions menu, select **Set Preferences**.
3. Click the **Password** link and reset your password.

Setup Checklist

Here are the high-level, initial steps to get started implementing Sales in the Redwood UX:

Step and Description	Where to Find More Information
Step 1 Before you sign in for the first time, complete the actions listed in the Service Administrator Action List provided by Oracle, and create your account with *My Oracle Support*.	See: *What to Do After You Get Your Welcome Email*
Step 2 If you haven't done so already, sign in and reset your temporary password. You click the user initials in the global header on the Welcome page, and select **Set Preferences** from the menu.	See: *What to Do After You Get Your Welcome Email*
Step 3	See: *Enable Sales and Service Offerings and Functional Areas*

Step and Description	Where to Find More Information
Enable the Sales and Service offerings for implementation. The Service offering includes tasks required to set up the telephony integration for Sales.	
Step 4 Request installation of the Oracle Spectra platform. Enable Sales in the Redwood UX. Sales in the Redwood UX relies on the Oracle Spectra platform.	Contact your *Oracle Support representative* at the earliest convenience to get the Spectra platform enabled in your environment. See: *Enable Sales in the Redwood UX*
Step 5 Run the Setup Assistant	See: *Overview of the Setup Assistant* and *Run the Setup Assistant*
Step 6 Select the business objects enabled for Oracle Adaptive Search	See: *Configure Adaptive Search and Workspace*
Step 7 Enable Access Groups	See: *Enable Access Groups*
Step 8 Enable the Activity Stream	See: *Enable the Activity Stream*
Step 9 Create implementation (setup) users to help with the implementation; optionally, give more setup users permissions to see all scheduled processes	See: *Create Implementation (Setup) Users* and *Give Setup Users Permissions to See All Scheduled Processes*
Step 10 Create sales resources (users)	See: *Concepts for Creating Sales Resources* and *Create Sales Users*
Step 11 Import more sales resources	Start with: *Overview of Sales User Import*
Step 12 Review the Accounting Calendar setup	See: *Overview of the Accounting Calendar in Sales* and *Create and Review the Accounting Calendar*
Step 13 Review your Geographies setup	See: *Overview of Geographies* and *Import Geography Reference Data*

3 Complete Initial Setups

Overview of the Setup Assistant

The Setup Assistant takes care of many setups in Oracle Sales. After you enter some information, the assistant runs processes that complete *many of the initial setups* for you.

Note: If you're an existing customer, you probably already completed the setups that the assistant does for you.

This table shows the steps to automate your initial setups with the Setup Assistant:

Step and Description	Where to Find More Information
Step 1 Gather the required information. Descriptions are available in the Setup Assistant wizard itself and in the Excel spreadsheet you can download. Run Setup Assistant after you enter the data directly in the Setup Assistant UI or imported the data from the spreadsheet.	See: *Run the Setup Assistant*
Step 2 If you enabled Forecast by Opportunity Owner in the Setup Assistant, then you must complete a one-time manual setup required internally by the application: enable a sales territory dimension even though you aren't using any dimensions.	See: *Complete One-Time Manual Step If You Enabled Forecast by Opportunity Owner*

CAUTION: You can run Setup Assistant up to five times to add information, but you can't use it to change much of what you entered the first time around. For example, on subsequent runs you can't update the company information, the accounting calendar periods, the root of your sales catalog, or the person you assign to the top of the resource hierarchy. You must use manual setup tasks to make these corrections.

Watch video

You can use Setup Assistant for Sales stand-alone implementations and for implementations after you're already implemented other Oracle Fusion Cloud applications.

What the Setup Assistant Completes for You

This table summarizes the information you enter in the Setup Assistant, what it does for you, and what other tasks you must complete in the application itself.

Setup Assistant Sections, Entries, and Actions	Where to Find More Information
Company Information You enter the company name, street address, country, and the corporate currency. The Setup Assistant creates the rudimentary enterprise structure required for Oracle Fusion Cloud applications.	See:
Accounting Calendar Based on your entries, the Setup Assistant creates the periods for your sales forecasts, quotas, and reports.	See: *Overview of the Accounting Calendar in Sales*
Geographies You can import reference geography data for countries where you do business, and you can enable the countries for address mapping. You can import more countries in later runs. You can set up UI validation for Sales UIs and import more countries using the Manage Geographies setup task.	See: *Overview of Geographies*
Top of the Sales Resource Hierarchy You enter the name, email address, and resource organization name of the Chief Executive Officer. Even if the CEO never uses your sales application, having them at the top of the hierarchy makes it easier for you to build the rest of the resource hierarchy underneath. Sales creates the resource hierarchy from the resource organization hierarchy, so you must enter a resource organization name for every manager. The resource organization name doesn't have to correspond to any actual organization, so for the CEO you can enter the company name. Both the CEO's name and the resource organization name appear in the sales resource directory, so make sure you enter them the way you'd like them displayed to the sales organization. The application sends email notifications to users when their accounts are created. If you don't want to spam the CEO, enter a dummy email address. You can't update this information in Setup Assistant on later runs.	See: • *Overview of Sales User Import* • *Create Sales Users in the UI*

Setup Assistant Sections, Entries, and Actions	Where to Find More Information
After creating the CEO, you must import the rest of the users or create them manually in the UI.	
Sales Catalog Root Product Group The assistant creates the top node of your Sales Catalog. It also creates all the prerequisites for creating products, including UOMs. You can't update this information in Setup Assistant on later runs. You must create the rest of the catalog in Sales, either in the UI or using import. You might also need to create more UOMs. For example, the application creates **`Unit`**, but not **`Each`**. To let salespeople use Each for entering products in opportunities, then you must create the UOM using the task, Manage Units of Measure.	See: • *Overview of Sales Catalog Setup* • *Review Units of Measure for Products*
Resource Roles and Role Mappings Your entries in the assistant can create additional resource roles and the accompanying role-provisioning rules. For example, if your sales organization includes sales support agents, you enter the resource role name here and select the job role you want to provision to salespeople with that title. The assistant creates the accompanying role-provisioning rule automatically. You can add more resource roles on later runs. You can also create more resource roles and role-provisioning rules manually.	*How Setup Assistant Gets You Ready to Create Sales Users*
Opportunities Set the default sales method to guide salespeople through the sales process. Unless you create more sales methods ahead of time, you can only select one of the two predefined sales methods: standard or accelerated. You can edit the names of sales stages for the selected sales method, add new ones, or reorder them. By default, salespeople must enter both win or loss reasons and the primary competitors when they close an opportunity in the UI. When salespeople	*Setup Assistant and Opportunities*

Setup Assistant Sections, Entries, and Actions	Where to Find More Information
open opportunities, the application automatically enters a default close date for the opportunity that's 20 days after the opportunity creation date. You can change these defaults. You must complete these steps outside the assistant: opportunity statuses, win/loss reasons, and more sales methods.	
Competitors You can create the competitors salespeople can enter when closing lost opportunities. In the assistant, you enter the basics, such as organization size, line of business, and threat level. You can create more competitors on later runs or you can create them in the Sales Competitors work area. Note that you can set a profile option to make entering competitors required when an opportunity gets closed.	*Review the List of Competitors and Create Additional Ones*
Setup Users Create other users to help you with setup. The application automatically notifies setup users by email that their accounts are created and allows them to set their passwords. The user names are set to the email address by default. You can create additional setup users on subsequent runs. You can also create additional setup users in the UI, using the Manage Users task.	*Create Setup Users*
Forecast by Opportunity Owner If individual salespeople in the sales organization own all of their opportunities and forecast them up the management chain, then select this option. Don't select this option if your organization uses geography, product, industry, or other territory dimensions to assign salespeople to opportunities. You must instead set up forecasting. You can't change the setting after your initial assistant run. You select the option in the assistant and then enable a sales territory dimension as described in the topic: *Complete One-*	• *Run Processes to Complete Resource and Resource Hierarchy Creation* • *Run the Refresh Territories from Resources Process* • *Overview of Sales Territory and Assignment Setup* • *Overview of Forecasting Setup*

Setup Assistant Sections, Entries, and Actions	Where to Find More Information
Time Manual Step If You Enabled Forecast by Opportunity Owner. This manual setup is required internally by the application even though you're not using territory dimensions. You must run several processes to update both the resource and sales territory hierarchies after you create and import users: • Send Pending LDAP Requests • Update Person Search Keywords • Reporting Hierarchy Generation • Synchronize User GUID • Refresh Territories from Resources process	
Adaptive Search Adaptive Search powers all Sales in the Redwood UX search. Select all of the sales objects you want to enable for Adaptive Search. You can't enable more objects in Setup Assistant in later runs. The assistant runs the required indexing process and schedules an hourly index refresh (the equivalent of running a full publish for Adaptive Search). You can make more fields searchable in Adaptive Search. You can also enable more objects for use with REST APIs and other products using the Configure Adaptive Search task in Setup and Maintenance.	• *Setup Assistant and Search* • *Overview of Optional Setup for Adaptive Search* • *Make Additional Fields Searchable*

Run the Setup Assistant

You can use Setup Assistant to set up a stand-alone sales implementation or to implement sales after you've already set up another Oracle Fusion Cloud application. The steps to run the assistant are different for each scenario.

- *Stand-Alone Sales Implementation*: This means you're using only Oracle Sales.
- *Sales Plus Another Oracle Fusion Cloud Application*: This means you're using Oracle Sales and another Oracle Fusion application.

To run Setup Assistant, you must have the following job roles:

- Application Implementation Consultant
- Application Diagnostics Administrator

- IT Security Manager

CAUTION: Make sure that the required information you enter is correct before clicking the Submit button for the first time.

Stand-Alone Sales Implementation

Here's how to use the Setup Assistant to set up Sales as a stand-alone application in a new environment.

1. Sign in as the initial user provided by Oracle.
2. In Setup and Maintenance, go to the **Setup Assistant** task: **Offering: Sales** > **Functional Area: Company Profile**.
3. On the Setup Assistant page, click **Use Excel Spreadsheet** to download a spreadsheet for collecting data offline, or click **Use Application** to enter the data directly. Both the spreadsheet and the application include the same basic instructions.

   Note: The Excel spreadsheet is provided in English only. However, you can enter data in any of the supported languages.

   If you used the spreadsheet to collect your data, you must upload the data into the Setup Assistant. Here's how:
   a. Click **Create Import File** in the spreadsheet and save the file to your desktop.
   b. In the Setup Assistant, upload the file.
   c. Click **Import Data**.
4. Enter and verify the information in the assistant.

   Note: You can make changes until you run the setup process from the last setup page.
5. Click **Run Setup Process** and monitor the process progress by clicking **Refresh**.

   The process takes about 5 minutes to complete. Contact Oracle Support if you run into errors. Common errors involve web service time-outs, so you can also try running the process again to see if that fixes the error.
6. You can add more data and run the process as many as five times by clicking **Load More Data**. You can use these later runs to create more setup users, import geographies for more countries, add competitors, add resource roles, and so on. After each iteration, you can click **View Setup History** to review the changes you made in your last run.

Sales Plus Another Oracle Fusion Cloud Application

Here's how you can use the Setup Assistant if you're implementing sales after you've already set up another Oracle Fusion application, such as HCM.

1. Sign in as the initial user provided by Oracle.
2. In Setup and Maintenance, go to the **Setup Assistant** task: **Offering: Sales** > **Functional Area: Company Profile**.
3. On the Setup Assistant page, click **Sales Setup Status**.
4. Click **Rerun Status Check**.
5. The Sales Setup Status page lists the setups already completed in the environment and provides recommendations for those steps that you must complete either in the Setup Assistant or elsewhere in the application. After you review the report, click **Cancel**.
6. Click **Use Application** and enter missing information in the Setup Assistant. You can make changes until you run the setup process from the last setup page.
7. Click **Run Setup Process** and monitor the process progress by clicking **Refresh**.

8. You can add more data and run the process as many as five times by clicking **Load More Data**. You can use these later runs to create more setup users, import geographies for more countries, add competitors, add resource roles, and so on. After each iteration, you can click **View Setup History** to review the changes you made in your last run.

Enter Company Information and Currency

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

> **Note:** To understand the what the Setup Assistant does for you in your implementation, see *Overview of the Setup Assistant*.

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

- Creates the rudimentary enterprise structures required for sales.

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

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

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

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

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

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

   > **Note:** Except for the currency, the information you enter doesn't appear anywhere in Sales. The currency you select becomes the default currency in Sales transactions.

Field	Description
Enterprise Name	The name you entered. You can't change this information using the Setup Assistant in later runs.
Address	The street address you entered.
Legal Entity	The enterprise name followed by the letters **LE**.
Business Unit	The enterprise name followed by the letters **LE BU**.
Initial User	Name of the user who's signed in.
Corporate Currency	By default, the corporate currency is US Dollar. You can select a different corporate currency. To change the corporate currency after you run Setup Assistant for the first time, use the Quick Setup for the Company Profile functional area in the Sales offering.

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

Complete One-Time Manual Step If You Enabled Forecast by Opportunity Owner

If you enabled Forecast by Opportunity Owner in the Setup Assistant, then you must complete a one-time manual setup required internally by the application: you must enable a sales territory dimension even though you aren't using any dimensions. Here's how:

1. Open the task **Enable Dimensions and Metrics** from the Setup and Maintenance work area by going to: **Sales offering** > **Territories functional area** > **Enable Dimensions and Metrics task**.
2. On the Enable Dimensions and Metrics page, click **Edit**.
3. In the Dimensions region, click **Select and Add**.
4. Select **Account Type** and click **OK**.
5. From the Actions menu at the page level, select **Load and Activate**.
   Your selection runs a process that loads the required data.

You can select **Refresh Status** from the Actions menu at the page level to monitor the process progress. When the process completes successfully, you're done.

For information about how to implement Sales Forecasting in the Redwood UX, see the *How do I get started with Sales Forecasting?* playbook on the *Oracle Help Center Sales Playbooks* page.

Enable Sales and Service Offerings and Functional Areas

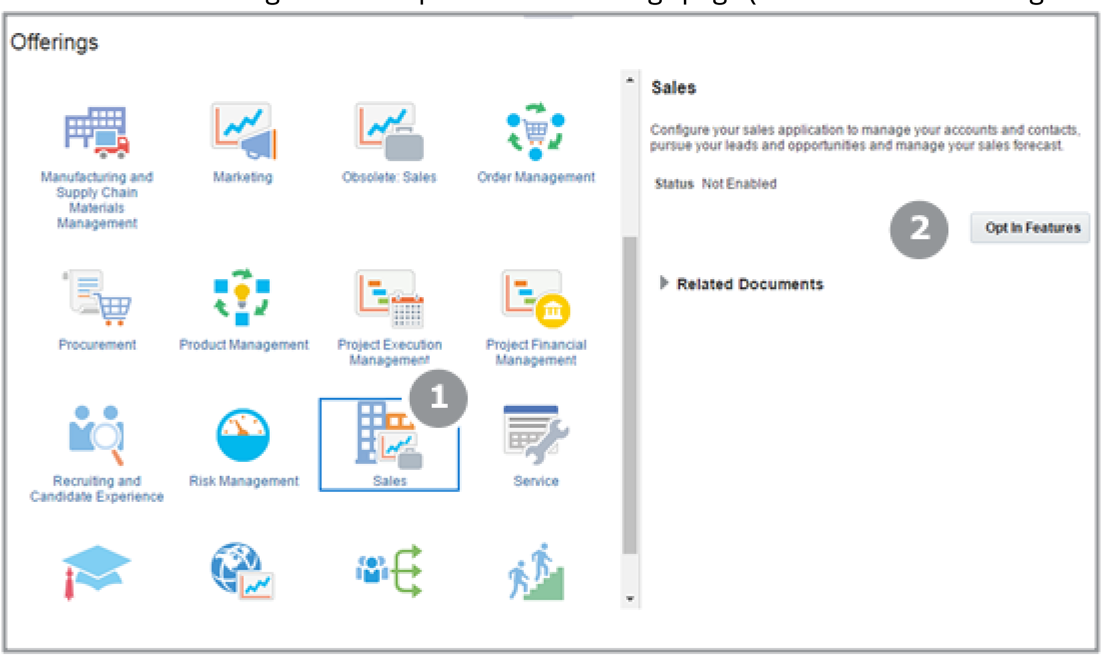
You need to enable the Oracle Sales and Oracle Fusion Service offerings and the functional areas you're implementing. Enabling the offerings and their functional areas provides access to setup tasks and displays icons in your application. You can always enable more functional areas later.

Note: Although you're setting up Sales, you must enable Service to run Computer Telephony Integration (CTI).

Enable the Sales Offering

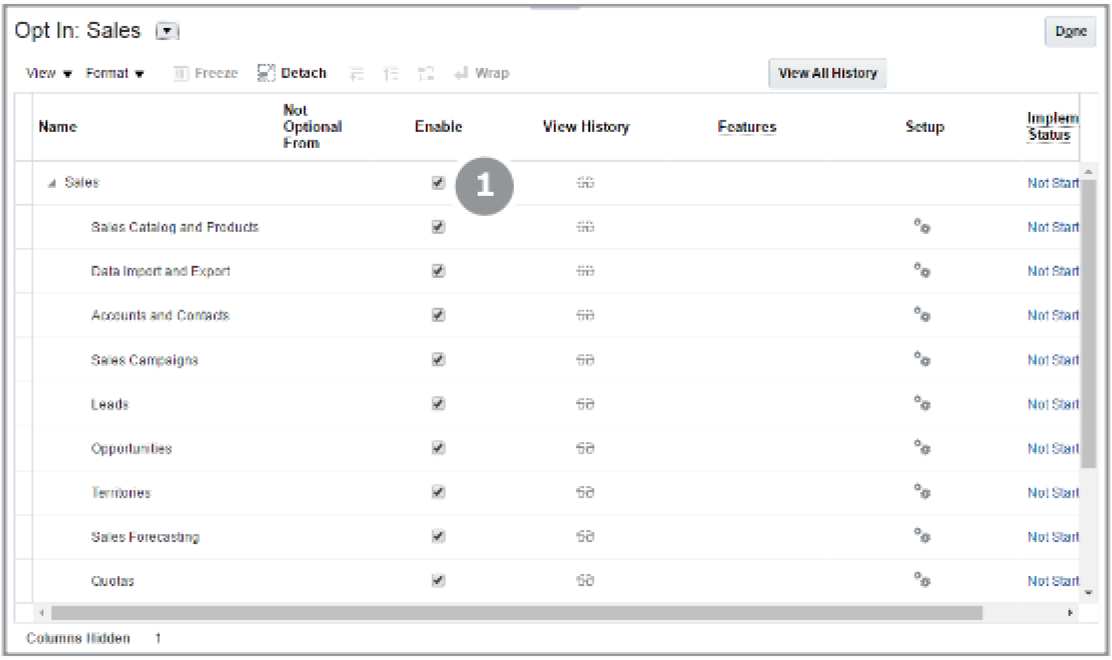
Here's how you enable the Sales offering:

1. In the Navigator, click **My Enterprise** > **Offerings**.
2. Click the **Sales** offering icon in the pane of the Offerings page (callout 1 in the following screenshot).



3. Click **Opt In Features** (callout 2 in the preceding screenshot).

4. On the Opt In: Sales page, select the **Enable** option for the top-level **Sales** folder (callout 1 in the following screenshot). Your selection enables the offering.



> **Note:** If you enabled other offerings, you might need to select **Sales** from the **Opt In:** list. That's because the offerings are listed in alphabetic order.

5. Select the **Enable** option for all of the Sales functional areas you're using.
6. Click **Done**.
7. Back in the Offerings page, click **Home** in the global header to return to the Welcome page.

Enable the Service Offering

1. In the Navigator, click **My Enterprise** > **Offerings**.
2. Click the **Service** offering icon in the Offerings page.
3. Click **Opt In Features**.
4. In the Opt In: Service page, select the **Enable** for the top-level **Service** folder.
5. In the Opt In: Service page, click the **Redwood User Interface for Service** option.
6. Select the **Enable** option for all of the Service functional areas you're using.
7. Click **Done**.
8. Back in the Offerings page, click **Home** in the global header to return to the Welcome page.

Enable Sales in the Redwood UX

If you're a new customer, then the latest version of Sales in the Redwood UX is already enabled for you. If you're an existing customer, then simply ensure that both the **Digital Sales Next Gen UI** and **Sales in the Redwood UX** features in the Sales offering are checked.

> **Note:** Sales in the Redwood UX relies on the Oracle Spectra platform. Spectra simplifies the development, delivery, and operation of SaaS applications and services at Oracle. Contact your Oracle Support representative at the earliest convenience to get the Spectra platform enabled in your environment.

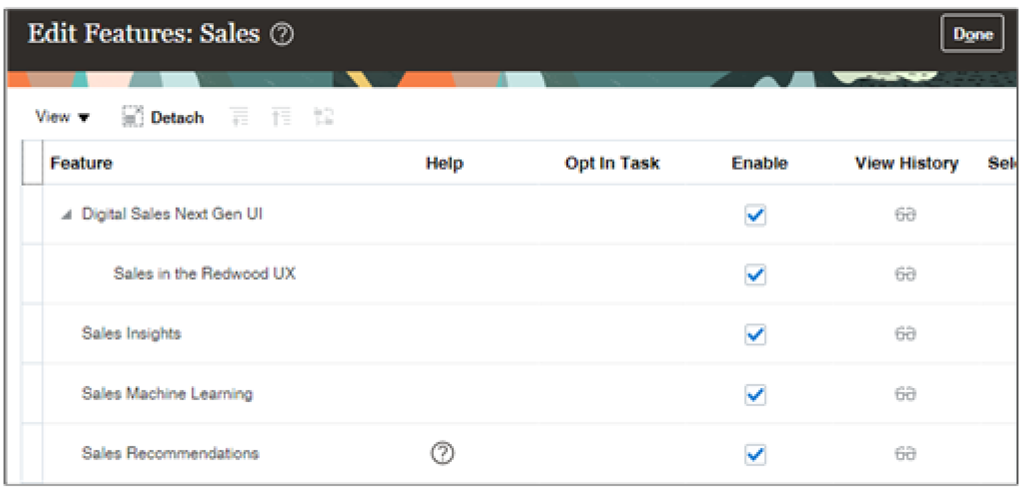
Here are the steps to enable Sales in the Redwood UX if you're an existing customer updating to the latest version:

1. Sign in as a setup user and open the **Setup and Maintenance** work area.
2. In Setup and Maintenance, display the **Sales** offering.
3. From the **Actions** menu, select **Change Feature Selection**.
4. In the Edit Features: Sales page, enable both the **Digital Sales Next Gen UI** feature and its child feature **Sales in the Redwood UX**

   > **Note:** It's very important to enable **both** Digital Sales and Sales in the Redwood UX.

   .

   Here's an example of the Edit Features: Sales page showing the Digital Sales Next Gen UI and Sales in the Redwood UX features enabled:

5. Click **Done**.

Configure Adaptive Search and Workspace

Oracle Adaptive Search and Workspace is required for Sales in the Redwood UX. The Setup Assistant enables the Adaptive Search configuration provided by Oracle for the objects that you selected when running the assistant. You can use the steps in this topic to change the objects that are enabled.

Enabling a business object:

- Builds a search index and makes the object available for Workspace.
- Enables navigation from business object icons to work areas that use Adaptive Search.
- Makes the object available for Global Search, REST web services, and Workspace infolets.

Select Which Business Objects Are Enabled for Adaptive Search

Here's how to change the business objects using Adaptive Search and Workspace:

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation functional area** > **Configure Adaptive Search task**.
2. In the Configure Adaptive Search page, click the **Setup** tab.

   > **Note:** If this is the first time Adaptive Search is being configured, then, with the Sales Foundation functional area selected, click **Actions** and then select **Change Feature Selection** from the list. In the Edit Features: Sales Foundation page, click **Enable for Configure Adaptive Search** and click **Done**.

3. In the Setup tab, **Quick** subtab, select the objects you want to enable or disable.
4. Click **Publish**.
5. Click the **Monitor** tab and then click the **Publish** subtab to monitor the process.

   After the process completes with a status of succeeded, the Workspace icon appears on the home page. If the process completes with errors, contact your help desk.

Other Things You Can Configure for Adaptive Search

Here are some additional configurations:

- **Configure the list of values** that use Adaptive Search, called Smart Pickers. See *Configure the Picker*.
- **Configure what shows up in list of prioritized recent items**, called My Lists or "smart lists". For example, you can specify how long to keep the items in smart lists if they aren't acted on and how often the lists are refreshed.

  See *Overview of My Lists* and *Change the Behavior of My Lists* for more information.

Related Topics

- Do I still need to run the Synchronize CRM Search Indexes process if I'm using Workspace?
- How can I enable the Mass Update feature in Workspace?
- How do I use the Search box and search operators to search for my records in Workspace?
- Can I rename my assigned saved searches in Workspace?
- Why can't I enable fields for the number of leads, opportunities, and activities for contacts in Adaptive Search?

Overview of My Lists

My Lists, also known as "smart lists", show users the records that are most relevant to them, based on their use and engagement with Sales. The lists help minimize navigation and searching.

My lists are enabled by default, although you can configure some aspects of them. See *Change the Behavior of My Lists* for details.

My Lists are included along with saved searches in Sales in the Redwood UX list pages and in the Sales Dashboard.

How the Lists Work

The lists are based on near real-time user context. They show the most relevant and contextual records data to users once every 10 minutes. They do this by using a predefined relevancy scoring mechanism.

The lists help reduce the navigating and clicking needed to do more searches. For example, the My List for Accounts includes accounts ranked by the number of times a salesperson has opened each account, its contacts, and its opportunities -- and how recently they opened these. So, if today, a salesperson opens or updates account information on Acme four times, but only opens Pinnacle once, then Acme appears higher on the list than Pinnacle.

Each list can display a maximum of 50 items. Items that haven't been touched for 30 days get automatically taken off the list.

Here are some factors that affect how relevancy scores influence the records that get displayed:

- Recency: The last time a user interacted with an object
- Frequency: How often a user interacts with an object
- Favorites: Records a user marked as a favorite
- Urgency: When an action is expected from a user, such as a task due tomorrow, an upcoming appointment, and so on
- Related objects: Relevancy scores are boosted for related account, opportunity, or lead objects associated with overdue tasks and appointments
- Event-based updates: Updates to win probability, status, and sales stage boost the relevancy score for opportunity records

The lists are created and maintained by these scheduled processes:

- The Generate Relevancy Feed process creates the lists. By default, this process runs every 3 hours.

  > **Note:** You can reduce the refresh rates of My Lists from once every 3 hours to near real-time (10 minutes refresh intervals) by setting the **Enable Near Real Time User Context Relevancy** profile option to Y.

- The Age User Context Relevancy process removes items from the list that haven't been touched by the user in the past 30 days. By default, this process runs once a day.

Supported Business Objects for Lists

Smart lists are derived from users' past and recent application touches and interactions with these business objects:

- Accounts
- Activities
- Contacts
- Leads
- Opportunities
- Partners
- Products and Product Groups

Change the Behavior of My Lists

My Lists are available automatically to salespeople as soon as they start working in the application. No setup is required. However, you can change My Lists behavior in a few ways:

- Change how long untouched items are kept in the list, from the default of 30 days.

- Change the refresh rate of My Lists from once every 3 hours to near real-time, 10-minute refresh intervals
- Change how often and when My Lists are refreshed, to improve the user experience.

Change How Long to Keep Untouched Records in the List

By default, items are kept 30 days after they're accessed last. For example, if your organization has long sales cycles, then you might want to keep items on the list for a little longer.

You can change the number of days untouched records are kept in the list by setting the profile option, Relevancy Aging Maximum Number of Days:

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation Functional area:** > **Manage Administrator Profile Values task**.
2. In the Manage Administrator Profile Values page, search by the profile option name **Relevancy Aging Maximum Number of Days** or code ZCA_UC_AGING_CYCLE.
3. Set the profile option value to the desired number of days.
4. Save your changes.

Change the Refresh Rates of My Lists

You can change the refresh rates of My Lists from once every 3 hours to near real-time, 10-minute refresh intervals, by setting the profile option, Enable Near Real Time User Context Relevancy:

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation Functional area:** > **Manage Administrator Profile Values task**.
2. In the Manage Administrator Profile Values page, search by the profile option name **Enable Near Real Time User Context Relevancy** or code ORA_ZCA_UC_ENABLE_NRT.
3. Change the profile option value from FALSE to Y to enable near real-time user contextual relevancy.
4. Save your changes.

Run the My List Processes with Different Frequencies and Schedules

You can change how often or when you run the two scheduled processes that generate the lists and remove untouched items from the lists:

- **Generate Relevancy Feed**

  Generates My Lists by analyzing all records that have been updated in the last 24 hours. By default, this process runs every three hours.
- **Age User Context Relevancy Feed**

  Removes from My Lists all items that haven't been accessed in the past 30 days (the number of days set in the profile option Relevancy Aging Maximum Number of Days). By default, this process runs once a day.

Enable Access Groups

You can use access groups to give sales resources more data permissions, beyond the access provided by the supplied data security policies.

Create an Access Group

After you've identified the group of users that need more access to object data, create an access group for those users. Here's how:

1. Sign in as user with the Sales Administrator role or as a setup user.

   > **Note:** The user must have the IT Security Manager job role or the Sales Administrator job role to create and manage access groups.

2. Go to the Access Groups page: Click **Navigator** > **Tools** > **Sales and Service Access Management**.

   Here's how the UI is mapped to the two roles mentioned here:
   - The Sales Administrator job role sees the Access Groups page in the Sales and Service Access Management work area.
   - The IT Security Manager job role sees the Sales and Service Access Management main page and uses the Configure Groups tab to display the Access Groups page.
3. Click **Create**.
4. In the Create Access Group page, enter the group name and make sure the **Active** checkbox is checked.
5. Save your new group.

Create Object Sharing Rules for the Group

Next, create the object sharing rules that grant access to object records.

1. In the Edit Access Group: Overview page click **Object Rules** > **Create Rule**.
2. In the Create Object Sharing Rule page, select the object you're creating the rule for from the **Object** drop-down list. For example, select **Opportunity**.
3. Enter a Name for your new rule, for example, `Opportunity_Open`.
4. In the **Access Level** field, select the type of object access you want to give group members.
5. Make sure that the **Active** check box for the rule is checked.
6. In the Conditions area, specify the rule conditions.

   For example, you might specify that group members have access to opportunity records that have a Status attribute equal to Open.
7. Select **Save and Publish** from the Actions menu to publish the rule so that it's available for assignment processing.
8. After the status indicator shows that the publish process has completed, save your work.
9. If this is the first custom rule you've created, you must also publish the new rule using the Object Sharing Rules page. To publish a rule for the first time, select the **Object Rules** tab, and then select **Publish Rules** from the Actions menu.

   For more rules that you create, this step isn't required. You only need to publish the rule once as described earlier in this procedure.
10. Now run the Perform Object Sharing Rule Assignment Processing scheduled process to ensure that the object sharing rules for each object are assigned properly.

Add Members to the Group

Finally, add resources to your new, custom access group. You can add users to the group by:

- Manually adding users in the UI
- Creating group membership rules to automatically add users

- Using Import Management

Here are the steps to create group membership rules to add users to your group.

1. In the Edit Access Group: Overview page, click the **Member Rules** tab.
2. Click **Create Rule**.
3. In the Create Group Membership Rule page, enter a **Name** for the rule, for example, enter **Sales_Support_Resources**.
4. Select the rule conditions. The conditions determine which resources are added or removed as members of the group.

   For example, you might specify that all resources that have an Organization attribute equal to Sales Support are added to the group.
5. Select **Save and Publish** from the Actions menu to publish the rule.
6. Save your work.
7. Now run the Run Access Group Membership Rules scheduled process to ensure that the access group membership rules are assigned and resources are added to the group.

   The Run Access Group Membership Rules scheduled process automatically runs every hour to update access groups with changes to the group membership. But, you can also run the process at any time from the Access Groups main page by selecting the **Update Groups and Members** option from the Actions menu.

   After the rules you created for your new access group are processed, all the users in the Sales Support organization have access to all open opportunities.

Edit Access Groups

After you create a custom access group, you can edit the group details. For example, you might want to add new object sharing rules or add or remove members.

Here's how to edit access groups:

1. Navigate to the Access Groups page in the Sales and Service Access Management work area.
2. Select the access group.

   Custom access groups show by default. But, to see system (predefined) access groups, select **System Groups - Role** from the **List** drop-down list.
3. What you can do depends on whether you're editing a custom or a system group.
   - System groups:

     You can review system group details, but you can't change any of the information or delete the group. System groups are predefined by Oracle and are automatically created and updated to reflect the job roles and user-job role assignments in your environment.
   - Custom groups:

     For custom groups, you can:

     - Change the group name or description.
     - Activate or inactivate a group: If you inactivate a group, group members lose any data access provided by the group.
     - Add group members by clicking **Add Members**.
     - Remove all group members who were added to the group manually by clicking **Remove Members**, or delete individual members from the group by clicking the **Remove** icon in the member row.

> **Note:** You can't remove members added through group membership rules.

- Delete the group by selecting **Delete Group** from the **Actions** menu.

4. Click the **Object Rules** subtab to view any predefined or custom object sharing rules defined for the group.

   You can make these changes for both system and custom access groups:

   - Enable or disable a predefined or custom rule for the access group by selecting or deselecting the **Enable** check box.
   - Remove a custom rule or a predefined rule you added to the access group. Click the rule and in the Edit Object Sharing Rule page, select **Delete** from the **Actions** menu.

     The rule is deleted for the group you're editing, but not for any other groups that the rule is associated with.
   - Add a preexisting rule to the access group. Click **Add Rule**, and then, in the search dialog box, search for and select the rule you want to add.
   - Create a new rule for the access group. Click **Create Rule**, and then define the new rule in the Create Object Sharing Rule page.
   - Change the access level provided by the rule for this group by selecting a new value from the rule's **Access Level** drop-down list.

   > **Note:** If you're editing a system access group, a **Lock** icon is displayed for any predefined rules that are associated with the group as part of the default security configuration. For these rules, you can't change the access level for the group and you can't remove the rule from the group. The only change you can make is to enable or disable the rule for the group.

5. Click the **Member Rules** subtab to view any group membership rules defined for the access group.

   > **Note:** You can't add members to system groups using group membership rules, so the Member Rules subtab isn't available for system groups.

   You can edit an existing rule from the Member Rules subtab by clicking the rule name link, or you can create a new rule by clicking **Create Rule**.

   If you select an existing rule to edit, the Access Group: Edit Group Membership Rule page appears, where you can edit or delete any of the rule details.
6. When you're finished editing the group details, click **Save and Close**.

   Changes you make to object sharing rules or group membership rules are processed when the Object Sharing Rule Assignment Process or the Access Group Membership Rules Process is next run.

Delete a Custom Access Group

You can delete a custom access group if you have the Delete Access Group privilege. Here's how to delete a custom access group:

> **CAUTION:** Once you delete a group and its members, you can't reactivate it. The users who were assigned to the group still exist, but they're no longer associated with the group, and group members lose any data access provided by the group.

1. Navigate to the Access Groups page in the Sales and Service Access Management work area.
2. Select the access group you want to delete from the groups listed.

On the Edit Access Group: Group_Name page, select **Delete Group** from the **Actions** menu.

3. In the confirmation dialog, click **Yes** to confirm your choice.
   The group is deleted and is no longer available on the Access Groups page.

Related Topics

- How do I create membership rules for custom access groups?
- How do I configure real-time and near real-time access for access group object records?
- Can I rename a custom role in an access group?

Enable the Activity Stream

Here's a summary of the set up steps to enable Activities for Sales in the Redwood UX.

Step and Description	Navigation
Step 1 You must create and activate an activities configuration for the Sales Lead object and the Opportunity object. You create an activities configuration by duplicating an existing one. Oracle provides a predefined configuration for each object. To use the predefined configuration, just copy it and activate it. To change what gets displayed in Activities for an object, you can edit your copy before activating it.	**Navigator** > **Configuration** > **Configure Activities Display**
Step 2 Run the **Publish Feed Elements** process to create the index required by Adaptive Search. Don't select the Production to Test Enabled checkbox. This checkbox is used for migrating indexes from production to test instances.	**Navigator** > **Tools** > **Scheduled Processes**
Step 3 Enable the natural English-language filtering of activities. Using this feature, a salesperson can enter "filter my tasks due tomorrow", to view all tasks due by the end of the next calendar day in their time zone where they're listed as a resource. Like all natural-language processing in Sales, this feature uses Oracle Digital Assistant (ODA) to process the text.	**Setup and Maintenance** > **Sales** > **Digital Assistant** > **Manage Digital Assistant**

Related Topics

- How do I set up activity notifications?
- How can I create approvals for activities such as appointments?
- How do I import activity contact data?
- Can I change the default activity notification email text?
- Are activity notes available in Oracle Sales in the Redwood User Experience?

4 Set Up Common Components

What are common components?

Common components are application components or functionality that all Oracle Fusion cloud application have in common. Tasks for common components include items like setting up back-end applications and structure, creating users, establishing the accounting calendar, importing geography data, and defining currencies.

For the back-end structures like your organization's General Ledger, Locations, and the like, follow the implementation guides for the relevant Oracle applications. You can find this product-area documentation on *Oracle Help Center*.

Where setups are unique to Oracle Sales, you'll find them in this guide in other *playbooks on Oracle Help Center*, or in the *Sales Questions and Answers* guide.

You might also need to consult developer guides, such as the security reference manuals, REST API guides, or Tables and Views guides. You can find these guides linked from the main *Oracle Sales Help Center* page.

You can also find guides detailing scheduled processes and analytics concepts and procedures on the main *Oracle Sales Help Center* page.

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

Users and Security

Overview of Users and Security

Access to Oracle cloud applications is secured using a role-based access control model (RBAC). In RBAC, users are assigned roles (often through automated provisioning), and roles are assigned access privileges to protected system resources.

In your initial implementation, you create a few types of users:

Types of Users You Get Started With

User Type	Typical Tasks	Typical Roles
Implementation users (also called setup users)	• Create more setup and other users • Give the initial user supplied by Oracle permissions to participate in setups • Monitor scheduled processes • Manage users, including granting more privileges to self and to others, and resetting passwords	• Application Implementation Consultant • IT Security Manager • Application Diagnostic Administrator • Employee

User Type	Typical Tasks	Typical Roles
Administrators	• Set profile options • Manage some scheduled processes • Modify lookup types and other UI artifacts	• Sales Administrator • CRM Application Administrator
Sales resources	Access transactional pages, such as leads, opportunities, accounts, activities, and so on	• Sales Representative • Sales Manager • Sales VP

See the Oracle Fusion Cloud Applications: Securing Applications guide for more information on user setups.

Create Implementation (Setup) Users

Providing users with the security permissions they need to complete the setup tasks in this guide is very simple if you used Setup Assistant for your initial setup. You just make a couple of entries and click Save. Provisioning rules provided by Oracle do the rest. To create more setup users, follow this procedure:

1. In Navigate to Setup and Maintenance and go to the Sales offering.
2. Go to **Functional Area: Users and Security Task: Manage Users**
3. On the Search Person page, click **Create**.
4. On the Create User page, in the Personal Details region, enter the user's name and a unique email address.
5. In the User Details region, enter a user name.

   If you leave the **User Name** field blank, the application automatically creates a user name for you. By default, the application uses the person's email as the user name, unless you change this default setting in the Security Console.
6. To automatically send an email notification to the user, select the **Send user name and password** option in User Notification Preferences. The email includes a link to create a password in the application.

   > **Note:** If this option isn't available, notifications might be disabled. Check the notification settings in the Security Console.

7. Select these values in the Employment Information region:

   User Values to Select in the Employment Information Region

Field	Value	Comments
Person Type	Employee	For setup only. The user doesn't have to be an employee.
Legal Employer	Your company name followed by the letters `LE`	The legal employer name is used for setup only, so doesn't have to correspond to any actual entity.
Business Unit	Your company name followed by the letters `LE BU`	The business unit name, like the legal employer name, is used for setup only.

8. In the Resource Information section, select **Sales Setup User** from the **Resource Role** list.
9. Click **Autoprovision Roles**.
   The **Role Requests** region displays these roles:
   - Application Diagnostics Administrator
   - Application Implementation Consultant
   - IT Security Manager
   - Employee
   - Sales Analyst
   - Sales Administrator

   The role request process might take a few minutes to complete, because it's set to run periodically. You can view the status of the request anytime you edit the user.
10. Click **Save and Close**.
    If you selected the **Send user name and password** option and notifications are enabled, the application sends the new account notification email. If you didn't select this option, then you must reset the password for the user using the procedure described in the *Reset Passwords* topic.
    After you create the user, you can no longer update the email address in this UI. You can instead update the email address on the Users tab in the Security Console.

Give Setup Users Permissions to See All Scheduled Processes

Setup users need to run and monitor several scheduled processes during implementation. By default, users can only see the scheduled processes that they themselves submit. However, if you create a custom role and assign your the setup users to it, you ensure that all of them can see which processes are running and their status, no matter who submitted them.

> **Note:** In Oracle applications, scheduled processes are commonly referred to as ESS jobs (Enterprise Scheduler Service jobs).

Here's how to add the custom role and assign users to it:

1. As a setup user, navigate to the **Security Console**.
2. Click the **Roles** tab.
3. On the Roles tab, click **Create Role**.
4. In the Create Role: Basic Information step, make the entries suggested in this table:

   Create Role: Basic Information Page Fields and Suggested Entries

Field	Suggested Entry
Role Name	Monitor ESS Processes
Role Code	MonitorESSProcesses
Role Category	Common - Abstract Roles

5. Click the **Role Hierarchy** step.
6. Click **Add Role**.
7. In the Add Role Membership window, search for **ESS Monitor Role** and click **Add Role Membership**.
8. Cancel out of the Add Role Membership window.
9. Click the **Users** step.
10. Click **Add User** and add all of the setup users by searching for each by name and clicking **Add User to Role**.
11. Click **Cancel** when you're done. The Users step should list all of the users you added.
12. Click **Next** to get to the **Summary and Impact Report** step.
13. Save your work.
    The users you added to the role can now monitor all of the scheduled processes in the Schedule Processes work area.

Concepts for Creating Sales Resources

Unlike setup users you created earlier, you must create sales users as resources who are part of the sales resource hierarchy. You can create sales users either in the Manage Users task UI or by resource import. You can't create resources in the Security Console.

Review these important concepts before you being to create sales resources:

- *How the Setup Assistant Gets You Ready to Create Sales Users*
- *Sales Resource Hierarchy*
- *Role-Provisioning Rules the Setup Assistant Creates Automatically*
- *Resource Roles That Provide Access to Sales in the Redwood UX*
- *When You Need More Resource Roles and Role-Provisioning Rules*

How the Setup Assistant Gets You Ready to Create Sales Users

Here's how the Setup Assistant helps you get ready to create sales users and the setups you might need to complete manually.

What Setup Assistant Does	What You Might Need to Do Manually
Creates more resource roles. All you do is enter their names.	After you run Setup Assistant, you can create more resource roles manually in Setup and Maintenance, using the Manage Resource Roles task. To get to this task, in the Sales offering's Users and Security functional area, find the Manage Resource Roles task.
Creates the role-provisioning rules for the standard resource roles provided by Oracle and for any other resource roles that you created in the Setup Assistant.	You can also create more provisioning rules for any resource roles you create outside the Setup Assistant in Setup and Maintenance, using the task Manage HCM Role Provisioning Rules. To get to this task, in the Sales offering's Users and Security functional area, find the Manage HCM Role Provisioning Rules task.
Sets the resource organization that you entered for the CEO as the top of the resource organization hierarchy. The Setup Assistant eliminates two manual steps: • Creating the resource organization	If you need to change the name of the resource organization after you run Setup Assistant, you can edit it in Setup and Maintenance, using the Manage Internal Resource Organizations task. To get to this task, in the Sales offering's Users and Security functional area, find the Manage Internal Resource Organizations task.

What Setup Assistant Does	What You Might Need to Do Manually
• Using the Manage Resource Organization Hierarchies task to specify that resource organization as the top of the Internal Resource Organization Hierarchy	
Prevents you from accidentally entering duplicate email addresses for users by setting the profile option, Enable Validation of User Work Email.	NA

Sales Resource Hierarchy

The sales resource hierarchy shows up as the org chart in the Resource Directory. It also:

- Controls which users can see what sales information.
- Forms the basis of your forecasting setup. For example, sales managers can view and forecast the opportunities of their subordinates, but not the opportunities managed by others.

> **Note:** The resource hierarchy you build doesn't have to match the formal reporting hierarchy in the Oracle HCM. The application builds the resource organization hierarchy using the management hierarchy that you specify when you create users. You must enter a manager for each user you create, except for the top of the resource hierarchy.

Role-Provisioning Rules the Setup Assistant Creates Automatically

The Setup Assistant automatically creates the role-provisioning rules for users with all the standard sales resource roles. The rules provision users with the job roles and abstract roles they need.

If you didn't use Setup Assistant, perhaps because you're implementing multiple services at the same time, then you must create all of the role-provisioning rules manually. You create the rules using the Manage HCM Role Provisioning Rules task.

Here's a list of the role-provisioning rules that the Setup Assistant creates, the condition that triggers the provisioning, and the job and abstract roles each rule provisions. You can get a description of each job and abstract role from the Security Reference for CX Sales and Fusion Service guide.

Role-Provisioning Rules Setup Assistant Creates

Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned	UI Access Provided
Sales Administrator	• HR assignment status: active • Resource role: Sales Administrator	• Sales Administrator • Resource	• Sales in the Redwood UX • Classic Sales
Sales Manager	• HR assignment status: active • Resource role: Sales Manager	• Sales Manager • Resource	• Sales in the Redwood UX • Classic Sales
Sales Representative	• HR assignment status: active	• Sales Representative	• Sales in the Redwood UX

Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned	UI Access Provided
	• Resource role: Salesperson	• Resource	• Classic Sales
Sales Vice President	HR Assignment Status is Active Resource Role is Sales Vice President	Sales VP Resource	Both CX Sales and Sales in the Redwood UX UIs
Sales Setup User	HR Assignment Status is Active Resource Role is Sales Setup User	Application Implementation Consultant IT Security Manager Application Diagnostics Administrator Sales Administrator Sales Analyst	Both CX Sales and Sales in the Redwood UX UIs
Employee	HR Assignment Status is Active System Person Type is Employee	Employee	Not applicable.
Channel Account Manager	HR Assignment Status is Active Resource Role is Channel Account Manager	Channel Account Manager Resource	Classic Sales
Channel Sales Manager	HR Assignment Status is Active Resource Role is Channel Sales Manager	Channel Sales Manager Resource	Classic Sales
Channel Operations Manager	HR Assignment Status is Active Resource Role is Channel Operations Manager	Channel Operations Manager Resource	Classic Sales
Chief Executive Officer	HR Assignment Status is Active Resource Role is Chief Executive Officer	Sales VP Resource	Classic Sales
Contract Administrator	HR Assignment Status is Active Resource Role is Contract Administrator	Contract Administrator Resource	Classic Sales
Contract Manager	HR Assignment Status is Active Resource Role is Contract Manager	Contract Manager Resource	Classic Sales
Customer Data Steward	HR Assignment Status is Active	Customer Data Steward	Classic Sales

Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned	UI Access Provided
	Resource Role is Customer Data Steward	Resource	
Data Steward Manager	HR Assignment Status is Active Resource Role is Data Steward Manager	Data Steward Manager Resource	Classic Sales
Partner Administrator	Resource Role is Partner Administrator	Partner Administrator	Classic Sales
Partner Sales Manager	Resource Role is Partner Sales Manager	Partner Sales Manager	Classic Sales
Partner Sales Representative	Resource Role is Partner Salesperson	Partner Sales Representative	Classic Sales
Sales Lead Qualifier	HR Assignment Status is Active Resource Role is Sales Lead Qualifier	Sales Lead Qualifier Resource	Classic Sales
Sales Restricted User	HR Assignment Status is Active Resource Role is Sales Restricted User	Sales Restricted User Resource	Classic Sales
Contingent Worker	HR Assignment Status is Active System Person Type is Contingent Worker	Contingent Worker	Classic Sales

You create sales users as employees. So, two role-provisioning rules come into play:

- The rule triggered by the users' resource roles
- The rule triggered by the fact that they're employees

For example, when you create a user with the Sales Manager resource role provided by Oracle, the application automatically provisions the Sales Manager job role and the Resource abstract role. Because you're creating the user as an employee, the application also provisions the Employee abstract role.

Resource Roles That Provide Access to Sales in the Redwood UX

When you assign these four resource roles to resources, the role provisioning-rules created automatically by the Setup Assistant provide access to Sales in the Redwood UX. They also provide users access to the classic Sales UIs.

- Sales Representative
- Sales Manager

- Sales VP
- Sales Administrator

When You Need More Resource Roles and Role-Provisioning Rules

You might need to create more resource roles, either by entering them in the Setup Assistant or by using the Manage Resource Roles task. Here are some reasons you might need more resource roles and role-provisioning rules:

- You want other job titles to display for your users.

  For example, if you want a user to display the Sales Evangelist title in the organization chart, you must create the Sales Evangelist resource role and a provisioning rule for it.
- You want to provision some users with special privileges.

  For example, if one of the sales managers in your organization also acts as a sales administrator, you provision them with both job roles. To do this, you must create a new resource role and a provisioning rule to go along with it.
- You want to create a sales administrator who's a manager.

  The Sales Administrator resource role provided by Oracle is intended for an individual contributor (member). If your sales administrator manages others, then you must create a separate manager resource role and a provisioning rule to go with it.

Whenever you create a resource role, you must also create a corresponding role-provisioning rule. For example, if you created the Sales Support resource role, then you must create a role-provisioning rule to provision one or more of the available job roles and the Resource abstract role. If you created the resource roles in Setup Assistant, then the rules are created for you automatically. If you create the resource role using the Manage Resource Roles task, then you must create the role-provisioning rules manually.

Related Topics

- Create a Resource Organization
- Create Role-Provisioning Rules for the Additional Resource Roles
- Designate an Organization as the Top of the Sales Hierarchy
- How can I change the name of the top resource organization and other resource organizations?
- Create Additional Resource Roles

Security Configuration Work Areas

Use the security configuration work areas to review information about the access provided by sales job roles and to change the default settings if necessary. For example, you can create custom versions of the roles and add or remove the privileges they provide.

The following sections describe each of the security configuration work areas and the types of configurations you can make using each one. See the Securing Sales and Fusion Service guide for further information about using each work area.

Security Console

You can make custom copies of the sales job roles and can edit the custom roles from the Roles tab of the Security Console. You can add or remove function security policies from a custom role, add additional roles to the custom role hierarchy, and assign the custom role to users. You can also add custom data security policies to either the predefined or custom sales job roles.

> **Note:** It's recommended that you use access groups and object sharing rules rather than data security policies to configure data security. For additional information, see the Access Groups chapter in the Securing Sales and Fusion Service guide.

You can access the Security Console by clicking the **Security Console** link under the **Tools** heading in the Navigator.

> **Tip:** The Data Security Policies train stop on the Roles tab of the Security Console lists only the data security policies that are assigned directly to a Digital Sales role. Policies that the role inherits from subordinate roles aren't displayed. To review all the data access policies a Digital Sales role provides, use the Sales and Service Access Management work area as described in the next section.

Sales and Service Access Management UI

Review a user's access to object data using the Sales and Service Access Management UIs. You can access the Sales and Service Access Management work area by clicking the **Sales and Service Access Management** link under the **Tools** heading in the Navigator.

The Sales and Service Access Management UI displays all the data security policies provided by a predefined or custom job role for a selected object. You can update policies for a custom job role and object on this UI, or extend the custom role's access to other object data. You can also use the access explorer functionality in the work area to view all the access an individual user has to object data, including access provided by data security policies and access group membership.

Access Groups UI

You can create and manage access groups and object sharing rules using the Access Groups UI in the Sales and Service Access Management work area.

You can access the Access Groups UI by clicking the **Sales and Service Access Management** link under the **Tools** heading in the Navigator, then clicking **Configure Groups**.

Access groups provide a way of providing access to object data based on conditions you define in object sharing rules. Use access groups to either supplement the data access users receive through their job roles and other security mechanisms, or to refine the access that's provided by the predefined conditions to sales object data.

There are two types of access groups:

- Custom access groups you create.

  You can add members to these groups, define rules to specify the access group members should have to object data, and edit or delete the groups as required.
- System access groups created for you by Oracle.

  System groups provide an alternative way of managing a user's access to data. A system group is created for each of the predefined job roles in your environment. Predefined object sharing rules associated with each group provide the same access to data as is provided by the predefined job roles and associated data security policies.

Create Sales Users

Setup Assistant creates the CEO at the top of the resource hierarchy for you. You have the option of importing the rest of the sales users in the hierarchy. However, you might want to create some users manually in the UI for testing. Because you must specify the manager for each user you create, start creating users from the top of the corporate hierarchy and work your way down.

Creating sales users creates rudimentary Human Resources records, even if you aren't implementing Oracle HCM. Before you create sales users, you must create the elements of the resource hierarchy they're a part of. And you must create the provisioning rules that automatically provide the sales users you create with the security permissions they need to do their jobs.

Create Sales Users in the UI

Here's how to create sales users in the UI. The procedure is slightly different for managers and individual contributors:

- You must assign each manager their own resource organization. You can create the resource organization while creating the manager.
- Each individual contributor automatically inherits the manager's resource organization.

The application determines who's a manager from the resource role you assign to the user.

There are two ways to get to the UI where you create users:

- In Setup and Maintenance, go to: **Offering: Sales Functional Area: Users and Security Task: Manage Users**
- In the Navigator, click **Users and Roles** under the **My Team** heading.

1. Once you're in the Manage Users area, on the Search Person page, click **Create**. The application prepopulates today's date in the **Hire Date** field and uses that date as the start date for the resource.

   If you're planning to use quotas, then you must make sure that the hire date is a date before the start of the first quota period. For example, if you're allocating monthly quotas for fiscal year July 01, 2019 to June 30, 2020, then you must enter a hire date of `7-1-2019` or earlier. You can't change the hire date after you create the user.
2. In the User Details region, enter the user name.

   If you leave the **User Name** field blank, then the application automatically creates a user name for you. By default, the application uses the email as the user name. You can select other default user name formats, such as first name initial and last name, in the Security Console work area.
3. If you didn't disable notifications in the Security Console, you can select the **Send user name and password** option. Selecting the option sends users a URL they can use to reset their password and sign in. The application sends the email notification immediately after you save the user record for the first time. This option is available only before you save. After you save the record, you must instead use the Security Console to reset the password and send the notification.
4. Make these selections in the **Employment Information** region:
   - **Person Type:** Employee
   - **Legal Employer:** Your company name followed by the suffix LE

- **Business Unit:** Your company name followed by the suffix LE BU

The legal employer and the business unit names aren't visible in the sales application, so the names don't have to correspond to actual entities in your company.

> **Note:** The sales application doesn't use the remaining fields in the Employment Information region: Job, Grade, Department, Location, Mail Stop, and Manager.

5. Make these entries in the Resource Information region:
   a. From the **Resource Role** list, select the role the user plays in the resource organization. For example, select either the **Sales Representative** or the **Sales Manager** resource role.
   b. From the **Reporting Manager** list, select the user's manager.
   c. If the user you're creating is a manager, then you must enter a resource organization for the user in the **Organization** field.

      Here's how you create the resource organization from this step:

      i. Click **Create** link at the end of the **Organization** list.
      ii. Make these entries in the Create Organization window: Enter the organization name. Make sure the **Sales** option is selected and click **OK**.

      If the user you're creating isn't a manager, then the resource organization is automatically copied from the manager.
6. Click **Autoprovision Roles**. The application provisions the job and abstract roles according to the role provisioning rules.
7. Save your work. The application creates the user. If you selected the **Send User Name and Password** option, then the application also sends the email with the URL the user can use to sign in to the application for the first time.

Change an Employee into a Sales Resource

If you're implementing sales on after you've implemented Oracle HCM, then salespeople have already been created as employees and users. In this case, you must manually convert the employee into a resource and provision them with the job roles they need.

Here's how:

1. Navigate to the **Resource Directory**.
2. Click **Identify Resources** in the **Tasks** region.
3. On the Identify Resources page, fill in the Person Name or Registry ID. You don't need to enter the complete name. The application automatically searches for any characters entered, even if it's only a single character.
4. Select `Employee` as the Usage and click **Search**.
5. Select the employee and click **Add as Resource**.
6. Click **OK** on the confirmation message. The employee is now also a sales resource.
7. On the Add Resource Information page, in the **Resource Details** section, specify dates for the resource.
8. Select the **Organization** and the **Role** that you want to assign to the resource.
9. Optionally, in the Sales Person Information section, specify more information about the resource.
10. Save your work.

Import Users

Overview of Sales User Import

After you create a couple of sales users in the UI to test your setup, you're ready to import the rest using the resource import Excel macro provided by Oracle.

The import:

- Creates resource organizations for each manager
- Creates the sales resource organization hierarchy
- Provisions the users with the job roles and abstract roles they need

Note:

- Use the import macro only for sales users. You can't use it to import service users or contracts users, for example.
- You can import up to 5,000 users at a time using the macro. If you import multiple batches of users, you must ensure that each import completes before starting another.
- You can import additional attributes by appending columns to the import macro, but you can't make any other changes. You can't edit the Visual Basic for Applications (VBA) code or other functions.

Here's an overview of the setup steps for importing users using the import macro.

Step and Description	Navigation	Where to Find More Information
Step 1 Sync sales security information with the LDAP directory before you import sales users for the first time and also after creating any of your own job roles. To retrieve the latest security information, you run the Retrieve Latest LDAP Changes process using the Run User and Roles Synchronization Process task.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Run User and Roles Synchronization Process**	See the topic: *Synchronize Your Sales Application with the LDAP Directory*
Step 2 From article Oracle CX Sales: Getting Started with Your Sales Implementation: Import Macros (Doc ID 2229503.1) on support.oracle.com, download the Resource Import Macro and the `.jar` file into the same desktop folder.	None.	See the topic: *Download the Macro for Importing Sales Users*
Step 3 Here's what to enter in the macro:	None.	See the topic: *Enter Sales User Data into the Resource Import Macro and Import*

Step and Description	Navigation	Where to Find More Information
1. Enter the business unit and the legal entity. You can obtain these from the Review Company Information task you completed earlier. 2. Download any additional resource roles you created by clicking a button on the Role Details worksheet. 3. Enter the user information in the Resource worksheet, starting from the top of the user hierarchy. 4. Click **Create Import Activity** to import.		
Step 4 After each import and whenever you update the resource hierarchy, you must run 4 processes to complete resource and resource hierarchy creation: • Send Pending LDAP Requests • Update Person Search Keywords • Reporting Hierarchy Generation This process requires you to select parameters when you run it. For the others, you just submit. • Synchronize User GUID	**Navigator** > **Tools** > **Scheduled Processes**	See the topic: *Run Processes to Complete Resource and Resource Hierarchy Creation*
Step 5 In the Security Console work area reset the password for a sales user you want to use for testing.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Applications Security Preferences**	See the topic: *Reset Passwords for Others*
Step 6 Sign in as the test user and review the resource hierarchy you created by navigating to the Resource Directory and displaying a graphical representation of the hierarchy. You can upload user images in the Resource page in the Resource Directory. You can't import them. Use the Manage Users task to correct any minor errors. Alternatively, you can make corrections in the macro and import again.	**Navigator** > **Resource Directory**	See the topic: *Review the Resource Hierarchy You Created and Upload User Images*.
Step 7 If you enabled forecasting by opportunity owner in Setup Assistant, then you must run the Refresh Territories from Resources process to build the territories for the resources you just imported.	**Navigator** > **Tools** > **Scheduled Processes**	See the topic: *Run the Refresh Territories from Resources Process*

Step and Description	Navigation	Where to Find More Information
You must run this process every time the resource hierarchy changes, so you should run it on a daily or weekly basis. If you're using sales territories to assign opportunities by address, product or other dimensions, then you can skip this step.		

For information on how to manage sales users after you create them initially, see the topic *How do I change user resource roles when job assignments change?* and the rest of the User Management chapter in the Securing Sales and Fusion Service guide.

Sync Sales with the LDAP Directory

You must run the Retrieve Latest LDAP Changes process before you import sales users for the first time and after creating any of your own job roles. The process retrieves the latest security information from the LDAP directory.

1. In Setup and Maintenance, from the Sales offering's Users and Security functional area, open the task Run User and Role Synchronization Process.
2. On the Retrieve Latest LDAP Changes page, click **Submit**.

Enter Data into the Resource Import Macro and Import

Here's how to enter data into the Resource Import Macro and import. You can import up to 5,000 users at a time. If you import multiple batches of users, you must ensure that each import completes before starting another.

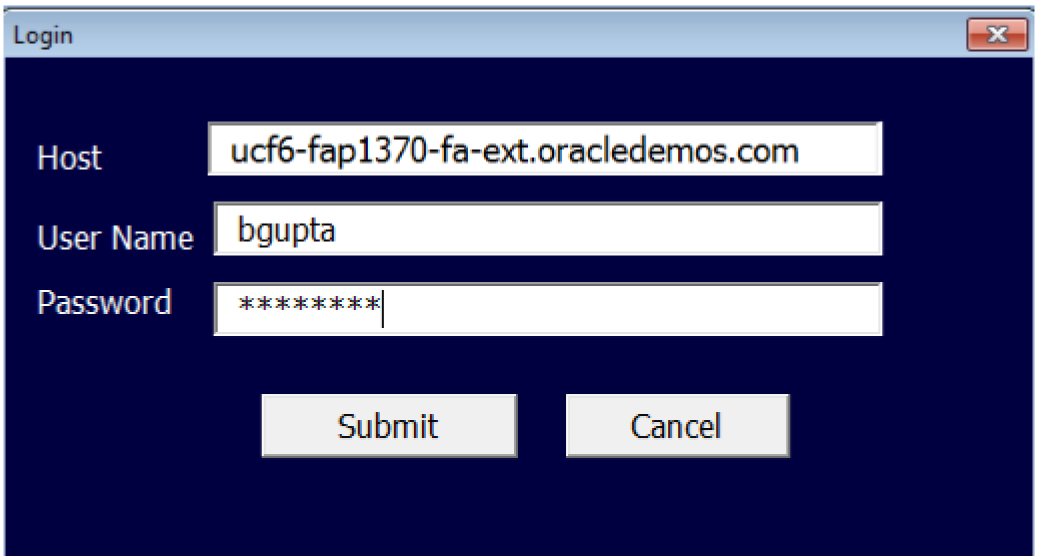
1. Confirm that you have the following information:
    - Legal entity name (usually your company name followed by **LE**)
    - Business unit name (usually your company name followed by **BU**)
    - The name of the resource organization that belongs to the resource who manages the first user or users you're importing.

      The resource organization name forms the link between the resources you created and those you're about to import. If you're importing users who report to the CEO you created in the Setup Assistant, for example, then you must enter the resource organization name you entered in Setup Assistant for that CEO. Remember that, because the resource hierarchy is different from the human resources hierarchy, the manager in the resource hierarchy isn't necessarily the same person as the actual manager in the HR organization.
2. Open the Resource Import Macro file you downloaded earlier.
3. Enable macros in Microsoft Excel, if required.
4. Click the **Role Details** worksheet. The standard sales roles are listed:
    - Chief Executive Officer
    - Sales Administrator
    - Sales Manager
    - Sales Vice President
    - Salesperson

5. If you created additional resource roles in Setup Assistant or manually, click **Populate Roles from Server** and enter the following details in the Login window:
    - Host information for your environment.

      The host name is the portion of the URL of your environment between `https://` and the next forward slash, `/`. You can get the correct host name from the URL by signing in to your application. Don't copy the host name from your application sign-in page because the URL is different.
    - Your user name
    - Your password

   Here's a screenshot of the Login window with sample host information for a test environment.



6. Click **Submit**.

   The macro retrieves any additional resource roles. All the roles are available for selection from the list of values in the **Resource Role** column in the **Resource** worksheet.
7. To import resource attributes not available on the Resource worksheet:
    a. Click the **Attributes Mapping** worksheet.
    b. Click **Fetch Attributes from Server** and sign in.
    c. Use the list of values to add any additional attributes to the **Attribute Name** column.
    d. You can use the **Column Header** to specify a different name for the attribute to appear as the column header in the Resource worksheet.
    e. Click **Update Headers**.

       The new attributes are appended to the last column on the **Resource** worksheet.
8. Click the **Resource** worksheet.
9. In the fields at the top of the sheet, enter your legal entity and business unit.

10. Enter the sales users that you want to import, working your way down the sales hierarchy. You must start at the top because you must enter the manager organization name for each user you import.

    The macro uses the resource organization names to build the resource organization hierarchy. Here's an overview of what to enter in the macro columns:

Column	What to Enter
First Name	Enter the first name as you want it to appear in the sales application.
Last Name	Enter the last name as you want it to appear in the sales application.
Email	You must enter a unique email address.
Resource Role	From the list, select the name of the resource role that you're assigning to the user. If you paste your data into the worksheet, it gets verified when you import.
Organization Name	For each manager, enter the name of his or her resource organization. Entry is disabled for individual contributors because they inherit the organizations of their managers. The organization names you enter here appear in the Resource Directory and elsewhere in the UI.
Manager Organization Name	Enter the organization name of the user's manager. You must enter the exact name you entered for the manager. Even an extra period or change in capitalization can throw the import off.

11. When you're done with your entries, click **Create Import Activity**.
12. If you're asked to correct errors in your entries, do the following:
    a. Click **OK**

       The Error worksheet displays your errors.
    b. Click each error link in column D and make the correction on the Resource worksheet.

       Note: After you correct an error, you must click outside the field for the correction to be recognized.
    c. Click **Create Import Activity** again.
13. On the Login page, enter the host, user name, and password if required.

    If you previously entered these details on the Role Details worksheet when retrieving roles from the server, then the same values appear here.
14. Click **Submit**.

    The application displays one of the messages listed in the following table.

Message	Meaning
`The file import activity was submitted successfully.`	Your import has started. If the file import activity is submitted successfully, then the confirmation message displays the job ID.
`Unable to connect to the server at this time.`	You may have entered an incorrect host.

Message	Meaning
`Unable to submit the file import activity. Check log for details.`	Open the Errors work sheet to view the error details.

15. If your import activity was submitted successfully, then click **Activity Details** to monitor its progress.

    The Activity Details window lists the import activity name, its ID, and its status.

    The import may take a few minutes to complete.

    - You can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is `Completed`.
16. If the import activity completes with errors, here's how to correct them:
    a. Click **Generate Log** to display any error messages.
    b. On the Errors worksheet, click the value in the Location column (D) to navigate to the record, correct the issue, and click **Submit** again to create a new import activity.
17. After the import completes with the status of Completed, you can click **Generate Log** to save a file that lists the imported sales users.

    The file is saved to the destination folder where you saved the macro.
18. Save the macro file with your data for updates at a later time. You can use the macro to make both minor updates such as misspelling of names. With a bit of extra work, you can even use the macro to change the sales hierarchy.
19. Now that you've completed creating users, verify the import from the Manage Users page or from the Resource Directory.

Finish Resource and Resource Hierarchy Creation

After you import sales users, you must run four scheduled processes to complete the resource and resource hierarchy creation:

- Send Pending LDAP Requests
- Update Person Search Keywords
- Reporting Hierarchy Generation
- Synchronize User GUID

Here's how to run the processes:

1. Navigate to **Navigator** > **Tools** > **Scheduled Processes**.
2. Click **Schedule New Process**.
3. In the Schedule New Process window, **Name** field, click **Search: Name**, the down arrow.
4. Click **Search**.
5. In the Search and Select: Name window, enter the name of the process and click **Search**.
6. Select the process name in the search results and click **OK**. The Schedule New Process window now displays the name of your process.
7. In the Schedule New Process window, click **OK**.
8. In the Process Details window, you must enter parameters only for the Reporting Hierarchy Generation process. The other processes don't require parameters. Here's what to enter for Reporting Hierarchy Generation:
    a. In **Tree Structure Code**, select **RESOURCE_ORG_TREE_STRUCTURE**.
    b. In **Tree Code**, select **GLOBAL_SALES_MARKETING**.

   c. In **Tree Version ID**, select the ACTIVE version (the only one displayed).
9. Click **Submit**.

Review the Resource Hierarchy and Add User Images

Now that you have created users, you can verify the resource hierarchy in the Resource Directory and upload user images. The Resource Directory displays a visual representation of the hierarchy and lets you view and edit details for each resource.

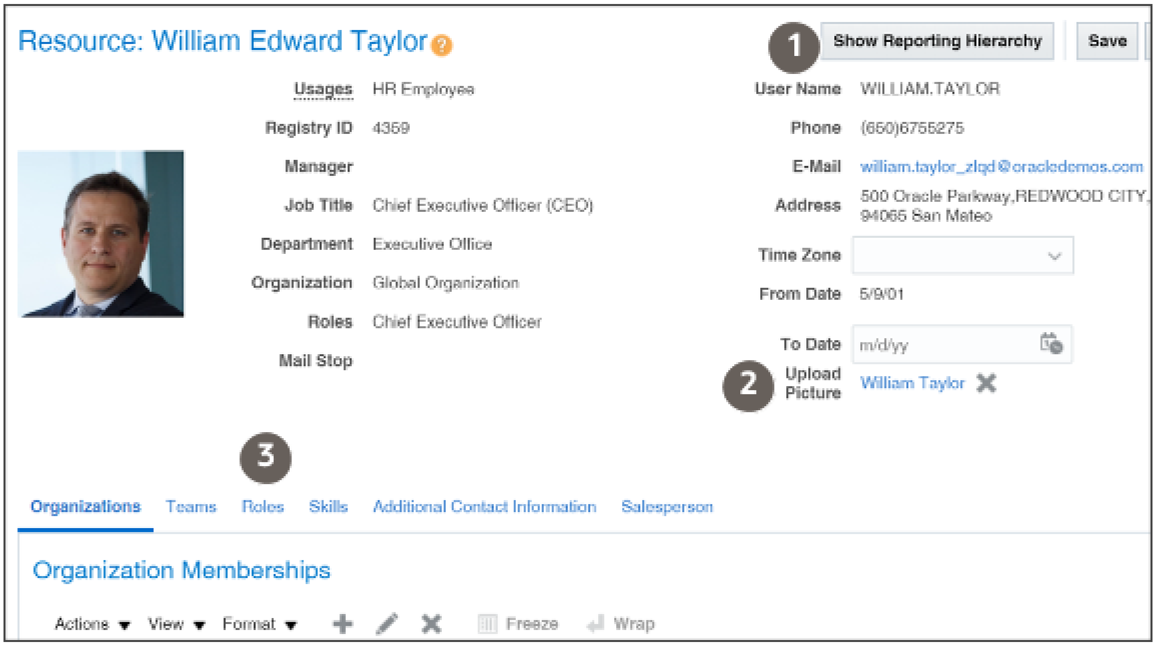
The Resource Directory is part of the HCM application, so much of the detailed information you see is only used if you implement sales together with HCM. For example, your sales application doesn't track or use resource skills and doesn't use resource teams, so you can ignore these.

Verify the Resource Hierarchy

1. Click **Resource Directory** in the Navigator.
2. In the Resource Directory page, search for the top user (the CEO) by first name using the Search: Resources panel on the left of the page.
3. Click the user name link in the Search Results.
4. Here's what you can do on the Resource page:

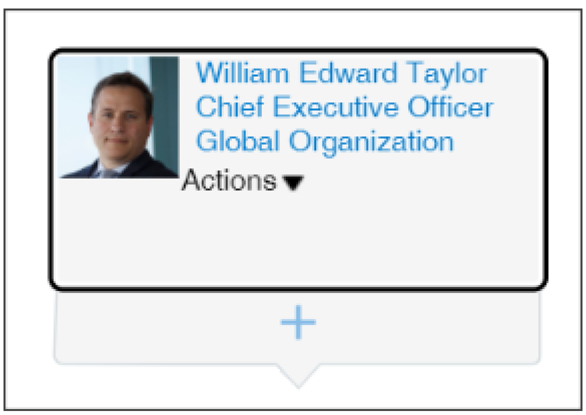
   - View the visual representation of the resource hierarchy by clicking **Show Reporting Hierarchy** (callout 1 in the screenshot).
   - Upload a picture of the user by clicking **Upload Picture** (callout 2).
   - Review the job and abstract roles provisioned to the user on the **Roles** tab.

   Here's a screenshot of the Resource page showing details for the CEO. Because this screenshot was taken in an environment with both sales and human resources implemented, the page includes detail you don't see in a sales-only implementation. The Job Title, Department, and Manager fields are more important for HCM, so is the information on all of the tabs except Roles. Remember that the resource hierarchy in sales is different from the HCM hierarchy. The resource hierarchy displays the resource role that's in the Role field and the resource organization shown in the Organization field, not the job title and department. In this UI, you can maintain information about team membership, skills, and so on, but this information isn't used elsewhere in the sales application.

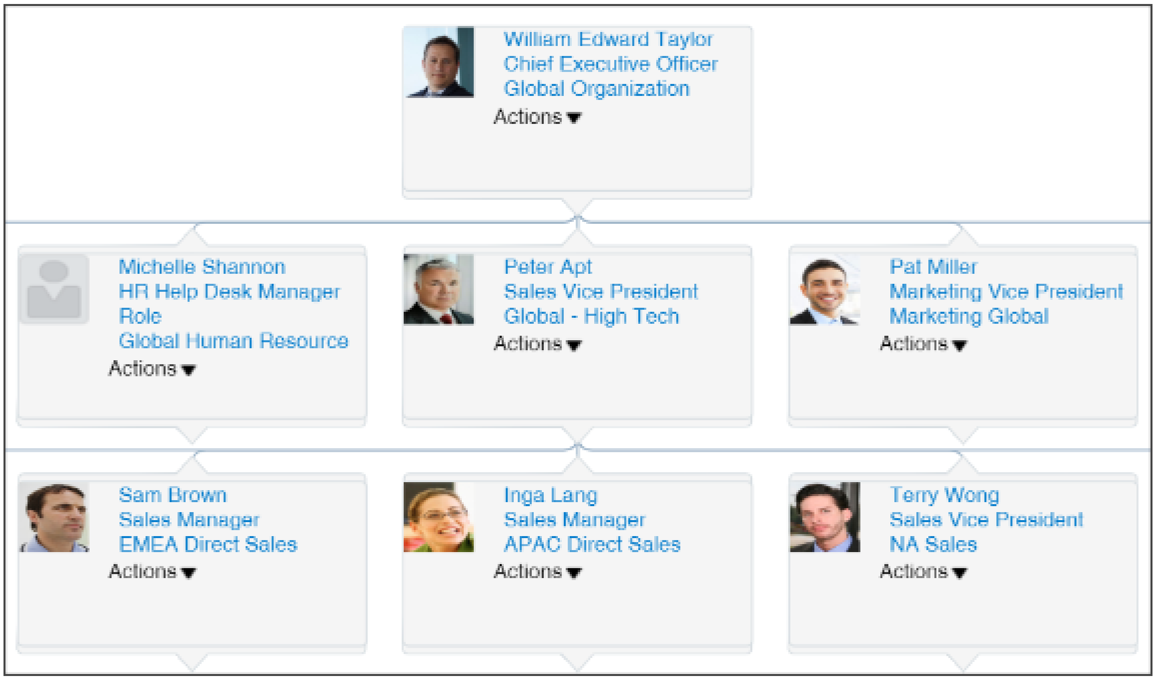


5. Click **Show Reporting Hierarchy**.

   The application displays a box for the resource.



6. Double-click the **Show** icon (the plus sign) to display the whole hierarchy. Navigation tools on the top left of the page make it possible to zoom in and out.



Edit User Records

Here's how you can change the user name, fix spelling errors, and make other edits in a single record. Alternatively, you can perform these same edits in the Excel macro and import again.

1. Open the task **Manage Users** from the Setup and Maintenance work area:
   - Offering: Sales
   - Functional Area: Users and Security
   - Task: Manage Users
2. In the **Keywords** search field, enter the first name of the user.
3. Click **Search** (the right arrow icon).
4. Click the name link in Search Results.

   The application displays the user record in the Edit User page.
5. In the Edit User page, you can edit the information about each user. For example, you can:
   - Fix spelling errors
   - Change the resource roles and provisioning of job roles
   - Change the user name

     Changing the user name requires extra setup for Oracle BI Answers. Oracle BI Answers, the embedded reporting tool for building and modifying reports, creates a separate GUID from the user name when you create a user. If you change the user name, then you must update the BI Answers GUID by running the Rename Accounts Self-Service utility. You can download the utility from My Oracle Support article Oracle Fusion BI: Self-Service Forget Accounts and Rename Accounts Tools (Doc ID 2635720.1)
6. Click **Save and Close** when you are done.

Refresh Territories if Using Forecasting

If you enabled forecasting by territory owner in Setup Assistant, this topic is for you. Whenever you import sales users (resources), you must refresh territories by running the Refresh Territories from Resources process. If you're using address, product, or another sales territory dimension to assign opportunities, then you can skip this setup entirely.

The Refresh Territories from Resources process runs automatically before each forecasting window. If you run the process immediately after importing sales users, you assure that users get to see forecasts immediately rather than having to wait for the next forecasting period. The process updates the territory hierarchy to match your resource hierarchy, with the resources as territory owners.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. On the Overview page, click **Schedule New Process**.
3. In the Schedule New Process window, enter `Refresh Territories from Resources` in the **Name** field and press **Return**.
4. Select the process and click **OK**.

Accounting Calendar

Overview of the Accounting Calendar in Sales

The accounting calendar defines the start and end of your fiscal year and the time periods in that calendar, including the exact dates for each time period. Oracle Sales uses these defined periods, often called enterprise periods, for multiple purposes. Based on your entries in the Setup Assistant creates the periods for your sales forecasts, quotas, and reports.

Here are some examples:

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

The Setup Assistant creates the default accounting calendar for 5 years, starting on the first day of the month and the year you enter. You should start the calendar at least 2 years in the past, to allow for historical data you might import.

The period frequency set in your fiscal calendar is the shortest period you can use. Most sales organizations select monthly (the default setting in Setup Assistant). A monthly period frequency enables you to generate monthly forecasting windows that let your organization to update quarterly forecasts. And you can break down activities and reports by month and summarize by quarter and year. If you set the period frequency to yearly, then you can create reports and activities for the year, but can't break them down by month. If you set the period frequency to weekly, then you can perform activities and generate reports by week, quarter, and year, but not by month because the number of weeks varies by month.

Create and Review the Accounting Calendar

The Setup Assistant completes all of the tasks that you need to create the accounting calendar; it also enables the calendar in Oracle Sales. You can review the accounting calendar the Setup Assistant created for you. Optionally, you can generate forecasting periods for additional years in the future in your review.

What Setup Assistant Completes for the Accounting Calendar

Here's what the Setup Assistant completes for the accounting calendar:

- Creates the accounting calendar itself.
- Creates the forecasting periods for five years from the year you entered.
- Enables the calendar for use by setting the profile option, Accounting Calendar Default.
- Enables the calendar to be used in analytics and reports by running the Refresh Denormalized Time Dimension Table for BI scheduled process.

CAUTION: You can't make changes after you submit calendar data on the first run.

Review the Accounting Calendar

If you need to make other changes to the accounting calendar, then you must create a new accounting calendar. For example, you might need to start the calendar in an earlier year.

CAUTION: You can't create a different accounting calendar after you start using your calendar for forecasting and reporting.

See *Create the Accounting Calendar* for more information.

Here's how to make changes before you start using the calendar in forecasting and reporting:

1. In Setup and Maintenance, go to: **Sales offering** > **Company Profile functional area** > **Manage Accounting Calendars task**.
2. On the Manage Accounting Calendars page, click the name of the calendar created for you by the Setup Assistant.
3. The Edit Accounting Calendar page displays the periods created for you. These periods display by year, beginning with the start date you entered in the Setup Assistant. You can change the year format and generate periods for additional years.
4. To generate periods for additional years, on the Edit Accounting Calendar page, click **Add Year** and save. Do this for each year you want to generate periods for.
5. Save your changes.

Related Topics

- Create the Accounting Calendar

Geography Data

Overview of Geographies

Geographies make it possible for you to set up validation for address elements such as states and cities to prevent address data entry errors. You should set up geographies data for the countries where you do business.

For example, if you're setting up sales territories by states in the US, it's a good idea to have salespeople select the states from a list rather than entering them manually. Preventing address entry errors ensures that the accounts are assigned to the correct territory and that opportunities are included in forecasts.

If you subscribe to the Oracle Address, Email, and Phone Verification service, you don't really need the validation. Using the service, salespeople can look up and enter valid addresses for most countries. See the *Using Oracle Address, Email, and Phone Verification* guide for more information.

Oracle licenses geography data from Loqate that you can import, at no additional cost. Or, you can license geography data from another supplier and import it from a file. For more information about importing third-party geography data, see the guide Understanding Import and Export Management for CX Sales and Fusion Service.

For more information on geographies and Loquate, see *Overview of Geographies, Geographic Entities, and Locations*

What the Setup Assistant Completes for Geographies

Using the Setup Assistant, you can import the geography data for up to three countries at a time. The assistant:

- Imports the geography data for up to three countries each time you run it.
- Enables the mapping of addresses for a specific country when you select the Geocoding option for that country.
- If you selected the Geocoding option for any country, the application schedules the Populate Location Latitude and Longitude Information process to automatically generate geographic coordinates from addresses. Oracle CX Sales Mobile and other applications use this to put addresses on a map.

What You Might Need to Do Manually

These are the items that you must complete manually to use them:

- Set up validation for address elements that you're using for sales territory assignment.

  If you're assigning accounts to salespeople by state, for example, having a list of values for States ensures that salespeople don't make mistakes during manual address entry.
- Import geographies for additional countries.
- Enable geocoding for additional countries.
- If you didn't enable geocoding in the Setup Assistant, you must run the Populate Location Latitude and Longitude Process on a regular schedule.

Import Geography Reference Data

Here's how to import geography reference data licensed by Oracle.

1. In Setup and Maintenance, go to: **Sales offering** > **Sales Foundation functional area** > **Manage Geographies task**.
2. In the Manage Geographies page, enter either the country name in the **Country Name** field or the two-letter ISO code of the country in the **Country Code** field.

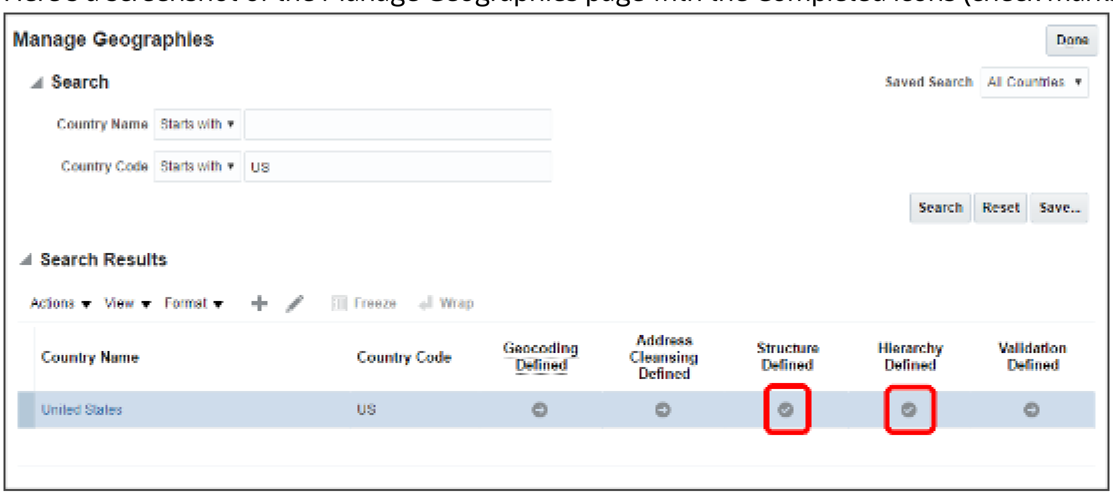
   Examples of ISO country codes include `US` (United States) and `AT` (Austria).
3. Click **Search**.
4. Select the country in the search results. Don't click the link.
5. Select **Import Geography Data** from the **Actions** menu.

   > **Note:** The Import Geography Data action is disabled if the country isn't available from Loqate or if the country data is already imported.
6. Click **OK** to close the warning message.
7. Click **OK** to close the confirmation message.

The import of larger countries might require several hours to complete. You can track the progress of the import process by selecting **Scheduled Processes** from the Navigator menu.

After the import completes successfully, the **Completed** icon (check mark) replaces **Go to Task** icon in the **Structure Defined** and **Hierarchy Defined** columns on the Manage Geographies page.

Here's a screenshot of the Manage Geographies page with the Completed icons (check marks) highlighted.



The **Geocoding Defined** and **Address Cleansing Defined** columns are used for additional features that you set up separately:

- Geocoding enables mapping features in your application, such as the display of customer locations on a map in the UI. For details, see the Enable Address Mapping topic.
- Address cleansing makes it possible to validate addresses down to the street level. Address cleansing requires you to obtain a separate license for the Address Verification Cloud Service.

Note: The geography data is provided by Loqate is third-party content. As per Oracle policy, this software and documentation may provide access to or information on content and services from third parties. Oracle and its affiliates aren't responsible for and expressly disclaim all warranties of any kind with respect to third-party content and services. Oracle and its affiliates aren't responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.Report any issues with Loqate data to Oracle Support who will contact the appropriate team for correction. Alternatively, you can make manual changes to the geography data by using the Manage Geographies task in the Setup and Maintenance work area.

Related Topics