Oracle Fusion Cloud Sales Automation

Implementing Sales

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F77845-23

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Get Help

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

Get Help in the Applications

Some application pages have help icons to give you access to contextual help. 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. If the page has contextual help, help icons will appear.

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 About This Guide

Audience and Scope

This legacy guide provides you with many of the concepts and procedures you need to implement a sales force automation solution using sales features that were available as of Update 23B. This guide isn't being updated, so you must use it in conjunction with *sales playbooks* and by searching our library of questions and answers on docs.oracle.com. The playbooks and answers cover the newest features and provide the most recent documentation. If you've remaining questions, please post them on Oracle Customer connect.

Refer to the Implementation Reference guide for information on how to extend the application and to implement additional features that aren't covered in this guide.

The name "CX Sales" in this guide refers to the existing sales version that's now being redesigned and replaced by Digital Sales, the next generation of Oracle's sales application (Next Gen Sales). Digital Sales is built on top of the same sales foundation. Because the Digital Sales is still being rolled out, you will need to implement some features in CX Sales for a complete solution.

For some features, you may even decide to have some teams work in CX Sales while other teams work in Digital Sales exclusively. For example, if the business plan, quota, and forecasting features are important to your solution, you may decide to have sales managers work on business plans, quotas, and forecasts in CX Sales. Business plans, quotas, and forecasting are still not available in Digital Sales.

Oracle is focusing on completely replacing, redesigning, and expanding the user-facing functionality. However, the majority of the initial implementation steps are completed in the same CX Sales setup and administration pages as previous releases.

Related Topics

- CX Sales and Digital Sales Features in the Sales Solution
- How to Use This Guide
- Related Guides for Your Sales Implementation
- Oracle Fusion Cloud Sales Automation Implementation Reference guide

Sales Application Interfaces

Oracle Sales supports functionality across multiple interfaces.

- Web access from desktop and laptop for all sales, channel, and partner roles. This is the UI that administrators also use to configure the application. Oracle is currently replacing the existing CX Sales web UI with the new Digital Sales web UI. Some features are available in both web UIs and others only in one during the transition.
- *CX Sales Mobile* app for salespeople to use at or away from their desks.
- *Microsoft 365 for Redwood UX* (alongside Exchange integration) for salespeople to view sales-related information in Microsoft 365.

- *Microsoft Teams* integration for team collaboration on sales deals and view sales information in Teams. Microsoft Teams also integrates with Oracle Sales Assistant. To learn more, see *Set Up Oracle Sales Assistant for Microsoft Teams*.

CX Sales and Digital Sales Features in the Sales Solution

Here's an overview of key new features available in Digital Sales only, features that apply to both CX Sales and Digital Sales, and features that are available only in the CX Sales. CX Sales Mobile and the CX Sales Add-in for Microsoft Outlook work with both CX Sales and Digital Sales.

Because Digital Sales features are built on the same sales foundation, you complete most of the setup in CX Sales administration and setup pages. For example, you use sales territories to assign opportunities and leads in both Digital Sales and CX Sales, but you create and manage those territories in CX Sales.

Features Available Only in the Digital Sales UI

Here are some of the key new features available in Digital Sales that aren't available CX Sales.

Features Specific to Digital Sales

Feature	Description	More Information
Record overviews	Redesigned pages that eliminate clutter and place key information in panels. You update and add information using natural language commands in the Action Bar.	*Anatomy of a Record*
Action Bar	From the Action Bar on every individual record, you can use natural language commands to add information, update individual fields, take actions, filter activities, and search.	*Action Bar at the Top of the Record Overview*
Activities (Activity Stream) panel and page on each record	Accounts, opportunities, contacts, and leads display relevant activities in each record. From the Activities panel and page, you can review email exchanges, notes, call logs, past and future tasks and appointments, as well as recent updates to the record itself.	*Activities*
Email discussions from each record	You can create and review email conversations with contacts directly in each record. You can send emails using the built-in Oracle Email application or from any email client that's hooked up to Microsoft Exchange. Email conversations are saved in Activities for the accounts, leads, opportunities, and contact involved.	*Email Integration Options*

Feature	Description	More Information
Web conference integration	Salespeople can start a Zoom or web conference meeting or schedule a zoom meeting from within their sales application.	*Overview of Web Conference Integration Setup*
Computer Telephony Integration (CTI)	Computer telephony integration (CTI) enables integration of third-party media toolbars. You can display a media toolbar by enabling the Partner CTI Service, and by giving you're signed-in users the Access Partner Media Toolbar privilege that allows access to the toolbar.	*Overview of Computer Telephony Integration (CTI) in Digital Sales*
Key Performance Indicators (Sales Performance)	Sales managers are always looking to boost sales by measuring performance and motivating their teams. The Digital Sales performance feature makes it possible for them to do both by setting up goals and contests.	*About Key Performance Indicators (KPI)*
Sales Recommendations	The application analyzes the text of notes and call logs and recommends appropriate follow-up actions. An action can be either a task or appointment, depending on the text that was entered.	*Recommended Actions from Text Analysis*
Sales Dashboard	Salespeople and sales managers can use the Sales Dashboard to review items that need their immediate attention, including upcoming appointments and tasks. The dashboard can also display tables of information and visualizations from OTBI and from shared saved searches.	*Overview of the Sales Dashboard*
Orchestration	Create processes that guide salespeople through best sales practices for different sales situations. In the current release, you can specify recommended sales processes for opportunity sales methods. At each sale stage in the sales method, you specify what information the salesperson needs to provide and what actions they need to take to move the opportunity to the next sales stage and to complete the sale.	*Guide Salespeople Through Best Practices Using Orchestration*

Features Shared by Both Digital Sales and CX Sales

The UIs for Digital Sales are completely redesigned and you must complete any UI-related setup in VB Studio.

Features Shared by Both Digital Sales and CX Sales

Feature	Explanation	More Information
Search	All Digital Sales features use Adaptive Search. Adaptive Search, a high-performance search engine that provides keyword searching and enhanced filtering capabilities. In CX Sales, some work areas still use the legacy CRM Search.	*Overview of Optional Setup for Adaptive Search*
Home Page	Both use the same home page. Navigation icons are in the Sales and Digital Sales tabs.	*Overview of Navigator and Home Page Configuration*
Security	Starting with this release (23A) ,both CX Sales and Digital Sales use the same sales roles provided by Oracle, including Sales Representative and Sales Manager.	*Overview of Users and Security*
Sales Resources, Roles, and Sales Organizations	You set up users as resources, as you do in CX Sales.	*Overview of Users and Security*
Accounts work area	Redesigned UI for Digital Sales. The CX Sales version is still available in the Sales tab on the home page.	*Account and Contact Basics*
Contacts work area	Redesigned UI for Digital Sales. The CX Sales version is still available in the Sales tab on the home page.	*Account and Contact Basics*
Leads work area	Redesigned UI for Digital Sales. The CX Sales version is still available in the Sales tab on the home page.	*Overview of Leads Setup*
Opportunities work area	Redesigned UI for Digital Sales. Many features, such as Sales Methods are shared. However, some features, such as Sales Coach and Assessment Templates, are only available in CX Sales as they are being replaced with other features in Digital Sales. The CX Sales version is still available in the Sales tab on the home page.	*Summary of Opportunity Setup*
Sales Catalog	Redesigned UI for Digital Sales.	*Overview of the Sales Catalog*
Sales Territories and Assignment	Sales territories are managed in CX Sales UIs, but they are used in both Digital Sales and CX Sales.	*Overview of Sales Territory and Assignment Setup*
Tasks and Appointments	Redesigned UI for Digital Sales. Tasks and appointments are tracked in Activities in individual records and using the Activities Work area and Sales Dashboard.	*Overview of Appointments and Tasks*
Task Templates	You can use Task Templates to create tasks for opportunities at different sales stages for both UIs. Digital salespeople can use Task Templates only in CX Sales, however. This technology is slated for replacement by Sales Orchestration.	*Add Task Templates to Sales Stages*

Feature	Explanation	More Information
Activities work area	Redesigned UI for Digital Sales. In Digital Sales, you come here to manage tasks and appointments. CX Sales includes a calendar that isn't available in Digital Sales. In Digital Sales, salespeople use Microsoft 365 instead.	For Digital Sales, see the topic: *Overview of Activities Setup* For CX Sales, see the Activities chapter in the Implementation Reference guide starting with the topic: *Overview of Activities*
Notifications (Bell Icon)	You can open the same notifications in both UIs. Clicking on notification links in CX Sales pages opens CX Sales work areas. Clicking on the same link in Digital Sales UIs, opens Digital Sales pages.	*Overview of Notifications Setup*
Competitors	Salespeople may be required to enter competitors when closing opportunities in both Digital Sales and CX Sales. You can create competitors in both in the Setup Assistant and in the CX Sales work area. However, you must enter competitor details and can edit competitors only in CX Sales.	*About Sales Competitors*
Application Composer	You use Application Composer to create custom fields for both Digital Sales and CX Sales. For CX Sales, you can also use Application Composer to expose those fields on the CX Sales UIs. For Digital Sales, you must use a different tool, VB Studio, to expose fields on UI pages.	*About Application Composer*
Rollups	Rollups summarize data for an attribute of a business object and its related objects. For example, a rollup can calculate the sum of the potential revenue from the opportunities for an account and its hierarchy within the last 120 days.	*What are rollups?*
Enrichment with Data as a Service (DaaS)	You can enrich account and contact information with Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B), a service that provides you with information for millions of companies worldwide. A separate service, Oracle Address, Email, and Phone Verification, ensures that you have the correct postal addresses, that your emails don't bounce, and your calls go through.	See the topic: • *Two Services to Enrich and Verify Your Data and Save Salespeople Time*
Integration with LinkedIn	Digital Sales integrates with LinkedIn Sales Navigator and maps LinkedIn profiles with sales contacts. Salespeople can view a LinkedIn profile, find an icebreaker to connect with the contact, and get introduced to the contact. They can send in-mails or messages from LinkedIn to stay connected - all with the goal of improving sale prospects.	*Overview of LinkedIn Sales Navigator*
Sales Machine Learning	Use the Sales Machine Learning model in the sales application as a platform to build machine learning models that identify and fetch similar accounts from a data pool.	*Overview of Sales Machine Learning*
Phone number and email address verification	When your sales organization subscribes to the Oracle Address, Email, and Phone Verification	*Enable the Verification of Addresses, Emails, and Phone Numbers*

Feature	Explanation	More Information
	service, you know right away if you entered an invalid phone number or email address.	
Routines	Automate routine tasks and enforce sales process compliance. For example, to reduce risk and enforce data integrity, you can create routines to update fields, send email notifications, and create tasks based on rules. Routines can help salespeople be more efficient and productive.	*Automate Repeated Tasks with Routines*
Mass Update	Enables the update of multiple fields in multiple records listed on the page.	*Enable Mass Update*

CX Sales-Only Features

Many features not included in Digital Sales are being completely reengineered. For example, in CX Sales, you can provide salespeople with different tasks, suggestions, and documents at each opportunity sales stage using Sales Coach and task templates. Digital Sales is transitioning to a completely different technology, called Sales Orchestration, to do the same thing and more. In the near future, you will be able to use Sales Orchestration to create sales processes with many type of actions and branches. Using a process, you will be able to create tasks, schedule appointments and calls, and send emails, depending on the information salespeople provide.

Features Available Only in CX Sales UIs

Functionality or Feature	Description	More Information
Business Plans	Use business plans to plan account activities.	*Overview of Business Plans*
Products work area	Enables you to create and view products in CX Sales. Products are used in Digital Sales, but you must either import them or create them in the CX Sales work area.	*Overview of Working with Sales Products*
Forecasting	Lets your sales organization submit sales forecasts that salespeople and their managers can adjust and pass up the management hierarchy.	*How Forecasting Works and How You Can Change It*
Quotas	Lets you set up and manage sales quotas for salespeople.	*Overview of Sales Quotas*
Resource Directory	Lets users view and manage the resource directory.	*How do I enable desktop pages for Resource Directory?*
Promotions	Manage promotions and offer discounts.	*Overview of Sales Promotions*
Assets	Assets track what products and product groups the customer purchased from the sales catalog.	*Overview of Setting Up Sales Assets*
Price Books	Lists of products with prices that can be used with sales and contracts applications.	*Overview of Price Books*

Functionality or Feature	Description	More Information
Click to Edit	The click-to-edit feature lets salespeople edit records directly from landing pages of CX Sales work areas.	*About Click to Edit*
Favorites	Feature you can use in CX Sales to bookmark your favorite records. In Digital Sales, you use the browser instead.	*Mark Favorite Records* To create a list of favorite setup tasks, you must follow this procedure step by step: *Speed up Access to Setup Tasks by Marking Them as Favorites*
Assessment Templates	Questionnaires that let you score leads and opportunities to recommend actions. This feature is being replaced by the Orchestration Framework.	*Overview of Assessments*
Global Search	Enables keyword search across objects in CX Sales UIs.	*Global Search UI*
Search and Saved Searches in legacy work areas	Search in legacy work areas. Those work areas that don't yet use Adaptive Search use CRM search.	*Overview of Work Area Search Setup Configure Default Search in Subtabs*
Workspace	Work area where salespeople can manage all of their sales information in one place. In Digital Sales, you use the work areas for the different objects.	*Workspace and Work Areas Powered by Adaptive Search*
Infolets powered by Adaptive Search (Workspace Infolets)	Home page information portlets that let salespeople review key sales information. Infolets are replaced by the Sales Dashboard in Digital Sales.	*About Workspace Infolets*
Analytics work area and page	The Analytics page shows up to five of a salesperson's favorite analyses for easy access.	*Overview of Sales Analytics Pages*
Lightbox	Allows the sales organization to share presentations and other documents and comment on them.	*Overview of Sales Lightbox*

How to Use This Guide

This guide assumes that you use the Setup Assistant setup wizard to start your implementation. It covers the setup steps you must complete manually after you run the Setup Assistant.

This guide also explains how to import the data you need for setup using Excel macros provided by Oracle on the Oracle support portal. It doesn't cover Import Management or Export Management.

The guide doesn't cover in detail all the manual equivalents for the steps the Setup Assistant automates. You can find these in the Implementation Reference guide.

Here's how to use the guide:

1. Plan out which features your organization will be using and which UIs you will use. See the topic *CX Sales and Digital Sales Features in the Sales Solution* for an overview of the features available in each UI.

2. Before starting the implementation, familiarize yourself with the information you must enter in Setup Assistant and what Setup Assistant completes for you. See the topic *What Setup Assistant Completes for You*.
3. Refer to the chapters in the guide to understand the different features Setup Assistant automates and the manual tasks required after you run Setup Assistant.
4. Run Setup Assistant.
5. Complete the manual setup tasks in the chapters in the order the chapters are listed. Each chapter includes a setup overview with key setup tasks for both the Digital Sales UI and CX Sales UIs. Some of the chapters and setup tasks have dependencies on what you have already completed, so you should work your way down the table of contents. For example, you can't import contacts before you import accounts.

Related Guides

This guide covers only key setups for your sales solution. You must refer to other guides for additional information.

Implementation Guides

Here's a list of related implementation guides:

Guide	Description
Oracle Fusion Cloud Sales Automation: Implementing Customer Data Management for Sales and Fusion Service	Contains information to help implementors define the setup for managing customer information and the configuration for customer hub deployment.
Oracle Fusion Cloud Sales Automation: Implementation Reference	Contains reference information and procedures needed to implement sales components and features not covered in this guide.
Oracle Fusion Cloud Sales Automation: Securing Sales and Fusion Service	Contains information to help setup users and sales administrators configure access to sales functionality and data.
Oracle Fusion Cloud Sales Automation: Security Reference for Sales and Fusion Service	Provides a reference for roles, role hierarchies, privileges, and policies delivered for the Sales and Service offerings.
Oracle Cloud: Using Data as a Service	Describes how to use Data as a Service (DaaS) to update company and contact data in your Oracle Cloud application.
Oracle Cloud: Using Oracle Address Verification Cloud	Describes how to use Oracle Address Verification Cloud to verify and standardize addresses in your Oracle Cloud application.

User Guides

Here's a list of useful user guides:

Guide	Description
Oracle CX Using Customer Data Management for Sales and Fusion Service	Contains information about managing customer information and customer data quality.
Oracle Sales Using Sales	Contains information about performing day-to-day sales tasks.

Analytics Guides

Here's a list of analytics and reports guides:

Guide	Description
Oracle Sales Creating and Administering Analytics	Contains information about reports and analytics provided by Oracle and explains how to create your own reports, analytics, and dashboards.

Configuration Guides

Here's a list of useful configuration guides.

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

Common Applications Guides

Here are some Oracle cloud guides covering common features.

Guide	Description
Oracle Applications Cloud Using Functional Setup Manager	Describes how to use Oracle Functional Setup Manager (also known as the Setup and Maintenance work area) to implement the applications.
Oracle Applications Cloud Understanding Enterprise Structures	Explains how to use the Oracle Fusion Applications enterprise structures to meet your company's legal and management objectives.
Oracle Applications Cloud Using Common Features	Provides an overview of the application functionality that is common across the applications.

Guide	Description

2 Get Started

Overview of Preliminary Tasks

Before you roll up your sleeves and start implementing your sales application, complete these preliminary tasks:

Step	Where to Get More Details
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 (support.oracle.com).	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 Enable the Sales and Service offerings for implementation. The Service offering includes tasks required to set up the telephony integration for Sales.	See *How can I enable Oracle Sales in the Redwood User Experience?*
Step 4 The latest ("fragments") version of Sales in the Redwood UX is now enabled for all new customers. If you're an existing customer, then you must enable the latest version in Setup and Maintenance by checking both the **Digital Sales Next Gen UI** and **Sales in the Redwood UX** features in the Sales offering.	See *How can I enable Oracle Sales in the Redwood User Experience?*
Step 5 Optionally, display the Redwood Sales tab as the first tab users see when they sign in.	See *Display the Redwood Sales Tab When You Open the Home Page*

Toolbar Icons and What They Mean

You can use the top of your application page for navigation, configuration, and other tasks that are common across applications. Here are few features useful in your setup. You can get more information on using common application features from the Oracle Applications Cloud Using Common Features guide.

Callout Number	Icon Name or Description	Function
1	Navigator	Gets you to where you need to go. The Navigator includes more selections than the icons on the home page.
2	Company logo	You can upload your own as part of home page setup.
3	Home	Returns you to the page defined as the home page. By default, home is the Welcome page displaying the different work area icons. The Welcome page is also called the springboard.
4	Favorites and Recent Items	Marks a page as favorite and provides access to recently viewed pages and setup tasks. To create a list of favorite setup tasks, follow the procedure: *Speed up Access to Setup Tasks by Marking Them as Favorites*
5	Watchlist	Not used in the sales application. Watchlist enables the tracking of business objects in some applications.
6	Notifications	Accesses application notifications. Some of these are also delivered using email.
7	Settings and Actions menu	Opens the Settings and Actions menu. From the menu, you can sign out, personalize and configure the UI, turn on and access help, and navigate to the Setup and Maintenance work area.



Speed up Access to Setup Tasks by Marking Them as Favorites

Keep a list of your setup tasks in the Favorites and Recent Items menu (the star icon in the toolbar) , so you can access them with one click. To add a task to the list, you must follow the exact navigation path in this procedure. You must open the task by going to Offerings first.

1. In the Navigator, click **My Enterprise** > **Offerings**.
2. Click the **Sales** offering.
3. Click **View Features**.
4. On the Opt In: Sales page, click **Setup** for **Sales**, the topmost row.
5. Find and open the task you want to mark as favorite.
6. With the task open, click **Favorites and Recent Items** (the star icon) at the top of the page.
7. In the Favorites and Recent Items window, click **Add to Favorites**.
8. In the Add to Favorites dialog box, you have the option of creating a folder, or just click **Save and Close**.
9. You can cancel out of the task and open another task to add to favorites in the same way.

Results:

You can now open the tasks you added as favorites from the Favorites and Recent Items (star icon) menu.

What to Do After You Get Your Welcome Email

Got the welcome email? Here's what to do next. When your environment is ready, Oracle sends an email to the person designated as the administrator when you signed up with the service. This email includes the link to your service, a temporary password, and instructions on how to access the Service Administrator Action List. You must follow the instructions in the action list before signing in for the first time.

When you sign in for the first time, reset your password by clicking your user initials at the top-right of the Welcome page and selecting **Set Preferences** from the **Settings and Actions** menu.

Enable Sales Features for Setup

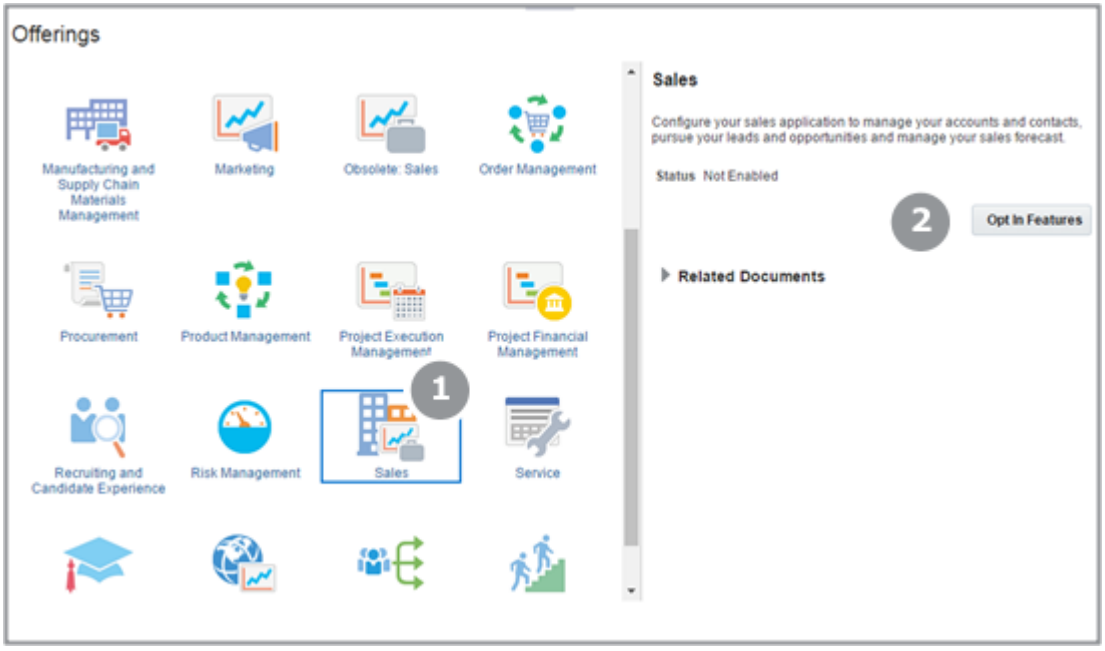
Before you start work, you must enable both the Sales and Service offerings and the functional areas you're implementing. Enabling the offerings and their functional areas provides access to setup tasks and displays icons in your application. You can always enable more functional areas later.

Although you're setting up sales, you must enable Service to run CTI.

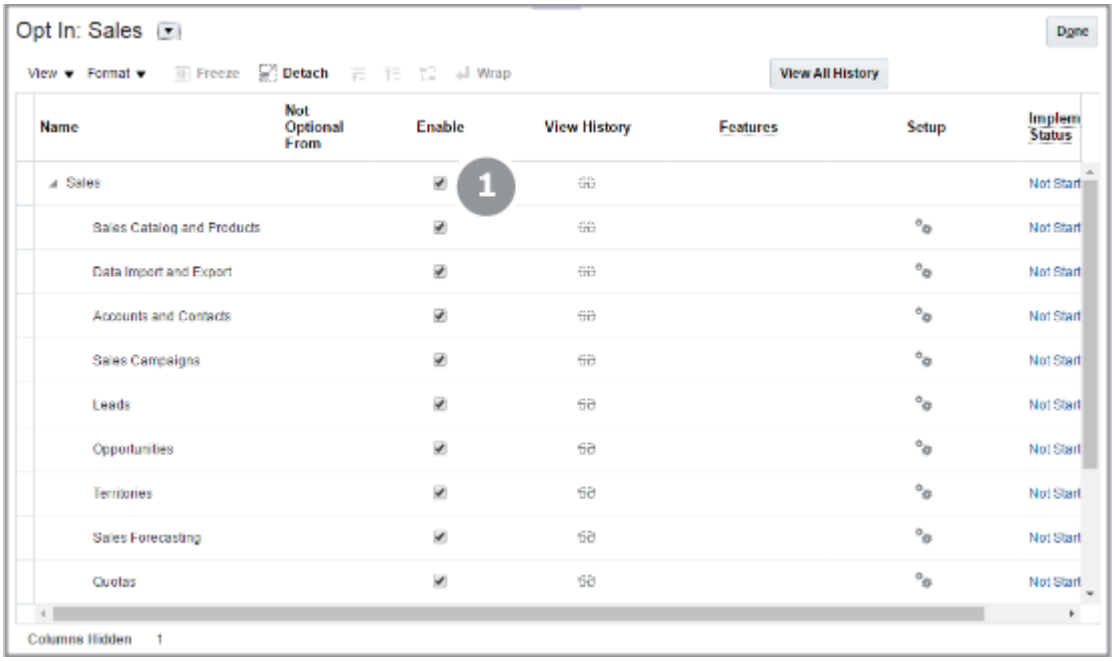
Enable the Sales Offering

1. In the Navigator, click **My Enterprise** > **Offerings**.

2. Click the **Sales** offering icon in the left pane of the Offerings page (callout 1 in the screenshot).



3. Click **Opt In Features** (callout 2).
4. On the Opt In: Sales page, select the **Enable** option for **Sales**, the folder at the top of the list (callout 1 in the screenshot). Your selection enables the offering.



> **Note:** If you enabled other offerings, you may have 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 the sales functional areas you're using. For the tasks in the scope of this guide, enable all of the functional areas through Quotas.
6. Click **Done**.

You're returned back to the Offerings page.

7. 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 left pane of the Offerings page.
3. Click **Opt In Features**.
4. On the Opt In: Service page, select the **Enable** for **Service**, the folder at the top of the list, and the **Redwood User Interface for Service** option at the bottom of the page.
5. Select the **Enable** option for all the service functional areas you're using.
6. Click **Done**.

   You're returned back to the Offerings page.
7. Click **Home** in the global header to return to the Welcome page.

Display the Redwood Sales Tab When You Open the Home Page

You can have the Redwood Sales tab open on the home page when users sign in by moving it to the first position in the list of tabs.

Here's how:

1. Navigate to **Configuration** > **Sandboxes**.
2. Click **Create Sandbox**.
3. In the Create Sandbox page, enter a name and select **Structure** as the tool.
4. Click **Create and Enter**.

   The Sandbox toolbar appears at the top of the page.
5. From **Tools**, select **Structure** to open the Structure page.
6. Locate and select the **Redwood Sales** entry in the Navigation Configuration tab of the Structure tool .
7. Click **Move Up** (the up arrow on the right) to move it up to the top of the list.
8. Optionally, you can check how the home page looks by clicking **Home** in the toolbar at the top of the page.
9. Publish the sandbox by clicking the sandbox name and **Publish**.

Options for Importing Data Into Your Application

Here's an overview of the multiple ways you can import your data from a file or directly from an external application. Which import method you use depends on the type of data you're importing, the volume of data, and technical requirements. If you're integrating your sales application with other cloud services, then you may be required to use additional import methods not covered here.

Whichever import method you use, you must make sure that any prerequisite records already exist in the application. For example, if you're importing contacts for an account, then the account must already exist in the application. If you're

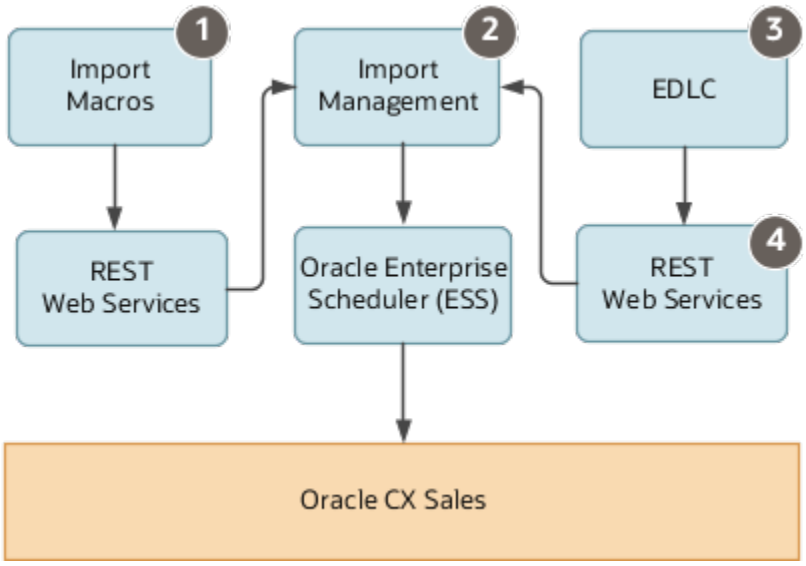
importing data that depends on other data, then the prerequisite import process must complete successfully before you start the dependent process.

Import Method	Description	When to Use	How to Access	Where to Get More Information
Import Macros	The Excel macros speed up and simplify the import of up to 5,000 records at a time for some objects. The macros help you by validating your data entries, providing lists of values, and automatically populating constant values. The macros create data files that are imported automatically. Macros are available to import the following types of sales information: • Sales users • Products • Product groups • Accounts and the account hierarchy • Contacts • Leads • Opportunities • Opportunity revenue lines	Use the import macros for importing data in your initial deployment. The macros are targeted to the simple proof of concept sales automation use case covered in this guide. For example, the import macros assume that you're importing account, contact, and lead records for one country at a time. The macros generate log files of the actual data that's imported, including the values populated for you. The log files can serve as a learning tool for more complex import.	You can download the Excel macros and any required mapping files from the Oracle CX Sales: Getting Started with Your Sales Implementation: Import Macros (Document ID 2229503.1) article on My Oracle Support.	The different chapters in this guide provide detailed instructions for using the macros.
Import Management	Use Import Management to import data files (.csv) with up to 50,000 records. Import Management improves definition, error handling, and performance. For example, you can drag and drop attributes while creating import mappings. The import also validates the first ten records in your data file before you import the rest. You don't have to wait around to see if your data meets the import requirements. Import Management supports import for all sales objects and the majority of other objects as well.	Use Import Management for importing data .	Click **Import Management** in the Navigator.	See the *Understanding Import and Export Management* guide for instructions on using the import.

Import Method	Description	When to Use	How to Access	Where to Get More Information
External Data Loader Client	The data loader is a command-line tool you can use to import high-volume data files. The tool supports the same objects as Import Management. The tool automatically splits a large data file into multiple smaller files to adhere to the application's import volume limits, and enables the tracking of import status.	Use this import method for importing very large data files for the same objects supported by Import Management.	You can download the client from Oracle Support Document 2325249.1 (External Data Loader Client) on My Oracle Support.	Instructions for using the client are available in the document and in the client itself. For REST API documentation, see the *REST API for CX Sales and B2B Service* guide.
Web Services	Web services let you Import data directly from other applications. You can manage Import Management imports using REST web services.	Use web services to manage import jobs if you need to import directly from an external application.	Public APIs are available for Import Management and REST services. The REST services include the following: • Import Activities • Import Activity Maps • Import Export Objects Metadata	For REST API documentation, see the *REST API for CX Sales and B2B Service* guide. For SOAP API documentation, see the *SOAP Web Services for CX Sales and B2B Service* guide.
High-Volume Import	An import mode available in both REST web services and in the External Data Loader Client that is designed to import millions of records at a time. High-Volume Import is available for the following objects: • Account • Asset • Contact • Hierarchy • Hierarchy Member	Use this import mode for importing very large number of records for the set of available objects. You can't use this mode with any custom import logic that you added, including Oracle workflows, ICS triggers, or custom validation.	You can access High-Volume Import either using REST services or using External Data Loader Client. When importing using REST, set the "High-volume" attribute to enable High-Volume Import. When importing using the External Data Loader Client, set the command-line parameter "-high-volume" to enable High-Volume Import.	For REST API documentation, see the *REST API for CX Sales and B2B Service* guide.

Here's a diagram that illustrates the different import methods:

- The import macros (callout 1), Import Management (callout 2), and the External Data Loader Client (callout 5) all use the same Oracle Enterprise Scheduler processes for import. When you import very large files using the EDLC client, the REST web services (callout 4) create multiple processes to respect the Import Management file size limit.
- If you need to import from an external application, then you can use the REST web services directly.



Speed up Import Using Excel Macros

You can speed up import of up to 5,000 records at a time by using Microsoft Excel macros provided by Oracle. The macros validate your data entries, provide lists of values so you don't make mistakes, and automatically populate constant values.

After you enter your data, you click a button in the macro to import. The macros automatically create an import activity for you and permit you to monitor the progress of the import activity from within the macro itself. The import macros are targeted to the simple sales automation use case covered in the guide. They can also serve as a learning tool for more complex import.

The import macros are available for these objects:

- Sales users
- Products
- Product groups
- Accounts
- Account hierarchy
- Contacts
- Addresses
- Leads
- Opportunities
- Opportunity revenue lines

All of the available macros use the new Import Management import feature.

The Import Data with Custom Fields chapter explains how to use the macros to import additional fields, including custom fields you created in Application Composer. You download the Excel macros from the Oracle CX Sales: Getting Started with Your Sales Implementation: Import Macros (Document ID 2229503.1) article on My Oracle Support.

Note: While you can import additional fields by appending columns to the import macros, you can't make any other changes. You can't edit the Visual Basic for Applications (VBA) code or other functions.

3 Run Setup Assistant

Speed Up Your Initial Setup with Setup Assistant

Use the Setup Assistant to automate many of the initial setups in your sales application. You enter the minimum required information directly in Setup Assistant or gather the information offline using an Excel template. Setup Assistant then runs background processes that complete many of the initial setups for you.

Watch video

You can use Setup Assistant for Sales stand-alone implementations as well as implementations on top of other Oracle Fusion Cloud applications.

You can run Setup Assistant up to five times to add information, but you can't use it to change much of what you enter 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 designate as the top of the resource hierarchy. You must use manual setup tasks to make these corrections.

Related Topics

- What Setup Assistant Completes for You
- Overview of Setup with Setup Assistant
- Run Setup Assistant

Overview of Setup with Setup Assistant

Here are the steps you should follow to automate your initial setups with Setup Assistant:

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Digital Sales and CX Sales	Familiarize yourself with the initial setups that Setup Assistant automates for you. You need to make some implementation decisions before you start.	N/A	See the topic: *What Setup Assistant Completes for You*
2	Both Digital Sales and CX Sales	Gather the information you will enter. Descriptions are available in the Setup Assistant wizard itself and in the Excel spreadsheet you can download.	**Setup and Maintenance** > **Sales** > **Company Profile** > **Setup Assistant**	See the topic: *Run Setup Assistant*
3	Both Digital Sales and CX Sales	Run Setup Assistant after you entered the	**Setup and Maintenance** > **Sales** > **Sales**	See the topic: *Run Setup Assistant*

Step	Applies To	Description	Navigation	Where to Get More Details
		data directly in the Setup Assistant UI or imported the data from the spreadsheet.	**Foundation** > **Setup Assistant**	
4	CX Sales	If you enabled Forecast by Opportunity Owner in 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.	**Setup and Maintenance** > **Sales** > **Sales Territories** > **Enable Dimensions and Metrics**	See the topics: • *What are some common opportunity forecasting scenarios?* • *Complete One-Time Manual Step If You Enabled Forecast by Opportunity Owner*
5	Both Digital Sales and CX Sales	Optionally, you can export the setup data you entered into Setup Assistant for import into another environment.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Setup Assistant**	*Export Setup Assistant Data to Another Environment*

What Setup Assistant Completes for You

Here's a table summarizing the information you enter in Setup Assistant, what it does for you, and what other tasks you must complete in the application itself. See the chapters referenced in the last column for details about additional setups you need to complete manually. The Setup Assistant completes some setups without any entries from you. These include the running of indexing processes for global and work area searches, for example. Be sure to check each chapter to learn what's set up for you behind the scenes.

Setup Assistant Section	Setup Assistant Entries and Actions	Steps to Complete Manually	More Information
Company Information	You enter the company name, street address, country, and the corporate currency. Setup Assistant creates a rudimentary enterprise structure required for Oracle Fusion Cloud applications. Except for the currency, the information you enter doesn't appear anywhere in your sales application. The currency you select becomes the default currency in your sales transactions. You can't modify this information using Setup Assistant in subsequent runs.	If you need to change the corporate currency after you run Setup Assistant for the first time, then you can do so in the Sales offering, by using the Quick Setup for the Company Profile functional area.	*Enter Your Company Information and Corporate Currency*

Setup Assistant Section	Setup Assistant Entries and Actions	Steps to Complete Manually	More Information
Accounting Calendar	Based on your entries, Setup Assistant creates the periods for your sales forecasts, quotas, and reports. 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 may import. You can't make changes after you submit on the first run.	None. In the future, you can generate additional periods and years for forecasting using Manage Accounting Calendar setup task.	*Accounting Calendar Setup Tasks Setup Assistant Completes for You*
Geographies	You can import reference geography data for countries where you do business and enable the countries for address mapping. You can import additional countries in subsequent runs.	You can set up UI validation for CX Sales UIs and import additional countries using the Manage Geographies setup task.	*Setup Assistant and Geography Data*
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 him or her at the top of the hierarchy makes it easier for you to build the rest of the resource hierarchy underneath. The sales application 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 would 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 subsequent runs.	After creating the CEO, you must import the rest of the users or create them manually in the UI.	See the topics: • *Overview of Sales User Import* • *Create Sales Users in the UI*

Setup Assistant Section	Setup Assistant Entries and Actions	Steps to Complete Manually	More Information
Sales Catalog Root Product Group	Sales Assistant creates the top node of your sales catalog. In addition, the application automatically creates all of the prerequisites for creating products, including the units of measure salespeople use to enter product quantity in opportunities. You can't update this information in Setup Assistant on subsequent runs.	You must create the rest of the sales catalog in the application either in the UI or using import. You may also need to create additional units of measure. For example, the application creates Unit, but not Each. If you want to salespeople to use Each for entering products in opportunities, then you must create the unit of measure using the task Manage Units of Measure.	See the topics: • *Overview of Sales Catalog Setup* • *Review Units of Measure for Products*
Resource Roles and Role Mappings	Your entries in Setup 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. Setup assistant creates the accompanying role-provisioning rule automatically. You can add more resource roles on subsequent Setup Assistant runs.	None. You can also create additional resource roles and role-provisioning rules manually, as described in the Get Ready to Create Sales Users chapter.	*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 additional sales methods ahead of time, you can 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 open opportunities, the application automatically enters a default close date for the opportunity 20 days after the opportunity creation date. You can change these defaults.	You must complete these steps outside Setup Assistant: • Modify opportunity statuses • Set up win and loss reasons. • Set up your own sales methods • Set up Sales Coach (CX Sales-only feature)	*Setup Assistant and Opportunities*
Competitors	You can create the competitors salespeople can enter when closing lost opportunities. In Setup Assistant, you enter the basic information including the	None, but you can enter additional competitor details in the CX Sales Competitors work area.	*Review the List of Competitors and Create Additional Ones*

Setup Assistant Section	Setup Assistant Entries and Actions	Steps to Complete Manually	More Information
	organization size, line of business, and threat level. You can create additional competitors on subsequent runs.		
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.	None. 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 as described in this guide. You can't change the setting after your initial Setup Assistant run. You select the option in Setup Assistant and then enable a sales territory dimension as described in the topic: *Complete One-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	• *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*
Adaptive Search	Select all of the sales objects you want to enable for Adaptive Search. You can't enable additional objects in Setup Assistant in subsequent runs. Adaptive Search powers all Digital Sales search. In CX Sales, it powers Workspace and other work areas, global search (the search at the top of the page),	You can make additional fields searchable in Adaptive Search. You can also enable additional 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*

Setup Assistant Section	Setup Assistant Entries and Actions	Steps to Complete Manually	More Information
	REST APIs, and infolets powered by Adaptive Search. The Setup Assistant runs the required indexing process and schedules an hourly index refresh. (This is the equivalent of running a full publish for Adaptive Search.)		

Run Setup Assistant

You can use Setup Assistant to set up a stand-alone sales implementation (the subject of this guide) or to implement sales on top of another Oracle Fusion Cloud application.

Make sure that the required information you enter is correct before clicking the submit button for the first time. While you can run Setup Assistant up to 5 times to add information, you can't use it to change much of what you enter 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 designate as the top of the resource hierarchy. You must use manual setup tasks to make these corrections.

Stand-Alone Sales Implementation

Here's how to use 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.

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

   - Application Implementation Consultant
   - Application Diagnostics Administrator
   - IT Security Manager
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 languages supported by CX Sales.

   If you used the spreadsheet to collect your data, you must upload the data into 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 Setup Assistant. 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 approximately 5 minutes to complete. Contact 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 5 times by clicking **Load More Data**. You can use these subsequent runs to create additional setup users, import geographies for additional 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.
7. If you enabled Forecast by Opportunity Owner in Setup Assistant, then you must complete the manual setup step described in the topic: *Complete One-Time Manual Step If You Enabled Forecast by Opportunity Owner*.

Sales on Top of an Existing Oracle Fusion Cloud Application

Here's how you can use Setup Assistant if you're implementing sales on top of another Oracle Fusion Cloud 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**.

   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 Setup Assistant or elsewhere in the application.
5. 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**.

   The process takes about 5 minutes to complete. Contact 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.
8. You can add more data and run the process as many as 5 times by clicking **Load More Data**. You can use these subsequent runs to create additional setup users, import geographies for additional 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.
9. If you enabled Forecast by Opportunity Owner in Setup Assistant, then you must complete the manual setup step described in the topic: *Complete One-Time Manual Step If You Enabled Forecast by Opportunity Owner*.

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.

How You Get to Setup Tasks Not Covered by Setup Assistant

There are two ways to get to setup tasks not covered by Setup Assistant:

- Open tasks from the Sales offering Setup page in the Setup and Maintenance work area
- Use the Navigator

Get to Your Tasks Using the Setup Page

After you enable the offering, you can open setup tasks, including those not covered in this guide, from the Setup and Maintenance work area Setup page. Here is how:

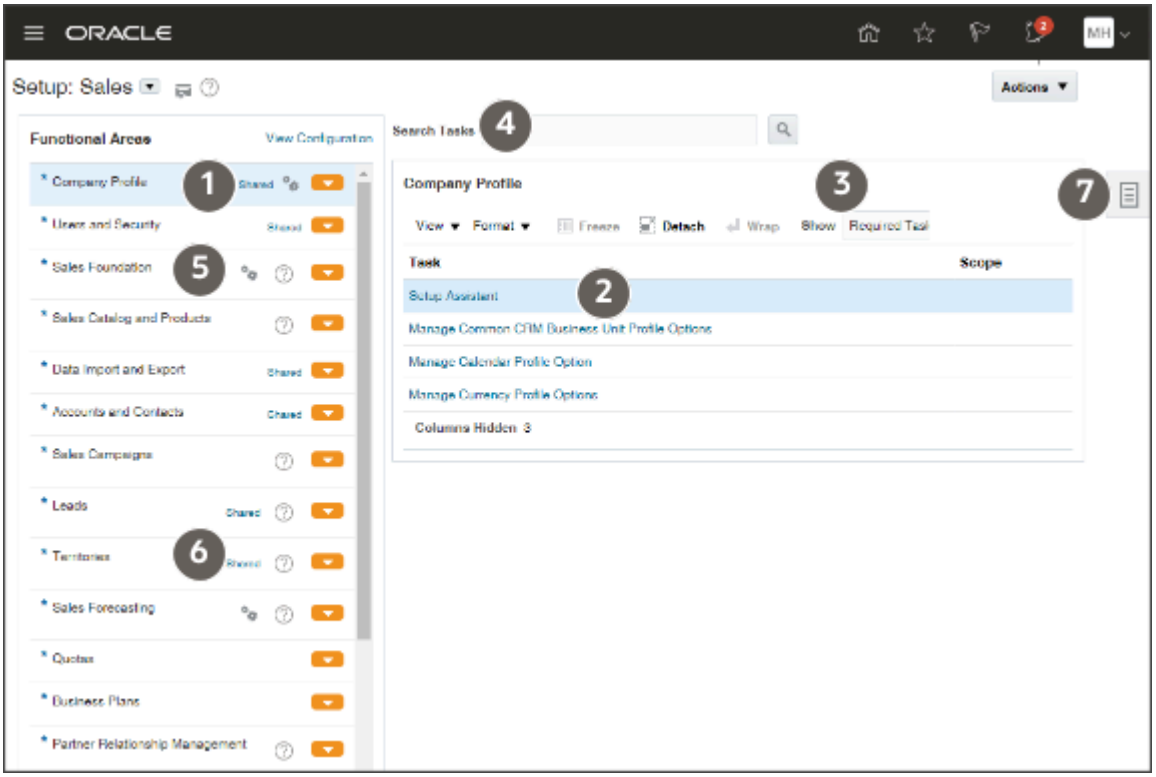
1. In the Navigator, click **My Enterprise** > **Setup and Maintenance**

   You can also click **Setup and Maintenance** icon on your desktop. It's available in the **My Enterprise** tab.
2. If you enabled more than one offering, you may have to select **Sales** from the Setup list. The Setup page displays offerings in alphabetic order.
3. In the **Functional Areas** column, select the functional area you want to set up.

   Here's a rundown of the features on the Setup: Sales page.

Callout Number	Description
1	Select a functional area to set up in the left pane.
2	The application lists the required tasks for that functional area in the right pane.
3	You may need to show All Tasks to see the task you want.
4	You can search for tasks in the offering using the **Search Tasks** field.

Callout Number	Description
5	**Quick Setup** (gear icons) in the Functional Areas column open pages that you can use for basic setup. In Sales, Setup Assistant takes care of these for you.
6	Clicking the **Shared** link lists other offerings using the same functional area.
7	If you can't find the task you are looking for in the Sales offering, you can search for tasks across offerings using the **Tasks** side panel.



4. You can open tasks by clicking on their names in the Task list. By default, you see only the required tasks, but you can select **All Tasks** from the **Show** menu to see them all.
5. You can also search for tasks in the offering by name using **Search Tasks**. Use the percent sign (%) to represent missing letters or words. For example, to find the Manage HCM Role Provisioning Rules task, you can search for `manage hcm%rules`. The searches aren't case-sensitive.
6. Some functional areas include a **Quick Setup** page (gears icon) that you can use to set up the minimum requirements for the functional area. These Quick Setup pages, including those for Company Profile, Sales Foundation, and Opportunities, and Forecasting, cover the same ground as Setup Assistant, so you won't need them.

Navigating to Other Work Areas for Setup

To open some setup tasks and for testing your setup, you must use the Navigator. The Navigator, which you open by clicking its icon at the top of the page, lists what's available to you based on your security permissions. Because a setup

user has a broad range of permissions, the selections you see aren't limited to the features you purchased. Aside from the Setup and Maintenance work area, you use only a small number of the features listed. Here are the most important:

- **My Team**
  - **Users and Roles**

    Use this work area to create and edit records for individual users. The Manage Users task in Setup and Maintenance opens the same work area.
- **Tools**
  - **Scheduled Processes**

    Use this work area for scheduling and monitoring background processes.
- **Configuration**
  - **Appearance**

    Lets you control application appearance, including background color and icon shape.
  - **Structure**

    Lets you control which items appear in the Navigator and on the Welcome page.
  - **Application Composer**

    Use Application Composer to expose fields on page layouts, to create custom fields, and otherwise configure your application.
- **Sales**

  Use the different work areas under this heading for functional setup and to create data used to test your sales application.
- **Digital Sales**

  Setup for some Digital Sales-specific features such as Key Performance Indicators (Sales Performance) area available under this heading.

The Navigator arranges the items in folders. You can open all the folders and display all the items, by clicking **Show More**.

Export Setup Assistant Data to Another Environment

You can export your entries in Setup Assistant to a JSON file, which you can then import into another environment. You can move your initial entries from your test environment to production, for example. Here's how.

1. Click the **Export Data** button on the Setup Assistant landing page.
2. Save the exported JSON file on your desktop.
3. Open the Setup and Maintenance work area in the environment where you want to import and go to the **Setup Assistant** task:
   - Offering: Sales

- Functional Area: Company Profile
- Task: Setup Assistant

4. In the Setup Assistant page, click **Use Excel Spreadsheet**.
5. Upload the file.
6. Click **Import Data**.

4 User Account and Password Preferences

Setup Assistant and User Account Preferences

Setup Assistant uses the default settings when creating setup users and the CEO at the top of the resource hierarchy. You can change the default behavior for the rest of your setup.

Here are the default settings:

- User names are set to email addresses.
- Passwords must be at least 8 characters long and include a number
- The application automatically notifies users when their accounts are created, when passwords need to be changed, and so on

Setup Overview

Review the settings for user name format and password strength and set up notifications before you create users. By default, the application uses the email address to create user names and requires passwords with eight letters and one number.

You may want shorter user names and stronger passwords. You must also create your own versions of the notifications users receive regarding their accounts. Oracle provides sample notifications, but they include Oracle-specific language and may not include all of the information users need.

The Security Console that you use for all these tasks includes many advanced features. Some don't even apply to your sales application. So, limit your use of the Security Console to the scope listed here.

Here's a list of the setup tasks covered in this chapter. You can open the tasks from the Setup and Maintenance work area, Sales offering, and Users and Security functional area. Remember that you may have to show All Tasks to see the task that you want.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Digital Sales and CX Sales	Initialize the Security Console.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Import Users and Roles into Application Security**	See the topic: *Initialize the Security Console*
2	Both Digital Sales and CX Sales	Set up preferences for user name format, passwords, and create your own versions of the notifications that users receive about their accounts and passwords.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Applications Security Preferences**, then select the **User Categories** tab.	To understand the notification process for new accounts and recommendations on the kinds of notification changes you may want to make, see the topic: *Automatic New Account*

Step	Applies To	Description	Navigation	Where to Get More Details
				Notifications and What to Change For setup instructions, including a list of tokens you can use in your notifications, see the topic: *Set Up Preferences for User Names, Passwords, and Notifications*

Related Topics

- Automatic New Account Notifications and What to Change
- Set Up Preferences for User Names, Passwords, and Notifications

The Dos and Don'ts for Using the Security Console

The Security Console is a powerful tool, but you don't need all of its power for your initial setup. Here's an overview of the Security Console tabs and their uses. Only setup users, or other users with the IT Security Manager job role, can access the Security Console.

Tab	Dos and Don'ts
Roles	Create your own roles as described in Securing Sales and Service guide.
Users	• Don't create users or provision job roles here. For sales, you must create users as resources using the Manage Users task, resource import, and REST web services. Follow the instructions in the rest of this guide to create users and provision job roles. If you do create user accounts in the Security Console, then you must create the users again as resources using the Manage Users task and link the accounts you created in the Create Users page. • Use this tab only to manage user passwords and update user email addresses. Note that all users, even members of the sales organization who can't access the Security Console, can reset their own passwords. That's done by clicking the user name in the welcome page and selecting the Preferences option from the Settings and Actions menu. • While you can use this tab to change user names, doing so requires some extra setup for Oracle BI Answers, the embedded reporting tool for building and modifying reports. Oracle BI Answers creates a separate GUID from the user ID when you create a user. If you change the user ID, 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).
Analytics	Review role assignments and compare roles. This advanced security functionality is covered in the Securing Sales and Service guide.
Certificates	The sales application doesn't use this functionality.

Tab	Dos and Don'ts
User Categories	Specify password policies and manage notifications users receive about their accounts and passwords. You can specify different behavior for different categories of users. For the sales application, all the users you create are initially assigned to the Default category. But you can create additional user categories and move users to them.
Single Sign-On	Configure single sign-on.
API Authentication	Used for defining JSON Web Tokens other applications can use to validate themselves with Oracle CX Sales and Fusion Service.
Administration	Use to set role copying preferences and other advanced features covered in the Securing Sales and Service guide.

You can find information about more advanced tasks, including security configuration, in the Securing Sales and Service and the Extending Sales and Service guides.

Initialize the Security Console

You must initialize the Security Console before using it for the first time by running the process Import Users and Roles into Application Security. The process copies users, roles, privileges, and data security policies from the LDAP directory, policy store, and Applications Core Grants schema to Oracle Fusion Applications Security tables. Having this information in the tables makes the search feature of the Security Console fast and reliable. After the process completes the first time, Oracle recommends that you schedule the process to run daily.

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Users and Security
    - Show: All Tasks
    - Task: Import Users and Roles into Application Security
2. On the Import Users and Roles into Application Security page, click **Submit**.

    This action starts the Import User and Role Application Security Data process. After the process completes, you can use the Security Console.
3. Now set up this same process to run daily:
    a. On the Import Users and Roles into Application Security page, click **Advanced**.
    b. Click the **Schedule** tab.
    c. Select the Using a schedule option.
    d. From the **Frequency** list, select **Daily**.
    e. Enter an end date far in the future.
    f. Click **Submit**.

Automatic New Account Notifications and What to Change

For security reasons, users get the sign-in information they need to start using the application in two separate notifications. The first email tells users an account was created for them and includes a link they can use to create their passwords. The second email, which confirms the password reset, includes the user name.

Here's how the process works by default:

1. The application sends the new account notification. The email includes only the link to reset your password. It doesn't list the user name.
2. Users click the link in the email and create their passwords.
3. If users already know their user names, they can sign in to the application right away.
4. The application sends the second password reset confirmation, which includes the user name.
5. If users don't know their user names, they can get the user names from the second notification.

You can view the default notification text by opening the two templates provided by Oracle: ORA New Account Template and ORA Password Reset Confirmation Template in the Security Console. When you create your own templates, the text of the Oracle notification templates is copied automatically to your new template. You can edit the text or replace it with your own.

As set up by Oracle, the application also notifies the user's manager when a user account gets created and when passwords get reset. If you don't want to spam sales managers, you can disable these notifications or replace them with text of your own.

Suggested Changes

At a minimum, change the text of sample notifications to replace Oracle-specific language. You may also want to clarify the process:

- New Account Template:

  Add language that makes it clear that to users that they can get the user name from the notification they receive immediately after they create their passwords.

- Password Reset Confirmation Template

  Modify the text to highlight the user name, so it's easy to spot in the email. When making the edits, remember that users receive this notification every time they reset their passwords, not just the first time they create their password.

For navigation and setup details, including available tokens, see the topic: Set Up Preferences for User Names, Passwords, and Notifications.

Related Topics

- Set Up Preferences for User Names, Passwords, and Notifications

Set Up Preferences for User Names, Passwords, and Notifications

Use the Security Console to set your preferences for user names, passwords, and user notifications. For example, you can require users to set stronger passwords, implement shorter user names, change the text of the notifications your users receive, or turn notifications off completely.

Oracle provides only sample notifications. You must change the Oracle-specific language in the notifications and add additional information users may need. For example, the initial notification users receive about their new account includes a link to create your password. But, for security reasons, Oracle doesn't include the user name. In that initial new account notification, you may want to explain that you get the user name from the subsequent password reset confirmation.

Set Preferences for User Names and Passwords

1. Open the Security Console from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Users and Security
    - Show: All Tasks
    - Task: Manage Applications Security Preferences

    Alternatively, click **Tools** > **Security Console** on the home page.
2. Click **User Categories**.

    On the User Categories tab, you can set up different preferences and notifications for different categories of users. Since all of the sales users you create and import are created in the Default category, you set preferences for that category only.
3. Click **DEFAULT**.

    On the DEFAULT User Category: Details page, you can set the user-name format.
4. Click **Edit**.

5. Select the user-name format you want to use from the **User Name Generation Rule** list.

   The application uses your selection to generate user names unless you enter the user names manually or import them from a file. By default, the application uses the email address as the user name.

   If you're implementing Partner Relationship Management, then you must use email for creating partner contacts. Otherwise, you can use any of the three following options:

   - First name.last name
   - Email
   - First initial and last name

   Don't use **Person or party number** because numbers aren't easily remembered by users. For example, if the person number generated by the application for John Smith is 100000000178803, then the user name is 100000000178803 as well.
6. Selecting the **Generate system user name when generation rule fails** option ensures that the application generates a user name even if there is no information available for the option you selected.
7. Click **Save and Close**.
8. Click the **Password Policy** subtab.
9. Here you can specify password strength and expiration. For example, you can require users to use special characters in passwords and specify how frequently passwords must be changed.
10. Selecting the **Administrator Can Manually Reset Password** option, makes it possible for administrators to manually create new passwords for users.
11. Click **Save and Close**.

Configure Email Notifications and Change the Oracle-Specific Text

In the Notifications subtab on the DEFAULT User Category tab, you can specify which email notifications, if any, are sent to users and the text of those notifications. At present, the application supports text-only notifications in one language.

You can make these changes:

- Turn all notifications on or off.

  By default, all notifications are turned on. If you're setting up a test environment, turn off notifications while creating sales users to prevent the users from signing in to the application while you're setting it up.
- Turn individual notifications on or off.

  By default, all individual notifications are turned on.
- Create your own notifications.

  Oracle provides predefined English-language sample templates with Oracle-specific language. You must create your own templates to provide users with the information they need.

Here's how to configure the email notifications:

1. Click the **Notifications** subtab.

   The subtab lists the default notification templates provided by Oracle. The list includes the events that trigger the notifications and the email subject lines.
2. To make changes, click **Edit**.
3. If you want to turn off all notifications, then deselect the **Enable Notifications** option under the **Notification Preferences** heading.

4. If you want to turn off individual notifications, then:
    a. Click the template name link.
    b. Deselect the **Enabled** check box.
    c. Click **Save and Close**.
5. Here's how to create your own notification templates:
    a. Click **Add Template** and select the event.

       Selecting the event automatically copies over the text provided in the corresponding Oracle template, which you can then edit.
    b. Edit the notification subject line and text.

       Here's a list of the tokens you can include in the message text. Each token must be within curly brackets and preceded by a dollar sign, for example: `${firstName}`.

Token	Meaning	Events
userLoginId	User name	- Forgot user name - Password expired - Password reset confirmation
firstName	User's first name	All events
lastName	User's last name	All events
managerFirstName	Manager's first name	- New account created - manager - Password reset confirmation - manager - Password reset - manager
managerLastName	Manager's last name	- New account created - manager - Password reset confirmation - manager - Password reset - manager
loginURL	URL where the user can sign in	- Expiring external IDP signing certificate - Password expired - Password expiry warning
resetURL	URL where the user can reset his or her password	- New account created - manager - New user created - Password generated - Password reset - Password reset - manager
CRLFX	New line	All events
SP4	Four spaces	All events

Token	Meaning	Events
adminActivityUrl	URL where an administrator initiates an administration activity	Administration activity requested
providerName	External identity provider	Expiring external IDP signing certificate
signingCertDN	Signing certificate	Expiring external IDP signing certificate
signingCertExpiration	Signing certificate expiration date	- Expiring external IDP signing certificate - Expiring service provider signing certificate
encryptionCertExpiration	Encryption certificate expiration date	Expiring service provider encryption certificate
adminFirstName	Administrator's first name	- Administration activity location-based access disabled confirmation - Administration activity single sign-on disabled confirmation
adminLastName	Administrator's last name	- Administration activity location based access disabled confirmation - Administration activity single sign-on disabled confirmation

c. Select the **Enabled** option.
d. Click **Save and Close**.

The predefined template provided by Oracle is automatically disabled. You can only have one template for each event.

6. On the DEFAULT Category: Notifications page, click **Done**.

Set the Synchronization Process Frequency Warning

If you don't like warning messages, read on. Whenever you navigate to the Security Console, you get a warning if the Import User and Role Application Security Data process was not run in the last six hours. If you scheduled the process to run daily, then it makes good sense to change the value of the warning as well.

1. Click the **Administration** subtab.
2. Change the value for the **Hours Since Last Synchronization Job Run Warning**.

Related Topics

- Automatic New Account Notifications and What to Change

5 Setup Users

Setup Overview

Using the Setup Assistant, you can create up to 15 users to help you with setup.

Use this chapter to:

- Create additional setup users.
- Enable the initial user created by Oracle to participate in the setup process.

  The initial user can perform security tasks, such as creating other users and granting setup permissions, but needs the additional privileges granted to setup users.
- Enable setup users to monitor all background processes
- Learn how to reset passwords for users

Here's a list of the setup tasks. You can open the tasks from the Sales offering in the Setup and Maintenance work area. Tasks are organized by functional areas. Remember that you may have to show All Tasks to see the task you want.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Digital Sales and CX Sales	Create other setup users.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Users**	*Create Setup Users*
2	Both Digital Sales and CX Sales	Provision the initial user with the same permissions as the other setup users.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Users**	*Provide the Initial User the Same Permissions as Other Setup Users*
3	Both Digital Sales and CX Sales	Any setup users you create receive an email notification with a link they can use to reset their passwords. If they don't receive the email for some reason, you can reset user passwords and update email addresses in the Security Console. (You can open the Security Console using the task Manage Applications Security Preferences)	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Applications Security Preferences**	See the section: Reset User Passwords and Update Email Addresses To understand the notification process for new accounts and recommendations on the kinds of notification changes you may want to make, see the topic: *Automatic New Account Notifications and What to Change* For setup instructions, see: *Set Up Preferences for User Names, Passwords, and Notifications*

Step	Applies To	Description	Navigation	Where to Get More Details
4	Both Digital Sales and CX Sales	By default, setup users can only see the scheduled processes they themselves submit. Use the Security Console to provide all of the setup users the ability to see what processes are running and their status, no matter who submitted them.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Applications Security Preferences**	See the topic: *Give Users the Permission to View All Scheduled Processes*

About Setup Users and Security

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. This topic provides a brief overview of Oracle's security model, lists the permissions that setup users need, and explains how the provisioning process works.

How Permissions Are Grouped and Provisioned

Oracle uses the Role-Based Access Control (RBAC) security industry standard. The permissions are grouped in two types of roles:

- Job roles, which provide users with the permissions to carry out tasks specific to a job, such as a sales manager or sales administrator
- Abstract roles, which permit users to complete tasks that are common to all employees or resources

You typically provision salespeople with the job roles corresponding to the roles they play in the sales organization (their resource roles), as well as the employee and resource abstract roles. The employee abstract role provides access to reports and personal profile information. Without the resource abstract role, users can't participate in the sales process, create accounts and opportunities, or be assigned to sales teams. You can find the description of each job and abstract role Oracle provides and all the duties that come with it in security reference guides.

When you create users, the application automatically provisions them with the required job roles and abstract roles using role-provisioning rules. Each role-provisioning rule is made up of the rule conditions and the names of the job roles and abstract roles that are assigned to the user if the conditions are met. In the sales application, the job role and the resource abstract role are assigned to a user based on the resource role. The employee abstract role is provisioned to all users of type employee.

As long as you used Setup Assistant, the application creates all the role-provisioning rules you need for setup users and all the standard sales users. If you set up the company information in a different way, then you must create all the role provisioning rules yourself. That's true if you're setting up the application together with Oracle HCM Cloud or another cloud service. You must also create role-provisioning rules for any additional resource roles you create. You can learn more about role-provisioning rules in the Get Ready to Create Sales Users chapter and in the Securing CX Sales and B2B Service guide.

Security Roles Required by Setup Users

To complete the setup tasks in this guide, you must be provisioned with the security roles listed in the table. The initial user provided by Oracle comes provisioned with only the first three. While the initial user can create other users and perform many setup tasks, the initial user can't complete all the tasks without the additional security roles.

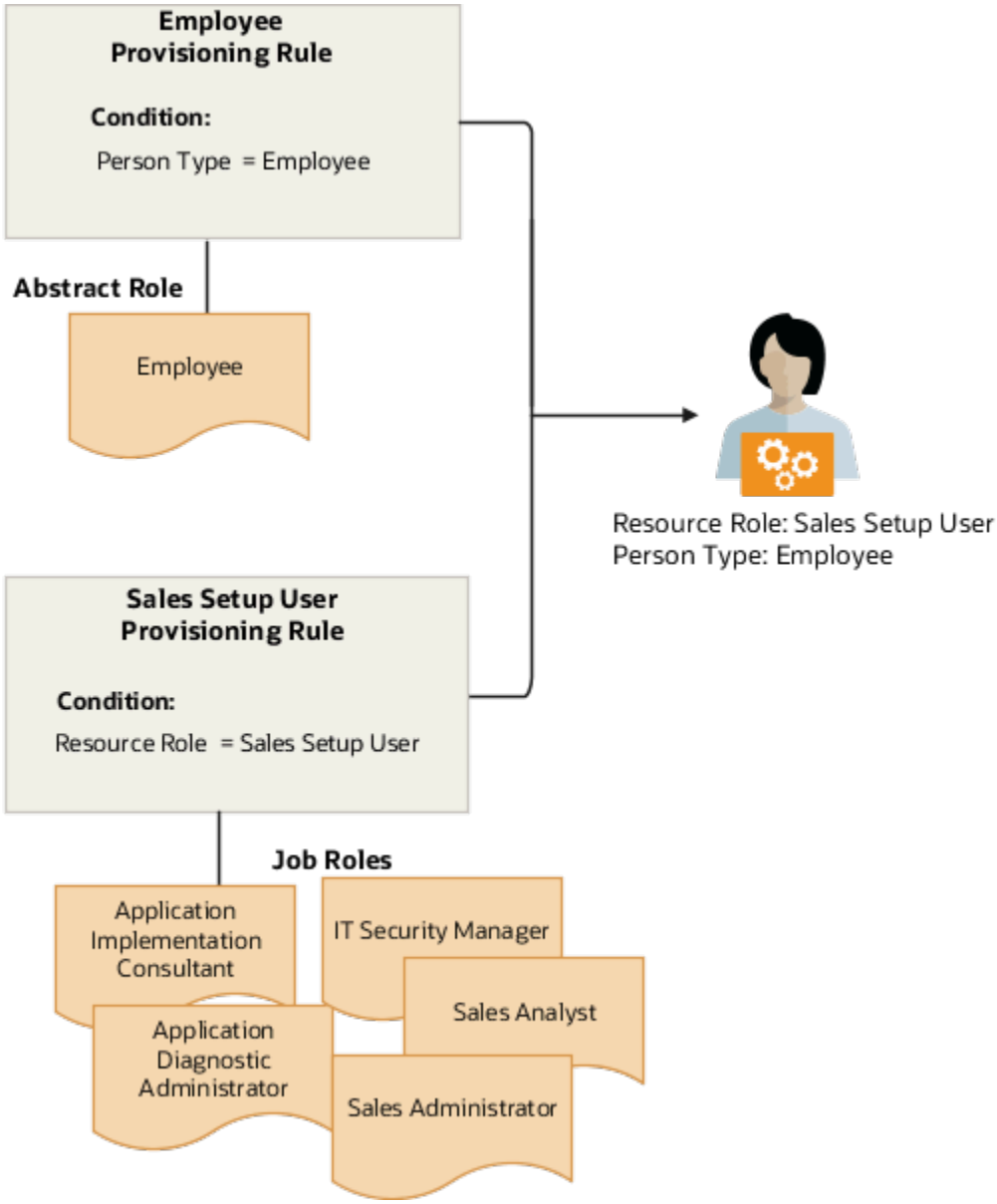
Role	Type	Permissions the Role Provides
Application Implementation Consultant	Job Role	Access all setup tasks across all products
IT Security Manager	Job Role	Access security tasks, including the ability to assign other security roles
Application Diagnostics Administrator	Job Role	Access diagnostic tests and data
Employee	Abstract Role	Access BI reports and run and monitor background processes
Sales Analyst	Job Role	Create sales recommendation rules
Sales Administrator	Job Role	Perform the sales administrator duties

Note: For licensing reasons, use the Application Implementation Consultant role only for the initial setup tasks.

How You Create and Provision Setup Users

To provision the required security roles, just create setup users as users of type employee and assign them the Sales Setup User resource role. It doesn't matter whether the user you're setting up is an actual employee or not. Provided you used Setup Assistant for your initial setup, Oracle creates two role-provisioning rules that do the rest:

- The Employee rule automatically assigns the Employee abstract role to all users of type Employee.
- The Sales Setup User rule automatically assigns all users with the Sales Setup User resource role (the condition), with all of the required job roles.



The setup users you create aren't assigned the Resource abstract role, so they can't participate in the sales process. But there is nothing stopping you from creating other provisioning rules to provision sales administrators or others with the same setup permissions.

Create Setup Users

Follow this procedure to create users who can perform the sales setup discussed in this guide. This procedure applies to both CX Sales and Digital Sales.

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Users and Security
    - Task: Manage Users

    Alternatively, click **Navigator** > **My Team** > **Users and Roles**.
2. On the Search Person page, click **Create**.
3. On the Create User page, in the Personal Details region, enter the user's name and a unique email address.

    The application automatically sends user notifications to this email address unless you disable notifications in the Security Console.
4. In the User Details region, you can 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 email unless you made changes in the Security Console.
5. 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 may be disabled. Check the notification settings in the Security Console.

6. Select these values in the Employment Information region:

Field	Value to Select	Comments
Person Type	Employee	For setup only. The user need not 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.

7. In the Resource Information section, select **Sales Setup User** from the **Resource Role** list.

8. Click **Autoprovision Roles**.

   The **Role Requests** region displays the following roles:

   - Application Diagnostics Administrator
   - Application Implementation Consultant
   - IT Security Manager
   - Employee
   - Sales Analyst
   - Sales Administrator

   The role request process may 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.
9. 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 Resetting User 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.

Related Topics

- Set Up Preferences for User Names, Passwords, and Notifications
- Automatic New Account Notifications and What to Change

Provide the Initial User the Same Permissions as Other Setup Users

Use this procedure to grant the initial user the same permissions as the other setup users. This setup applies to both CX Sales and Digital Sales.

1. Click **Navigator** > **My Team** > **Users and Roles**.

   Alternatively, you can open this task from the Setup and Maintenance work area:

   - Offering: Sales
   - Functional Area: Users and Security
   - Task: Manage Users
2. On the Search Person page, enter the first name of the initial user in the **Keywords** field and click **Search** (the right-arrow icon).
3. Select the name link in the Search Results.
4. On the Edit User page, in the **Resource Information** region, select **Sales Setup User** from the **Resource Role** list.
5. Click **Autoprovision Roles**.

   The **Role Requests** region displays these roles:

- Sales Analyst
- Employee
- Sales Administrator

Your role request process may take a few minutes to complete because it's set to run periodically. You can view the status of the request anytime you edit this user.

6. Click **Save and Close**.

   If you're signed in as the initial user, you must sign out and then sign in again for the new permissions to take effect.

Reset User Passwords and Update Email Addresses

Reset Passwords for Others

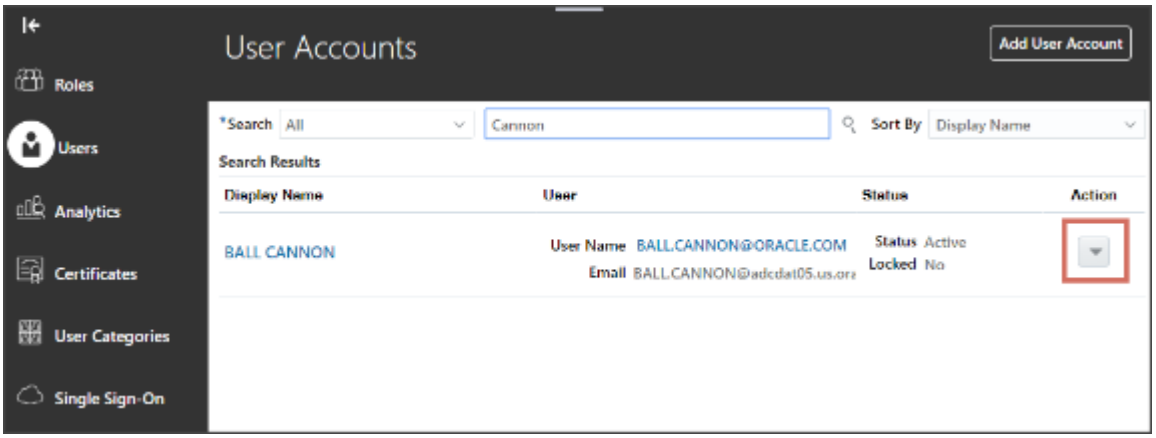
Use the Security Console to reset passwords for other users. Only setup users, and other users with the IT Security Manager job role, can access the Security Console. This setup applies to both CX Sales and Digital Sales.

All users can reset their own passwords by clicking their user name or image, and selecting the **Set Preferences** link in the Settings and Actions menu. They can also reset their passwords by using **Forgot Password** on the sign-in page.

1. Open the Security Console. You have two options:
   - In Setup and Maintenance, go to the following:
     - Offering: Sales
     - Functional Area: Company Profile
     - Show: All Tasks
     - Task: Manage Applications Security Preferences
   - Click **Navigator** > **Tools** > **Security Console**.
2. You can ignore and close any warnings regarding the scheduling of the Import Users and Roles Application Security Data job.
3. Click the **Users** tab.

4. Search for the user using one of the following:
    - First or last name, but not both
    - User name

    Here's a screenshot of the Users tab highlighting the location of the Action menu.



5. From the **Action** menu, select **Reset Password**.
6. In the Reset Password page, you have two options:
    - To send an email to users with a link they can use to create their own passwords, select the **Automatically generate password** option.
    - Reset the password yourself:
        i. Select the **Manually change the password** option.
        ii. Enter the new password twice.

    > **Note:** The manual option is available only if you selected the **Administrator can manually reset password** option while editing the password policy for the DEFAULT user category in the Security Console.

7. Click **Reset Password**.

Related Topics

- Set Up Preferences for User Names, Passwords, and Notifications

Change a User's Email Address

To change sales users' email addresses, use the same import process that you used to create them. You can also use REST services. This setup applies to both CX Sales and Digital Sales.

You can also use these steps to change email addresses on the Users tab in the Security Console work area. However, this method is not always foolproof:

1. Open the Security Console by clicking the **Security Console** link under the **Tools** heading in the Navigator.
2. Click the **Users** tab.

3. Search for the user using one of the following:
    - First or last name, but not both
    - User name
4. Click the user name link.
5. On the User Account Details window, click **Edit**.
6. In the Edit User Account window, edit the email address.

> **Note:** Don't edit any of the other information available on the Edit User Account page. Use the Manage Users task instead.

7. Click **Save and Close**.

Related Topics

- What can I use the Security Console for?

Change Your Password

Use the application link your company gave you to open the Sign In page and change your password for better security. You can use either of these methods to change your password. This setup applies to both CX Sales and Digital Sales.

- After you sign in, you can change your password using the **Set Preferences** option.
- On the Sign In page, you can change your password using the **Forgot Password** link.

Change Your Password Using Set Preferences

1. Click your user image or name in the global header, and on the **Settings and Actions** menu, select **Set Preferences**.
2. In the General Preferences section, click **Password**, and enter your password details.
3. Click **Save and Close**.

Change Your Password Using Forgot Password

1. On the Sign In page, click the **Forgot Password** link.
2. Enter the registered work email, select the Forgot Password option and click **Submit**.

   A notification containing a link to reset your password is sent to your work email.

> **Note:**
> - If you don’t have your work email registered, the notification is sent to your line manager.
> - If both you and your line manager don’t have work emails registered, you’ll not be able to reset your password. Contact your security administrator to register your work email.

This table shows which method you can use for resetting passwords based on your Single Sign-On (SSO) configuration.

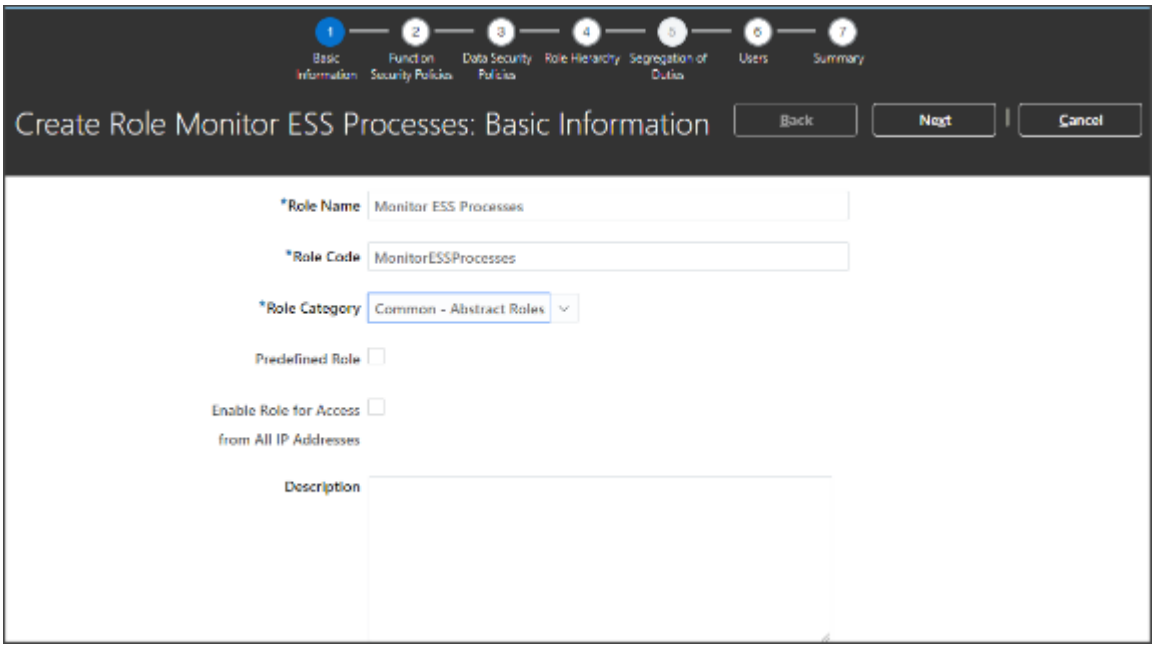
SSO Configuration	Password Reset Method to Use	
	Set Preferences Option	Forgot Password Link
SSO Disabled	Yes	Yes
SSO Enabled	No	No
SSO with Chooser Enabled (both SSO sign-in and local authentication options are available)	No	Yes

Give Users the Permission to View All Scheduled Processes

Your application setup requires you to run numerous scheduled processes and ensure they complete successfully. By default, users can only see the scheduled processes they themselves submit. By creating a custom role in the Security Console and assigning all of the setup users to it, you ensure that everyone can see what processes are running and their status, no matter who submitted them. This setup applies to both CX Sales and Digital Sales.

1. Open the **Security Console**.
2. Click the **Roles** tab.
3. On the Roles tab, click **Create Role**.

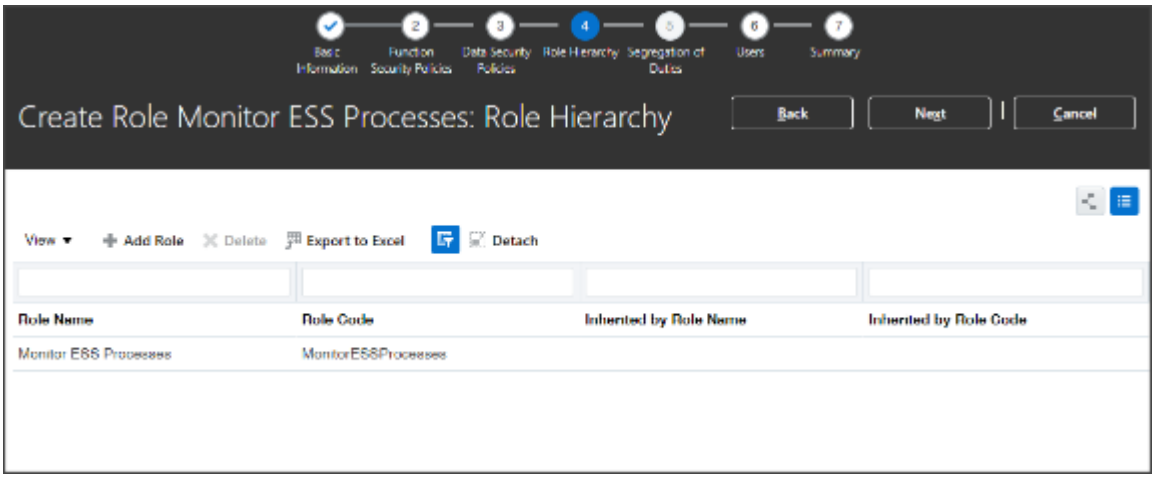
   The Create Role page displays a series of steps you can click directly or reach using the **Next** button.



4. In the Create Role: Basic Information step, make the following entries:

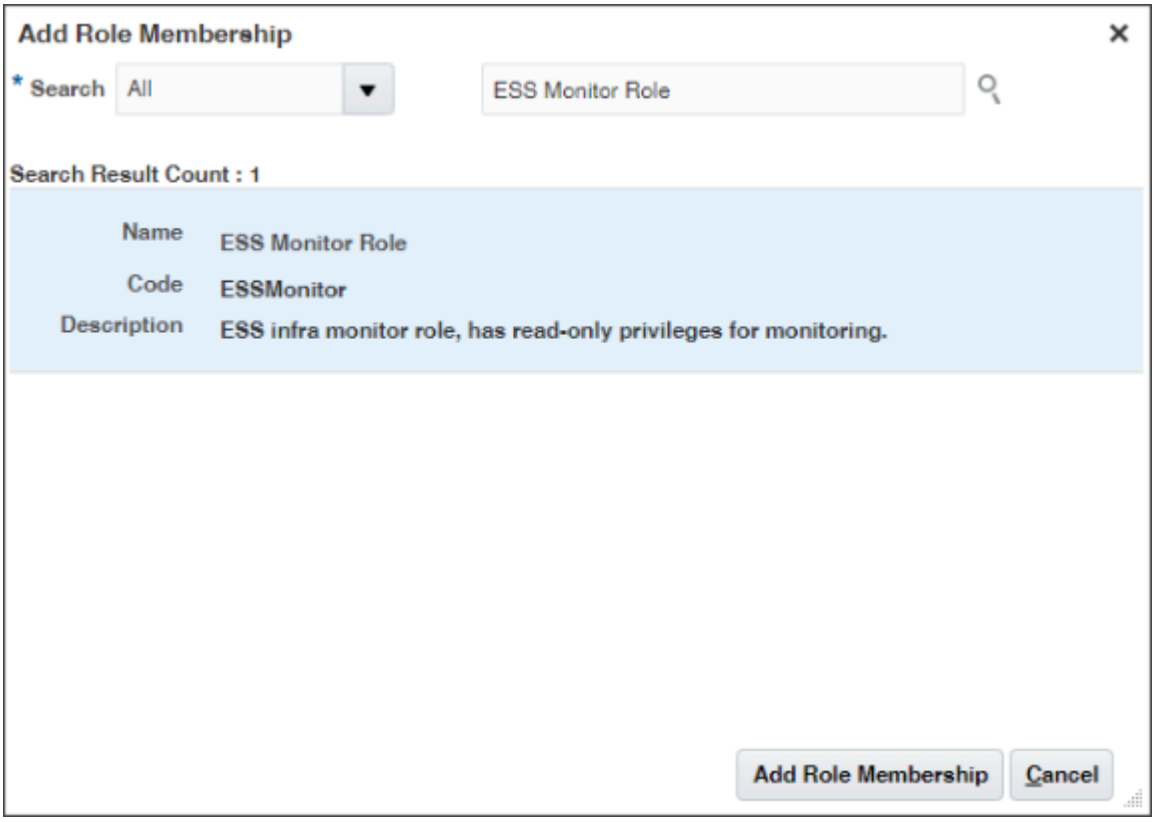
Field	Suggested Entry
Role Name	Monitor ESS Processes
Role Code	MonitorESSProcesses
Role Category	Common -Abstract Roles

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. Click **Cancel** to close 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 are 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. Click **Save and Close**.

    The users you added to the role can now monitor all of the scheduled processes in the **Schedule Processes** work area.

6 Accounting Calendar

How the Accounting Calendar Impacts Forecasting and Other Sales Features

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. Your sales application uses these defined periods, often called enterprise periods, for multiple purposes.

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 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 permit 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 cannot 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.

Accounting Calendar Setup Tasks Setup Assistant Completes for You

The entries you make in Setup Assistant completes all of the tasks you need to create the accounting calendar and enable it for use in your sales application:

- 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 Accounting Calendar Default.
- Enables the calendar to be used in analytics and report by running the Refresh Denormalized Time Dimension Table for BI process.

Follow the procedures in this chapter to review the accounting calendar that was created for you and, if required, to create additional forecast periods in the future.

Review the Accounting Calendar and Generate Additional Forecasting Periods

You can review the accounting calendar Setup Assistant created for you. Optionally, you can generate forecasting periods for additional years in the future in your review.

If you need to make other changes to the accounting calendar, if you need to start the calendar in an earlier year, for example, then you must create a new accounting calendar. See the *Create the Accounting Calendar* topic in the Implementation Reference guide. You can't create a different accounting calendar after you start using your calendar for forecasting and reporting.

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Company Profile
    - Task: Manage Accounting Calendars
2. On the Manage Accounting Calendars page, click the name of the calendar created for you by Setup Assistant.
3. The Edit Accounting Calendar page displays the periods created for you by year from the starting date you entered in Setup Assistant. You can change the year format and generate periods for additional years.
4. Here's how to generate periods for additional years. For each year, do the following:
    a. On the Edit Accounting Calendar page, click **Add Year**.
    b. Click **Save**.
5. When you complete adding all the years, click **Save and Close**.
6. Click **Done**.

Related Topics

- Create the Accounting Calendar

7 Geography Data

Setup Overview

Import and set up reference geography data for the countries where you do business. Importing the reference geography data makes it possible for you to set up validation for address elements such as states and cities to prevent address data entry errors.

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 in the world at a fraction of a penny a piece. However, it's a good idea to import and set up the geography data anyway. An extra bit of validation can't hurt. Besides, the geography data you import is a shared resource that's used by HCM, supply chain, and financials cloud services, and it's free!

Oracle licenses geography data from Loqate that you can import, at no additional cost. Alternatively, 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.

Here's the list of the setup tasks. You can open the tasks from the Sales offering in the Setup and Maintenance work area. Tasks are organized by functional areas. Remember that you may have to show All Tasks to see the task that you want.

Step	Applies To	Description	Functional Area and Task Name	Where to Get More Details
1	Both Digital Sales and CX Sales	You can import the geography of up to 3 countries at a time using the Setup Assistant. You can also import countries using the Manage Geographies task.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Geographies**	See the topics: *What Setup Assistant Completes for You* *Import Geography Reference Data*
2	Both Digital Sales and CX Sales	For the countries you imported, you can enable validation and lists of values for address elements such as states. When you enable validation on an address element, the application suggests alternatives during address entry. Enabling a list of values requires the user to make a selection from a list. Both validation and lists of values are enforced in the UIs.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Geographies**	See the topic: *Set Up Geography Validation*

Step	Applies To	Description	Functional Area and Task Name	Where to Get More Details
3	Both Digital Sales and CX Sales	The validation affects entries made in the application UI only. You must set the profile option Geography Address Validation Enabled to Yes to validate addresses you import.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Administrator Profile Values**	See the topic: *Set Up Geography Validation*
4	Both Digital Sales and CX Sales	Enable the mapping of account and contact addresses for each of the countries that you import. With mapping enabled, salespeople on the go can view their contacts on a map and obtain directions on their mobile phones with the click of a button. If you selected the geocoding option for a country in Setup Assistant, you can skip this step. Selecting geocoding for one country, enables it only for that country.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Geographies**	See the topic: *Enable Address Mapping*

Setup Assistant and Geography Data

Using Setup Assistant, you can import the geography data for up to three countries at a time. Here's an explanation of what geography setups Setup Assistant completes for you and which you must complete manually as described in this chapter.

What Setup Assistant Does for You

- 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 Must Complete Manually

- You must set up validation for address elements that you are 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 turn on geocoding in 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.

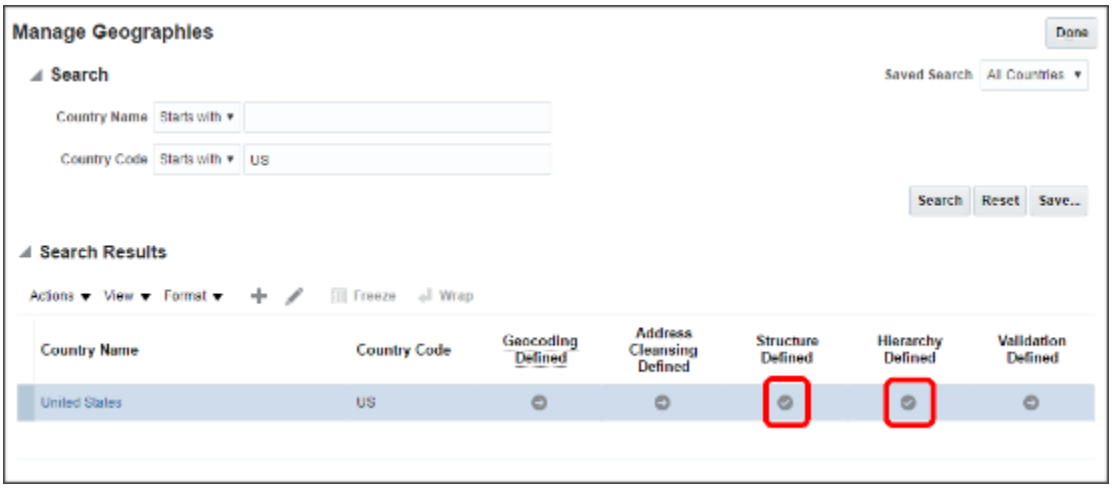
   > **Note:** The Import Geography Data action is disabled if the country isn't available from Loqate or if the country data is already imported.

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

List of Available Countries with Loqate Geography Reference Data

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

Country Name	Country Code
Andorra	AD
Angola	AO
Argentina	AR
Australia	AU
Austria	AT
Belgium	BE
Bolivia	BO
Bosnia and Herzegovina	BA
Brazil	BR
Bulgaria	BG
Canada	CA

Country Name	Country Code
Cayman Islands	KY
Chile	CL
China	CN
Croatia	HR
Cuba	CU
Cyprus	CY
Czech Republic	CZ
Denmark	DK
Dominican Republic	DO
Ecuador	EC
Estonia	EE
Finland	FI
France	FR
Germany	DE
Great Britain	GB
Greece	GR
Guadalupe	GP
Guam	GU
Guernsey	GG
Hungary	HU
Iceland	IS

Country Name	Country Code
India	IN
Indonesia	ID
Ireland	IE
Isles of Man	IM
Israel	IL
Italy	IT
Jamaica	JM
Japan	JP
Jordan	JO
Kenya	KE
Latvia	LV
Liechtenstein	LI
Lithuania	LT
Luxembourg	LU
Malaysia	MY
Malta	MT
Martinique	MQ
Mexico	MX
Netherlands	NL
New Zealand	NZ
Norway	NO

Country Name	Country Code
Oman	OM
Peru	PE
Poland	PL
Portugal	PT
Puerto Rico	PR
Qatar	QA
Reunion Island	RE
Romania	RO
Russia	RU
San Marino	SM
Singapore	SG
Slovakia	SK
Slovenia	SI
South Africa	ZA
South Korea	KR
Spain	ES
Sri Lanka	LK
Swaziland	SZ
Sweden	SE
Switzerland	CH
Taiwan	TW

Country Name	Country Code
Thailand	TH
Tunisia	TN
Turkey	TR
United Arab Emirates	AE
United States	US
Uruguay	UY
Vatican City	VA
Vietnam	VN

Set Up Geography Validation

Set up geography validation for those geography elements that you plan to use in your sales territories to prevent data entry errors. By default, application enforces the validation you specify for creating addresses in the UI only, so you must turn the validation on for import.

Set Up Validation

1. Open the **Manage Geographies** task from the Setup and Maintenance work area using the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Geographies
2. On the Manage Geographies page, search for each country you imported using either its name or its two letter ISO code. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking **Search**.
3. Select the country in the Search Results area.

4. Click **Go to Task** in the **Validation Defined** column.

   Here's a screenshot of the Manage Geographies page highlighting the Go to Task icon in the Validation Defined column.



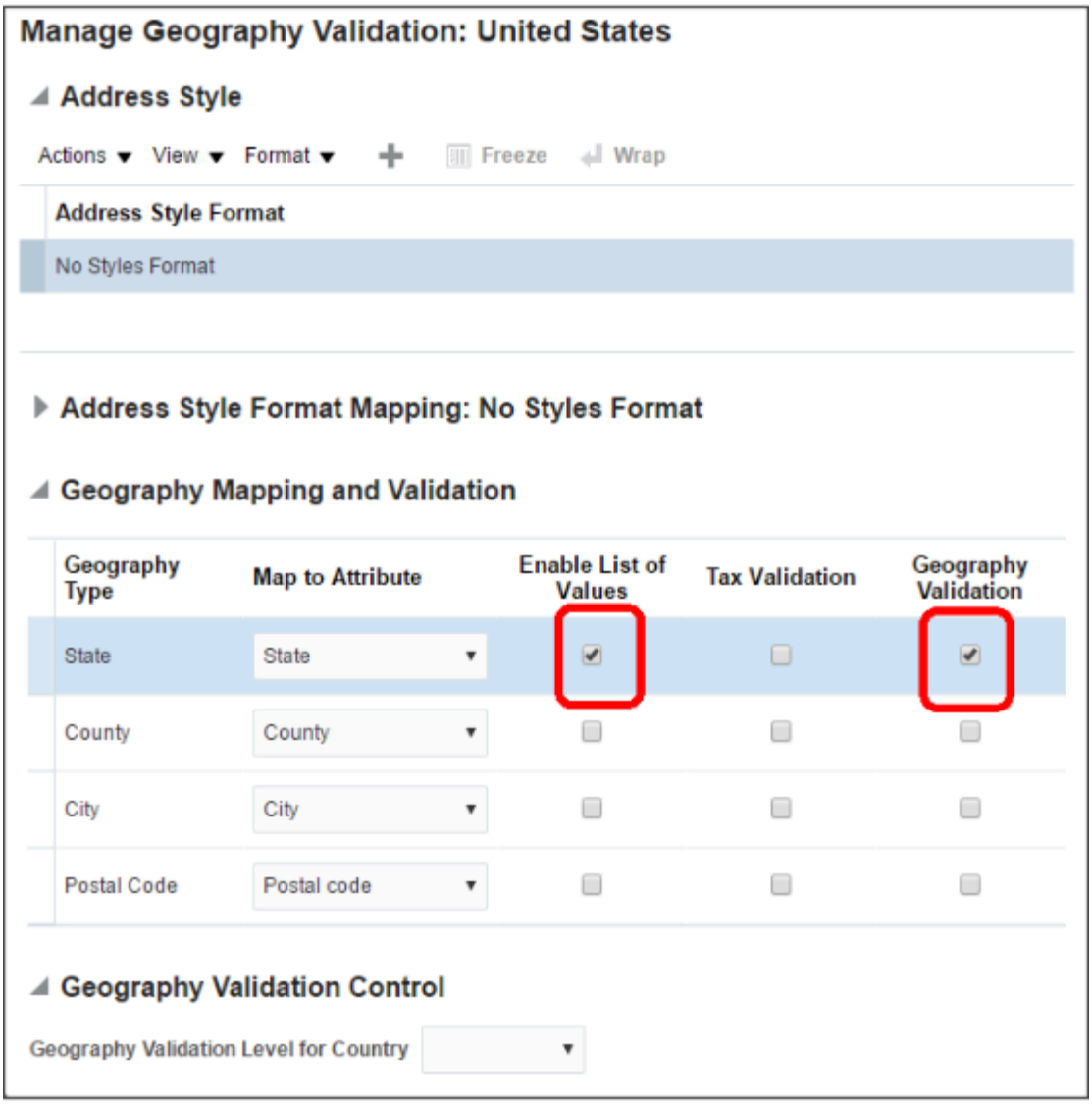
5. On the Manage Geography Validation page. Address Style section, ensure that the **No Styles Format** address style is selected. Defining validation for the No Styles Format address style ensures that the validations are performed for all addresses in the country.
6. Select **Enable List of Values** in the Geography Mapping and Validation section to display a list of values during address entry in the UI. For example, to have users select states from a list, select **Enable List of Values** for State.

   Vision Corp. enables the list of values for **State**. The company uses states for its sales territories and wants to ensure that state names are always entered correctly.

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

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

   Here's a screenshot of the Manage Geography Validation page highlighting the location of the Enable List of Values and Geography Validation options for the US State geography type.



Note: If you don't select the validation for an address element, the application still suggests values during address entry. It just doesn't validate the address element.

8. Specify if you want to allow users to save incomplete or invalid addresses by making a selection from the **Geography Validation Level for Country** list.
    - **No validation**: permits users to save incomplete or incorrect addresses.
    - **Error**: permits only valid addresses to be saved.

    Vision Corp. wants to save all addresses, including incomplete and invalid addresses, so it selects **No validation**.
9. Click **Save and Close**.
10. Click **Done** in the Manage Geographies page.

Turn On Validation for Address Import

You must set a system profile option Geography Address Validation Enabled to Yes for the validation to be enforced during import.

1. Open the **Manage Administrator Profile Values** task from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. On the Manage Administrator Profile Values page, search for the profile option by entering `Geography Address Validation Enabled` in the **Profile Display Name**.
3. Select **Yes** as the **Profile Value**.
4. Click **Save and Close**.

Enable Address Mapping

You can quite literally put your accounts and contacts on the map by enabling geocoding as described in this topic. Geocoding turns the addresses you enter or import into longitude and latitude coordinates so that the locations can be displayed on a map.

Enabling address mapping involves two steps:

1. You enable the generation of geographic coordinates for a country
2. You run a process that converts the addresses into geographic coordinates

Salespeople must enter valid postal addresses for geocoding to work, so it's a good idea for you to validate the addresses in your application by subscribing to Oracle Address Verification Cloud Service.

What You're Enabling

Salespeople benefit from geocoding in two ways:

- In the office, salespeople can view the location of an account address on the map while editing the account record.



- Using Oracle CX Sales Mobile on their smart phones, salespeople can view a map showing the locations of accounts and contacts within a certain radius of their current location, or any other location they choose.

They can obtain travel directions to any of the locations with the tap of a finger (CX Sales Mobile passes the coordinates to the native mapping application on the phone).



Turn on Geocoding on the Manage Geographies Page

To turn on geocoding for a country, all you need to do is select the **Geocoding Defined** icon for the country where you want to turn it on. Here are the steps:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Geographies

2. On the Manage Geographies page, search for a country you imported using either its name or its two letter ISO code. For example, you can search by entering either the country name United States or the two letter ISO code US, and clicking **Search**.
3. Click the **Geocoding Defined** icon.
4. Click **Done**

Run the Populate Location Latitude and Longitude Process

Run the process that converts the addresses to the location latitude and longitude regularly and each time you import. Addresses that salespeople enter or addresses that you import don't show up on the map until the process completes, so schedule the process to run as frequently as necessary. If you imported geography data using Setup Assistant and turned on geocoding for any country, the process is already scheduled to run for you. Here's how to run the process:

1. In the Navigator, click **Scheduled Processes** under the **Tools** heading.
2. Click **Schedule New Process**.
3. Click the **Name** drop-down list icon and the **Search** link at the bottom of the list.
4. In the Search and Select: Name window, search for "Populate Location Latitude and Longitude Information".
5. Select the process name in the search results and click **OK**.
6. In the Schedule new Process dialog box, click **OK** to confirm your selection.
7. In the Process Details window, click **Advanced** to view the advanced options.
8. You can make the following entries on the Parameters Tab:

Parameter	What to Enter
Country Code	Leave this field blank if you want to generate the coordinates for all the countries you enabled for geocoding, or enter a specific country code.
Start Date, End Date, and Regenerate Geocode	Leave these fields blank. The geocoding process picks up any addresses that have not been geocoded previously.
Batch Size	Leave this field blank unless you're geocoding more than 50,000 addresses at a time. If you're processing a large number of addresses, then enter 1000. By default, the application launches a subprocess for each batch of 500 addresses. There's a maximum of 10 subprocesses, so, if you're processing more than 50,000 addresses, then you must run the process multiple times. You can increase the batch size up to a maximum of 1,000.

9. Schedule the process to run regularly:
    a. Click the **Schedule** tab.
    b. Select **Using a Schedule** and specify the frequency.
10. Click **Submit**.

    The application confirms your process was submitted.
11. You can monitor the process completion on the Overview page.

    The process spawns multiple processes, depending on the batch size and the number of addresses you need to process.

8 Search

Overview of Optional Setup for Adaptive Search

Setup Assistant enables the Adaptive Search configuration provided by Oracle for the objects that you selected. In this chapter, you learn about optional setups for Digital Sales and CX Sales UIs: how to make additional keywords available for search in both UIs, for example. And you learn how to restrict the number of objects searchable by Global Search, which is available in CX Sales only.

For additional advanced configuration and for information on how to configure search in individual work areas, see the Adaptive Search and Workspace chapter in the Implementation Reference guide.

Here's a list of optional tasks that you can use to configure the way search works in your application:

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Digital Sales and CX Sales	By default, Adaptive Search is configured for keyword search on all the important fields. However, you can make additional fields searchable both in Digital Sales UIs and in CX Sales UIs, including global search and Workspace.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **All Tasks** > **Configure Adaptive Search** > **Setup** > **Advanced**	See the topic: *Make Additional Fields Searchable*
2	Digital Sales	Configure the list of values that use Adaptive Search, called Smart Pickers.	Configuration done in Application Composer and in VB Studio.	See "Configure the Adaptive Picker" in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative. .
3	Digital Sales and CX Sales	Configure what shows up in list of prioritized recent items, called Smart Lists. For example, you can specify how long to keep the items in smart lists if they aren't acted on and how frequently the lists are refreshed.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Administrator Profile Values**	See the topics: • *My Lists* • *Modify My List Behavior*
4	CX Sales	For Global Search, a feature available only in CX Sales, you can restrict the number of the objects that can be searched.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **All Tasks** > **Configure Adaptive**	See the topic: *Configure Global Search Scope and Display of Search Results*

Step	Applies To	Description	Navigation	Where to Get More Details
		By default, all of the objects you enabled in Adaptive Search are automatically searchable from the Global Search box at the top of the page. If you enabled the Partner object, for example, a salesperson searching for the name "Pinnacle", gets both the accounts and partners named Pinnacle.	**Search** > **Configure Global Search**	
5	CX Sales	Optionally, you can configure the way the global search UI appears to salespeople by creating your own configuration for CX Sales. For example, you can change which suggestions display when you click in the search box and which objects get displayed in search results by default.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **All Tasks** > **Manage Global Search Configurations**	See the topics: • *Global Search UI* • *Configure Global Search UIs*

Related Topics

Adaptive Search and Workspace

Oracle is completing the process of replacing the CRM search technology with Adaptive Search, a high-performance search engine that provides keyword searching and enhanced filtering capabilities. Digital Sales UIs and features rely exclusively on Adaptive Search. In CX Sales, some work areas still rely on legacy CRM Search technology.

By default, all customers now have Adaptive Search enabled automatically for Accounts and Contacts. You can enable other objects using Setup Assistant or manually. Not all the available objects are sales objects. For example, Partner and Partner Contact are only pertinent for Partner Relationship Management. HR Help Desk Request, Installed Base Asset, Internal Service Request, and Service Request are specific to Fusion Service. Adaptive Search is also available on custom objects or child objects you create.

Here's where you can use Adaptive Search:

- All Digital Sales UIs
- Workspace in CX Sales

  A work area where salespeople can work on all of the available business objects at the same time.
- Work areas for individual business objects in CX Sales.
- Global Search in CX Sales

  This is the keyword search available at the top of the page in CX Sales.

- REST APIs

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

Setup Assistant and Search

Setup Assistant sets up everything your sales organization needs to start using Adaptive Search both in Digital Sales and in CX Sales.

What Setup Assistant Does for You

- Enables the objects you selected for Adaptive Search and runs the indexing process at the recommended intervals. The Setup Assistant enables the search configuration provided by Oracle. Adaptive Search is the search technology that powers all Digital Sales UI searches, including smart pickers. It's also the search technology for most search UIs in CX Sales, including Workspace, individual work areas, Workspace infolets, Global Search, and REST APIs.
- Displays the global search field at the top of the page for CX Sales UIs. (Behind the scenes, it sets the profile option Global Search Enabled to Yes.)
- Sets up the search for work areas that still use the legacy CRM-specific search technology:
  - Enables the work area searches in the work areas that don't yet use Adaptive Search.
  - Runs the Synchronize CRM Search Indexes process every 5 minutes. This process sets up the search index for work area searches.
  - Runs the Optimize CRM Search Indexes process weekly. This process keeps the work-area search index from getting fragmented.

    Note: If your implementation requires indexing processes to run at different intervals, you must schedule the processes separately using individual tasks available from the Scheduled Processes page (**Navigator** > **Tools** > **Scheduled Processes)**. For details, see the topic Schedule Work Area Search Processes topic in the Implementation Reference guide.

What You Can Set Up Manually

- Modify the way global search works.
- Configure the way keyword searches work.
- Add or remove objects available in Adaptive Search.
- Create saved searches for the sales organization.
- Create any saved searches for the work areas that don't yet support Adaptive Search and modify search behavior. See the Implementation Reference guide (*Overview of Work Area Search Setup*) and the Configuring Applications Using Application Composer guide for details.

  Note: You must create separate saved searches for these legacy individual work areas.

Related Topics

- Create Saved Searches
- Modify Work Area Search Behavior

Search in Digital Sales and CX Sales UIs

There are multiple ways to search in Digital Sales and CX Sales.

List Pages in Digital Sales

Here's a brief overview of how salespeople search in the list pages in Digital Sales work areas.

1. They place the cursor in the search field and select a saved search as the starting point.

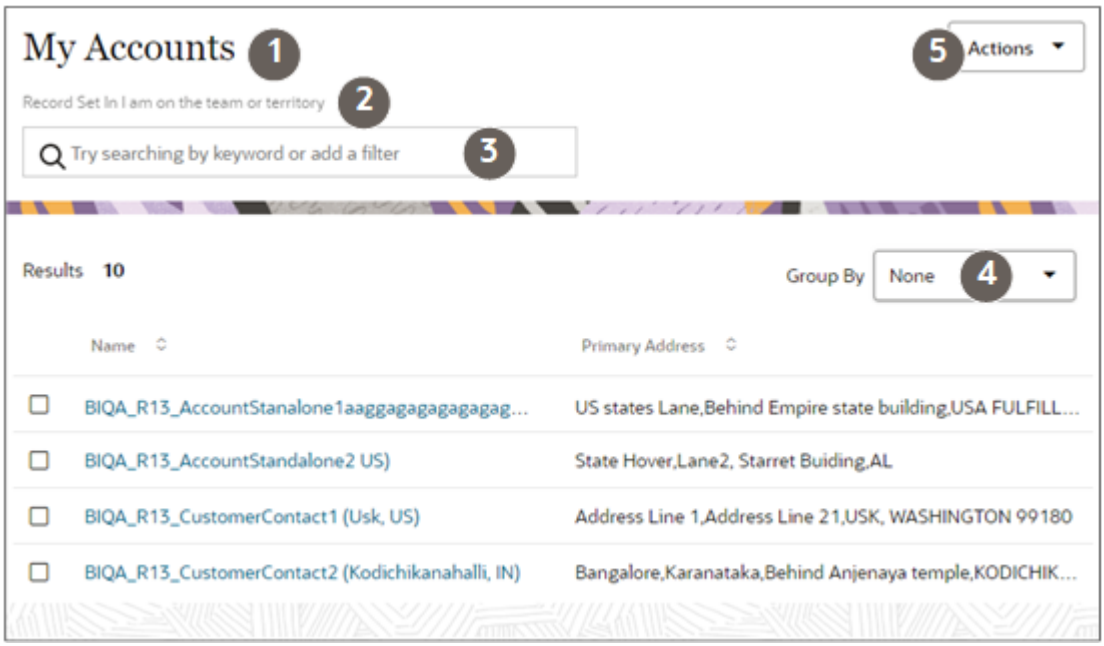
   The selected saved search determines the breadth of the search. For example, the My Accounts saved search restricts the search to accounts where the salesperson is in the team or territory. The filters are displayed right above the search field.
2. In the search field, they can enter filters and keywords:
   - Add filters to filter results by a specific field. For example, to filter out all the accounts in Boston:
     i. Enter `city`.
     ii. Select **Primary Address: City** to specify the address type.
     iii. Select **Equals** as the operator.
     iv. Enter the city name: `Boston`.

     For more search options see the Using Digital Sales guide topics *Filter a List* and *Filter by Numbers and Dates*
   - Enter one or more keywords to search on and press return. Keywords can be words in the name or in related fields and objects. See the topic: *Search Using Keywords*.
3. Further configure the search results:
   - You can group your results by selecting the attribute you want to group by.
   - Change the columns displayed in the search results by clicking **Actions** (the three dots) and selecting **Manage Columns**.
   - Change the order of the columns by selecting and dragging.
   - Change the default sort order using the controls at the top of each column.
4. Click **Save** to save your search criteria and search result formats to create a saved search.

Digital Sales List Page Features

Callout Number	Description
1	Name of the saved search that's generating the list on the list page.
2	List of filters in the search.

Callout Number	Description
3	Search bar where you select saved searches, and enter filters and search terms
4	Group search results
5	Take actions: • Save to create a new saved search • Export the list • Manage columns in list results • Sort to display most relevant records first

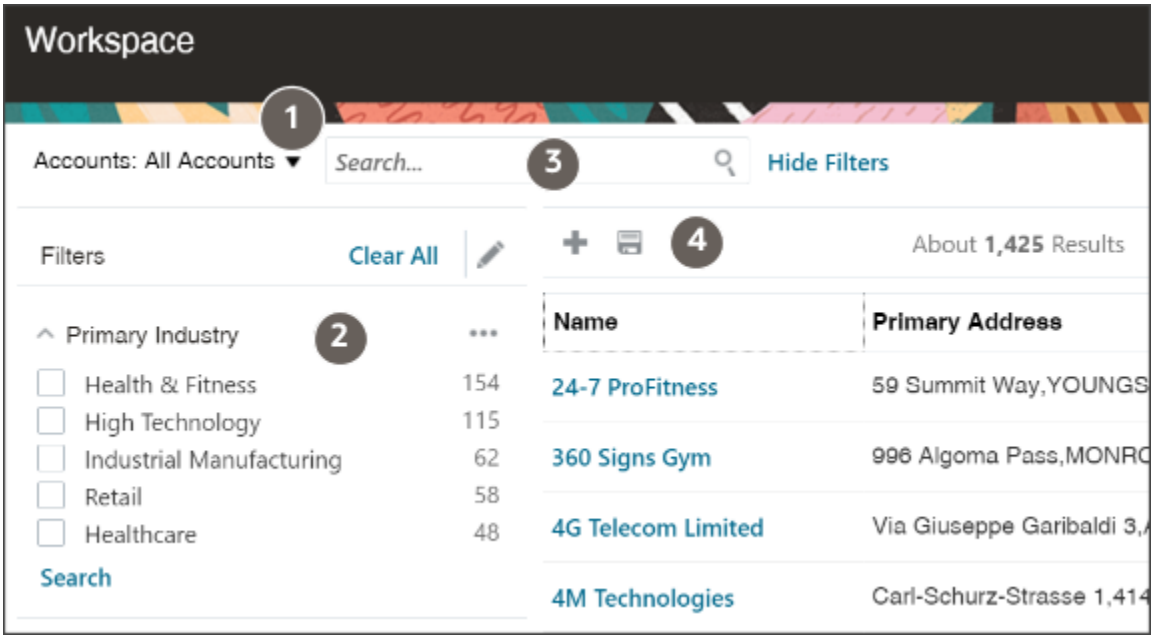


Search in Workspace and Work Areas in CX Sales

For searches focused on one sales object and to explore sales data, you can use Workspace and the different work areas.

Here's an annotated screenshot of Workspace to explain how it works. (The search experience in the work areas targeted to single objects is exactly the same. You just can't switch objects.) :

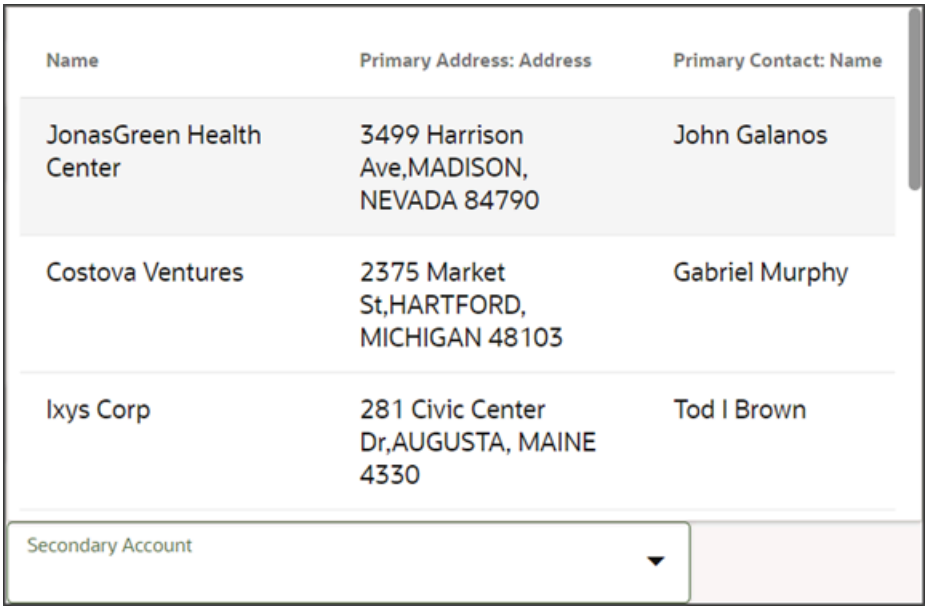
1. You select a particular saved search as your staring point (callout 1 in the screenshot).
2. Adding filters (callout 2) lets you explore the list along a particular dimension. When you add industry as a filter to a list of accounts, for example, you can see which industries have the most accounts and how many there are.
3. If you are looking for a specific record in the list, you can search by keyword (callout 3).
4. You can save your personalized search as a new search (callout 4).



Smart Pickers in Digital Sales

In Digital Sales, a smart picker is a special kind of search on a list of values. Smart pickers leverage your Adaptive Search setup so that users can quickly and easily find the record they're looking for. Adaptive Search makes it possible to search using attributes of related objects and you can create saved searches to narrow down the search to the items you want. For example, a salesperson searching for an account can search on the name of the contact, or the city where the account is located. Smart pickers also provide "type ahead keyword search", which means that search results appear as the user starts typing.

Here's an example of a smart picker:



Global Search in CX Sales

In CX Sales, you can use the global search, located at the top of the application pages, to search by keyword across the different types of sales information. For example, searching using the keyword "Paris," finds all the contacts named Paris, as well as all the accounts, opportunities, leads, and other records Paris is associated with. You also get all of the records with Paris addresses. Global search makes it possible to search all records you have permission to view.

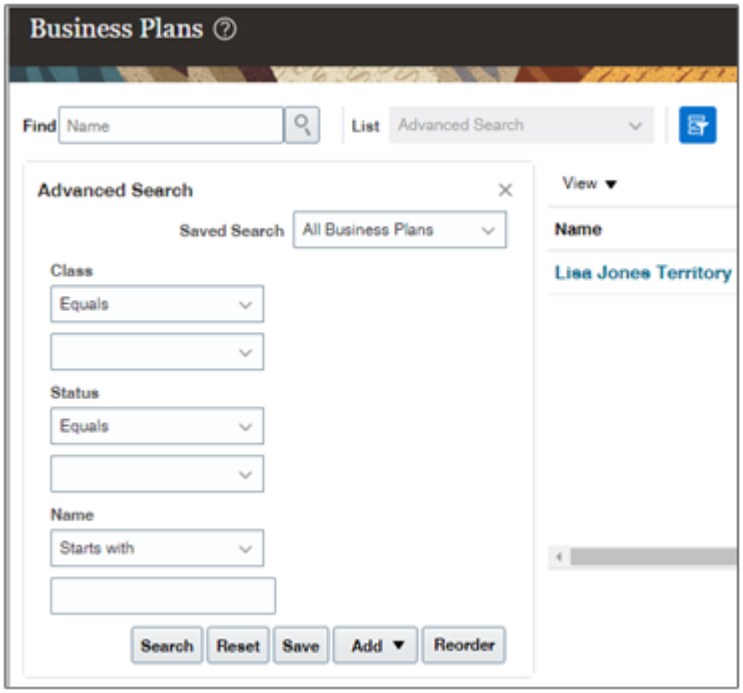


Global search uses the same Adaptive Search technology as Digital Sales, Workspace and work areas, but it supports keyword searches only.

Search in Work Areas That Still Use CRM Search

For Products, Business Plans, Service Requests, and Competitors work areas, salespeople can search either by record name or switch to an advanced search mode to search using multiple search criteria. The saved searches (lists) for the different work areas use a different technology from those you create for Adaptive Search, so you must set them up separately.

To highlight the differences in UI features, here's a screenshot of the Advanced Search panel in the Business Plans work area landing page, a work area with the legacy CRM search.



Search Type Differences

Here are the key differences between the two search types.

Search Technology Differences Overview

Search Properties	Adaptive Search	CRM Search
Where It's Used	All Digital Sales searches: including list pages, "smart pickers", and saved searches. In CX Sales: Workspace, work areas powered by Adaptive Search, Infolets powered by Adaptive Search, and saved searches for these. Adaptive Search is also used in REST APIs. Global Search uses only Adaptive Search keyword searches.	Legacy work areas including Product, Business Plans, Service Requests, and Competitors. Note that you set up Saved Searches for legacy work areas separately because they use CRM Search.
Search Scope	In list pages, you select a saved search to set the scope of your search You can search using related information. For example, you can search for an account by contact name, address city, and owner.	In list pages, you select a saved search to set the scope of your search and search by name. You can use advanced search to search using multiple search criteria.
Indexing Frequency Until a new record is indexed, it's not available for search.	Records you create and update in the UI are automatically indexed and made searchable within seconds. Imported records or records updated by background processes aren't available for search until the process completes.	Both records that you create in the UI and those you import are available almost immediately. The indexing process usually runs every 5 minutes.
List of Recent Items Records you recently created, edited, or accessed, includes records that haven't been indexed yet.	You get a list of up to 10 most recent items for each object. In addition, selecting a Smart List, displays up to 50 items you recently accessed ranked by the number of times you accessed them.	Displays recent items when you place your cursor in the Search field.
Wildcards and Operators	Use an asterisk (*) at the end or middle of a word to indicate missing letters and the question mark (?) to indicate a single missing letter. You can also use operators OR and NOT, and quotation marks (") for exact phrases. Adaptive Search also includes multiple numeric and text operators that you can use for advanced search. For example, you can search on a range of values, on all the words, and words in a specific order. You can also find records with no values.	Use a percent sign (%) at the beginning, end, or middle of a word to indicate missing letters.

Search Properties	Adaptive Search	CRM Search
Filters	Extensive ability to use filters to explore your data. For example, you see the most frequent values in a filter and how many records appear in each. For example, adding the primary industry as a filter when searching accounts, automatically displays the most frequent industries and the number of records for each. A search of opportunities using win probability as a filter, displays different ranges of win probabilities and the number of records in each range.	You can filter your results by adding new search terms and rerunning yours search.
Saved Searches	You can create personal saved searches and sales administrators can also create saved searches for different roles in the organization. Adaptive Search saved searches can be used in any feature powered by Adaptive Search. You can reuse Digital Sales saved searches in Workspace, in infolets powered by Adaptive Search and in CX Sales Mobile.	You can create personal saved searches and sales administrators can create saved searches for different roles. Because the saved searches are built on a different technology from Adaptive Search, you can't use them in UIs that use Adaptive Search, including Workspace and Digital Sales list pages.

How Salespeople Search and What You Can Configure

Here's how salespeople search with Adaptive Search and how you can modify the default behavior provided by Oracle.

How Salespeople Search in the UI	What Administrators Can Configure
Selecting a saved search displays a list that matches the saved search criteria and determines the scope of any search you perform on the page. For example, if you select All Accounts, you're searching all accounts you can view. If you select My Accounts, then you're searching only the accounts that you own.	You can create your own saved searches targeted to specific roles within the sales organization. And you can determine which saved search appears by default when salespeople open the UI. Salespeople can create their own personal saved searches and override the administrator defaults.
You can enter one or more search terms in the **Search** field. You can use related information for your searches. For an account, you can search by company name, the city where the account is located, or the primary contact at the company, for example. You can even search for an account by the name of the salesperson on the sales team. The search results match whole terms, but you can use the (*) wildcard for partial	You can enable or disable the attributes available for search. Oracle enables the most common attributes for you, but you must enable the search for any child objects and fields you create in Application Composer.

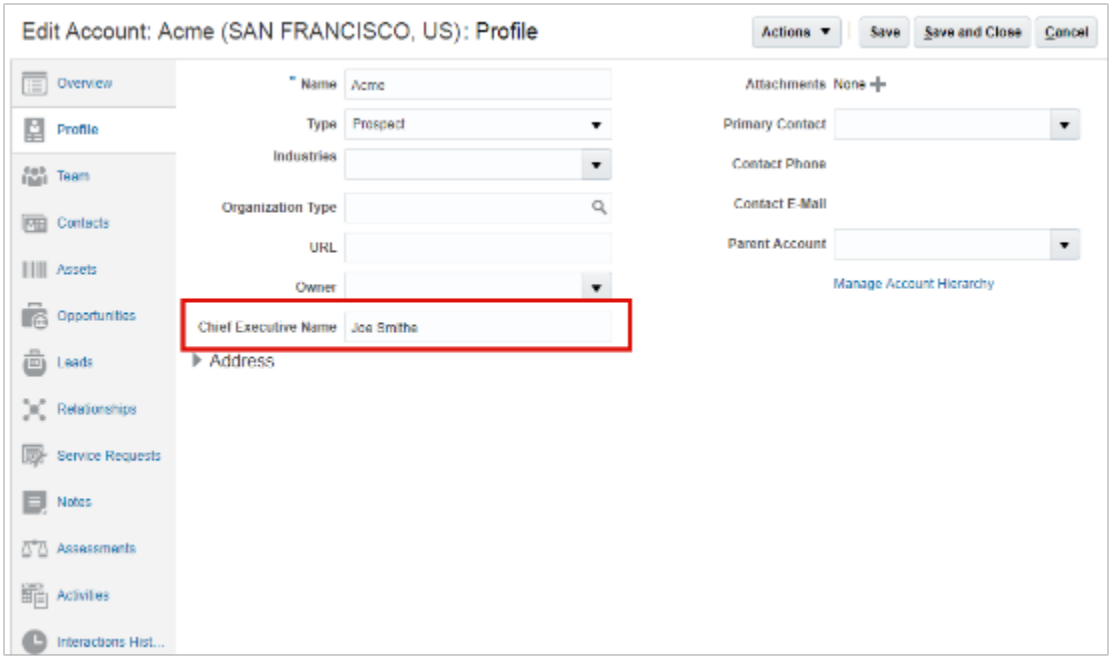
How Salespeople Search in the UI	What Administrators Can Configure
words and use operators, including NOT, OR, and Between for date ranges.	
You can view the filters used in the saved search by clicking the **Show Filters** link. You can also add filters of your own.	You can specify which additional fields users can add as filters and you can set up groupings of values the filters show. For example, you can break down opportunities by revenue ranges: 0 to 10,000, 10, 000 to 100,000, 100,000 to 500,000, and 500,000 and up.
Filters show the most common values and the number of records in each. For example, a search of accounts with the primary industry as a filter, automatically displays the most frequent industries and the number of records for each. A search of opportunities using win probability as a filter, displays different ranges of win probabilities and the number of records in each range. Your filter selections are additive, if you select Health Care as the primary industry and then Lisa Jones as the owner, Workspace displays only those Health Care accounts Lisa owns.	You can configure value ranges for numeric, corporate currency, percent, and date filters. For example, you can configure value ranges for the opportunity win probability filter and other similar filters.
Salespeople can save any search criteria they enter as their own personal saved search.	You can create saved searches for use by the whole sales organization and you can tailor them to different roles. You can expose the saved searches as filters in Workspace infolets to display key sales information right on the home page.
Sales administrators and sales managers can download search results into an Excel spreadsheet.	You can remove the Export List button from the page using Application Composer. You can also enable other custom sales roles to use the button, by granting the privilege ZCA_WORKSPACE_EXPORT.

Make Additional Fields Searchable

By default, Workspace, Global Search, and the work areas that use Adaptive Search, include all of the key fields you need for search. (See the topic *Adaptive Search Configuration Provided by Oracle* for a list.)

However, you can enable additional fields for search, including custom ones. And you can remove existing fields from use. This example shows you how to enable the Chief Executive Name field. The field is a standard application text field, but the same procedure applies to any field, even a custom field on a standard application object. When you're done with this configuration and publish it, a salesperson can search on the CEO's name to find the account where the person is the CEO. The search also returns all of the opportunities for that account when you enable opportunities to be searched by account fields.

Suppose that you added the CEO name field to the Account UI and want to make entries in this field searchable. Here's a screenshot of the Edit Account page highlighting the location of the field.



Making the field searchable involves these steps:

1. Make the field searchable for its business object.
2. Optionally, you can enable the field for search of a related object.
3. You publish your configuration.
4. Enable the field for display in UIs as a column and a filter.

Note: If you want the field to be displayed in the UI, either as a filter or as a column in search results, then you must enable it for display on the Configure Workspace UI tab of the Configure Adaptive Search page.

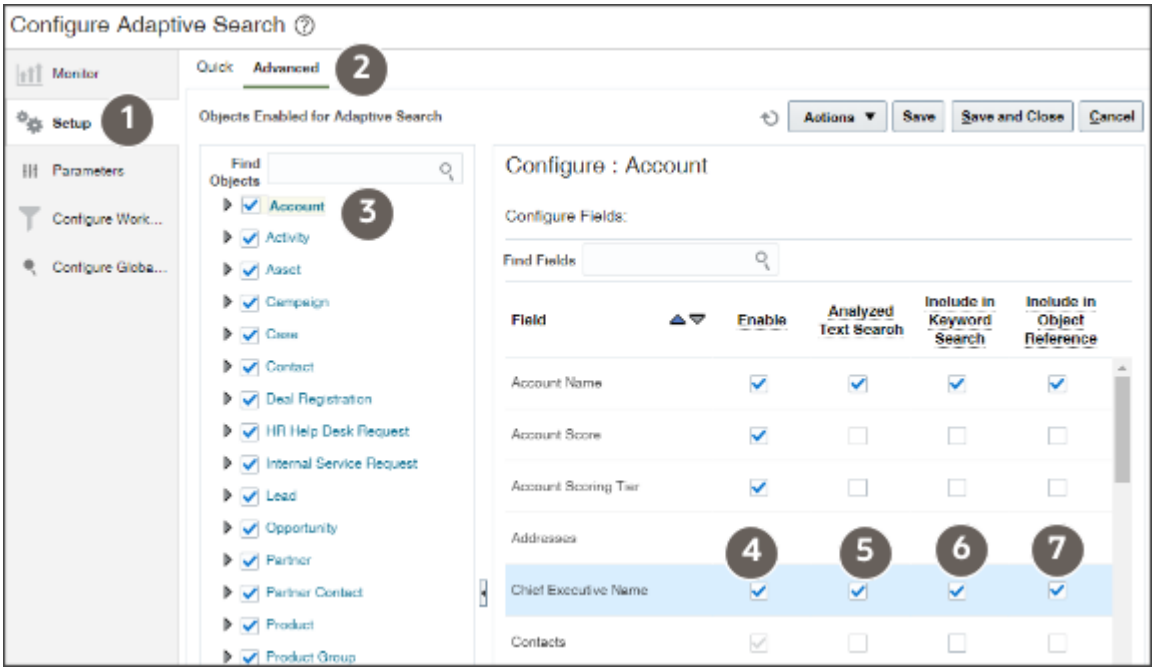
Make the Field Searchable in Its Business Object

Here's how you make the field available for searching its business object. For example, making the account searchable by the CEO name.

1. Navigate to the Setup and Maintenance work area, and use the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, Setup tab (callout 1 in the screenshot), click **Advanced** (callout 2).

3. In the left pane, click the name link for the object where the custom field appears (callout 3). The CEO name field is an account field, so you click **Account**.

   The field is listed in the Configure Fields section.



4. Select the **Enable** option to index the field for Workspace and Global Search (callout 4).
5. For a text field, including Chief Executive Officer, select the **Analyzed Text Search** option to index individual words in the field. Your selection also enables fuzzy search (search that retrieves results with similar spellings). And you enable other search operators, including **All of the words** and **Any of the words**.
6. Select the **Include in Keyword Search** option to enable the field for searches in the Digital Sales list pages and in CX Sales Workspace and Global Search.

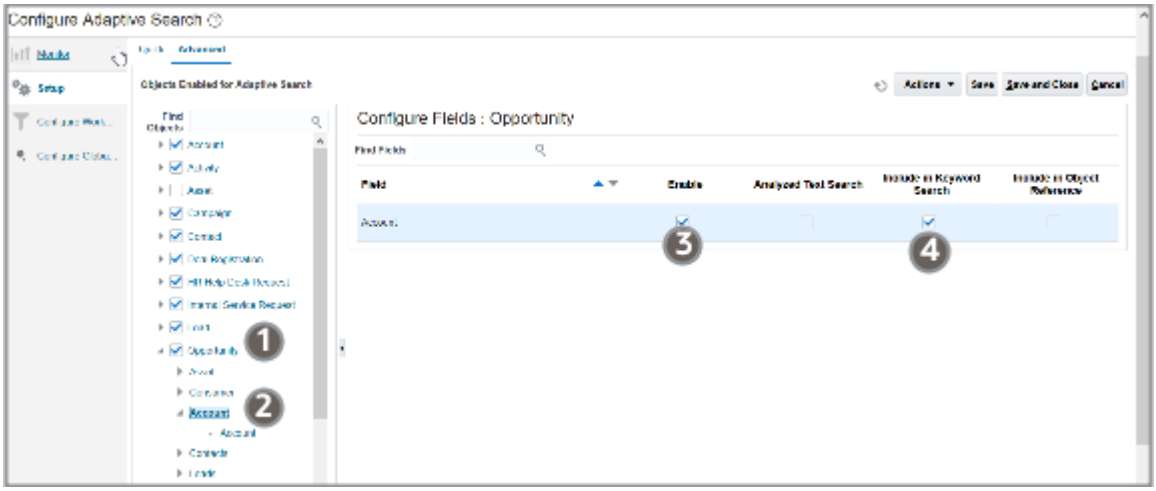
   If you leave this check box deselected, users can't search for accounts using the CEO name. But in Workspace, they can still add the Chief Executive Name field as a filter for accounts and search the field there. Global Search doesn't permit you to add filters, only to search by keyword.
7. Select the **Include in Object Reference** option to enable the field for search in related objects. Make the selection if you want to use the CEO name when searching for opportunities, for example.

   If you didn't select the **Include in Keyword Search** option, but select **Include in Object Reference**, then users searching opportunities can use the field only as a filter in Workspace.

Make the Field Available for Searching a Related Object

You can only make the field available for search in a related business object if you selected the **Include in Object Reference** option for the field.

1. In the left pane of the window, open the object where you want to enable the search. For this example, Opportunity (callout 1 in the screenshot).



2. Select the field in the left pane, in this example, Account (Callout 2).
3. In the right pane, select **Enable** (callout 3).
4. If you want to use the field for searches in Global Search and in the Workspace Search box, you must select the **Include in Keyword Search** option (callout 4).

   If you don't select this option, but selected Enable, then the field remains available as a filter in Workspace, but can't be searched in Global Search.

   The Include in Object Reference option isn't relevant here. Here's a summary of the two use cases:

Use Case	Enable	Include in Keyword Search
Users can search on the field using Global Search and in the Workspace Search box. For example, entering the CEO name, they get results containing, not only the account where the person is a CEO, but the opportunities for that account as well. In Workspace, they can also select the fields as a filter when searching for the object. For example, when searching for opportunities in Workspace, they can filter by CEO name.	Selected	Selected
Users can add the field as a filter in Workspace, but can't search on it using the Search box or using Global Search.	Selected	Deselected

Publish Your Configuration

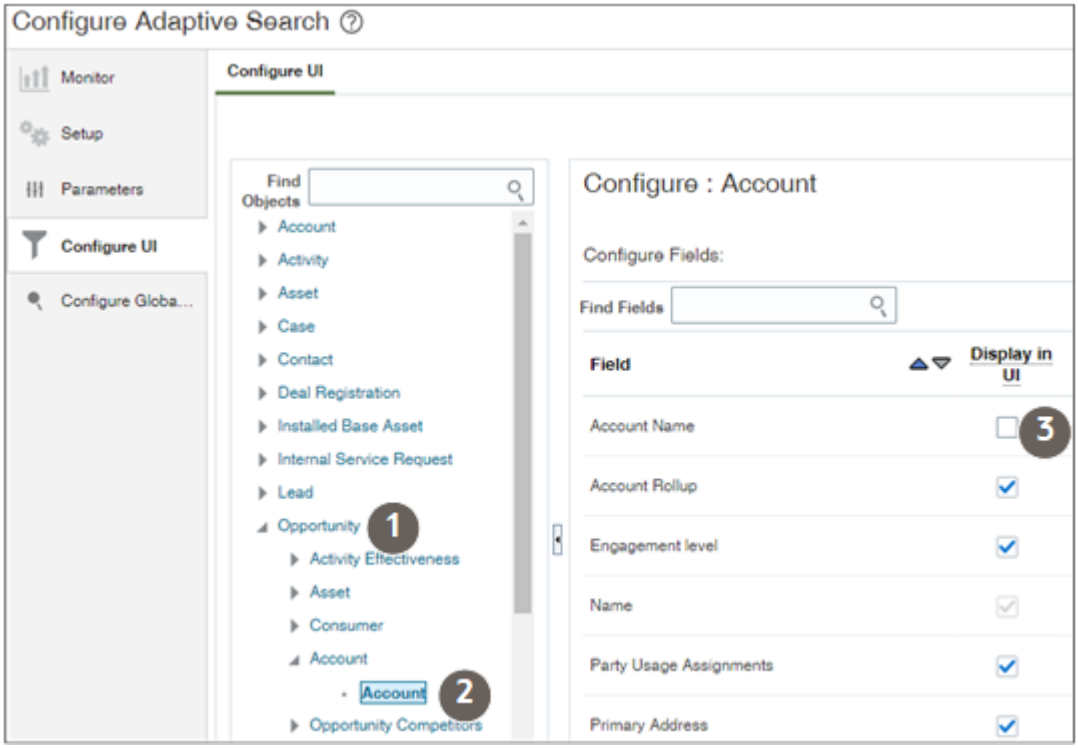
After making your option selections, click **Action** > **Publish**.

Publishing triggers an indexing process that you can monitor on the Monitor tab, Publish subtab. Your new configuration becomes available after the indexing process completes. If the process completes with errors for some reason, contact your help desk.

Enable the Field for Use as a Filter in Digital Sales List Pages and CX Sales UIs

You must enable the field for display on the UI, so it can be used as a filter and added as a column in search results.

1. In the Configure Adaptive Search page, click **Configure UI**.
2. To enable the field for use as a filter on its object (for example, to enable the account field to be used as a filter when searching accounts), do the following:
    a. Select the object in the left pane of the Configure UI tab.
    b. Select the **Display in UI** option for the field.
3. To enable the field for use in the UI of other related objects (for example, to enable the account field as a filter in opportunity searches), do the following:
    a. Display the related object hierarchy for the object where you want to enable the filter in the left pane of the Configure UI tab. For example, select Opportunity (callout 1 in the following screenshot).
    b. Locate and select the field's object in the object hierarchy. For example, select Account (callout 2).
    c. Select **Display in UI** option for the field (callout 3).



4. Click **Save and Close**.

Related Topics

- Adaptive Search Configuration Provided by Oracle

Lists of Prioritized Recent Items

My Lists

My Lists, also known as "smart lists", show users the records that are most relevant to them, based 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 *Modify My List Behavior* 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 task due tomorrow, upcoming appointment, and so on
- Related objects: Relevancy scores are boosted for related account, opportunity, or lead objects associated with overdue tasks and appointments
- Event-based updates: Updates to win probability, status, and sales stage 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

Modify My List Behavior

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

- Change how long untouched items are kept in the list, 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 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: **Offering: Sales** > **Functional Area: Sales Foundation** > **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.

Enable the Near Real-Time User Contextual Relevancy Profile Option

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: **Offering: Sales** > **Functional Area: Sales Foundation** > **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.

See *Age User Context Relevancy Feed* for more information.

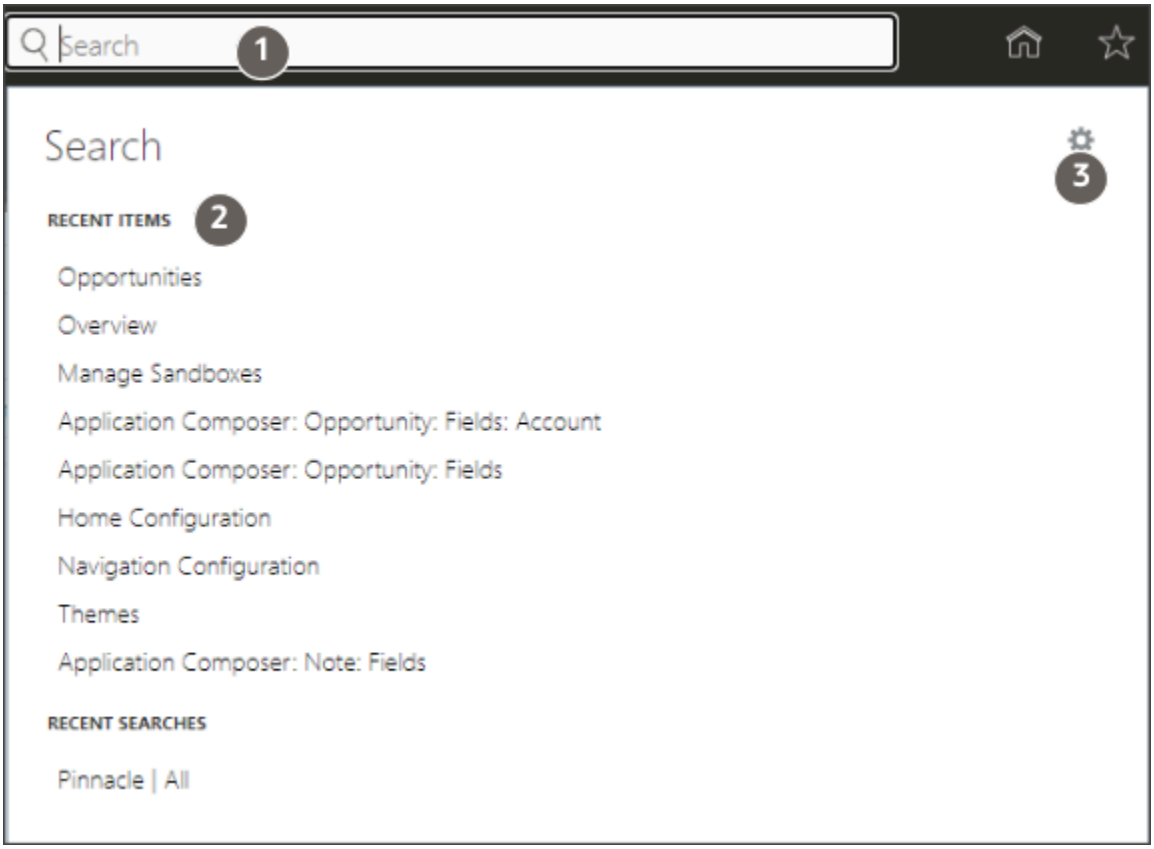
CX Sales Search Setups

Global Search

Global Search UI

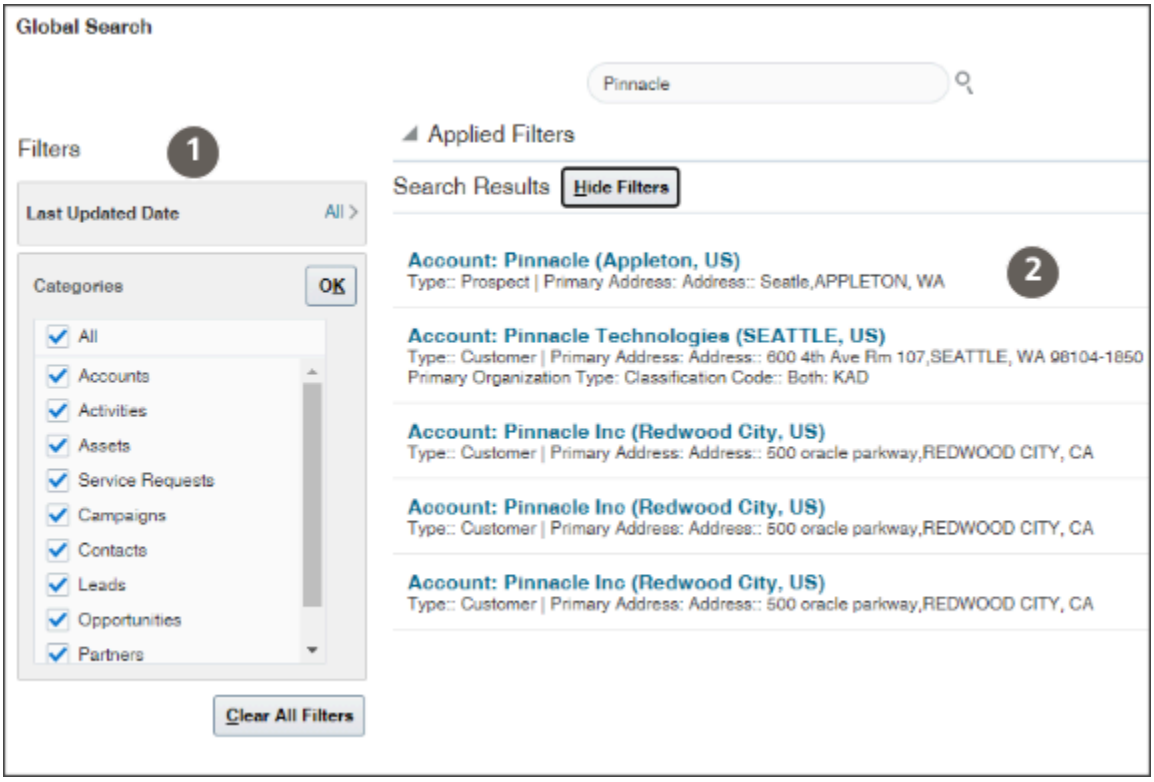
Global Search is the search box at the top of the page in the CX Sales UIs. This feature isn't available in Digital Sales. Here's a summary how global search works and how you can configure it.

How It Works	What You Can Change
When salespeople click in the global search box (callout 1), the application suggests recent search terms, recent pages you visited, and other recent items. The items are organized in suggestions groups (callout 2). For example, under Recent Items, the application suggests recent pages you visited.	• Change the "Search" prompt in the global search box. • Specify which suggestion groups get displayed for users by default. For example, you may want to hide Recent Items and show Recent Searches first.
Salespeople can specify which suggestion categories they want to see and which categories of results are available in the search results, by clicking **Personalize** (callout 3), the application suggests recent items they worked on recently.	• Specify which suggestion groups are available for use. For example, instead of hiding Recent Items by default, you may want to remove it from use entirely so users can no longer display the category.
Salespeople enter keywords in the search box (callout 1) and press **Return** to search across different objects.	• You can specify which objects are available for global search and how the results are displayed. See the topic Configure Global Search Scope and Display of Search Results



Here's how the results get displayed after you enter your search term and press **Enter**.

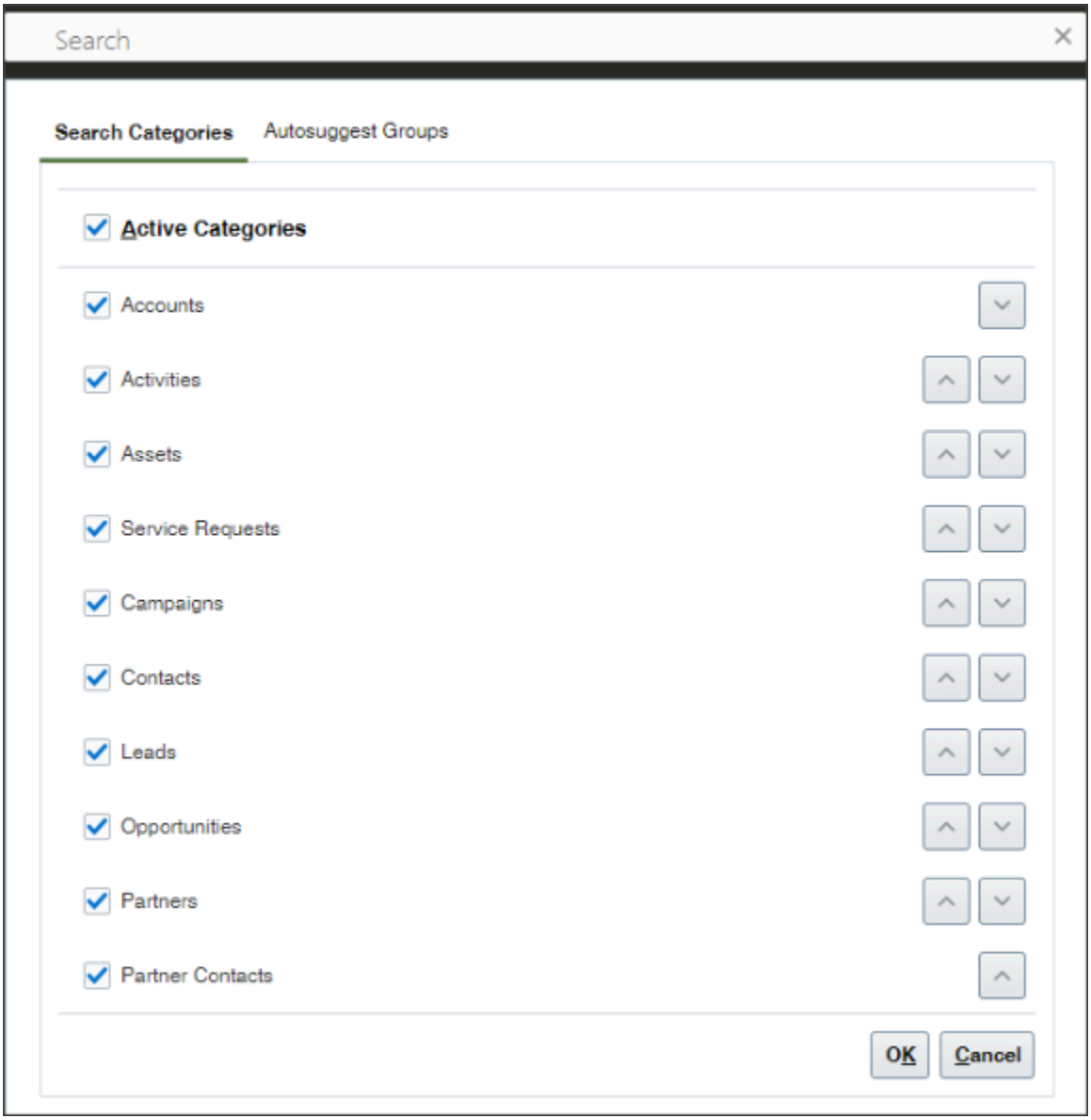
How It Works	What You Can Change
The results of the search show the objects that are enabled for global search during setup.	• You specify which objects are available for global search and how the results are displayed. See the topic Configure Global Search Scope and Display of Search Results
Salespeople click **Show Filters**, and select those objects they want to see in their search results (callout 1).	• The objects you selected for use in global search, show up as the available filters here. • You can specify which objects are selected by default.
Clicking on the first line of each search result opens the record for editing.	• By default, users drill down on the record name, but you can specify a different field as the title. • You can also specify which fields display in the two lines below the title in each search result.



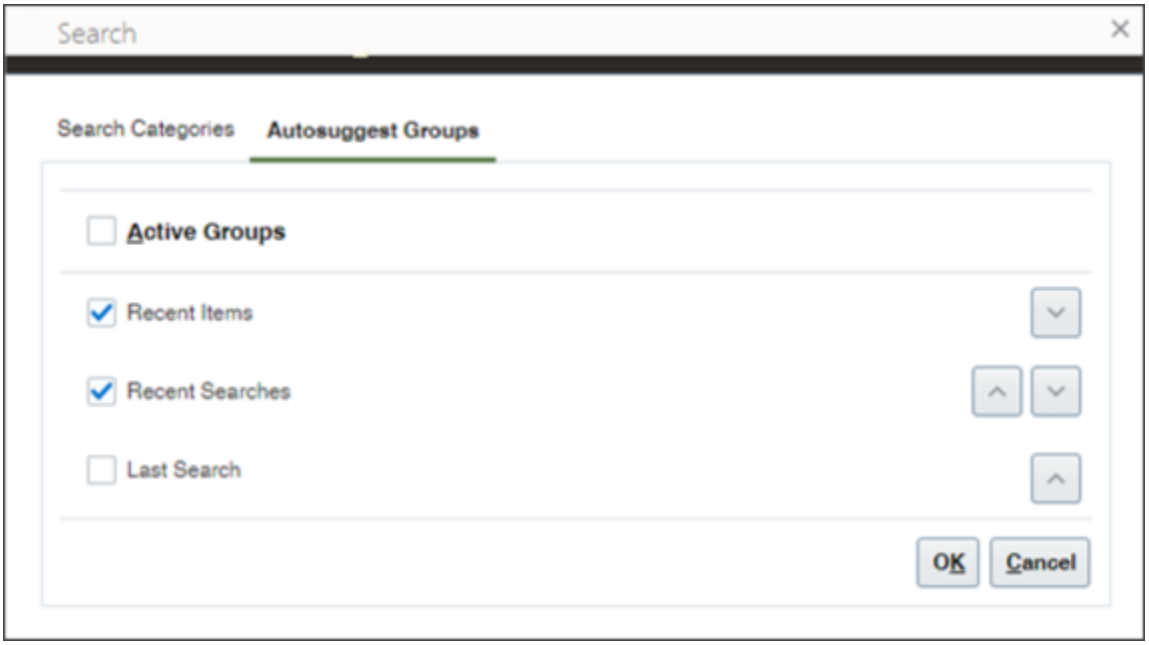
Salespeople can personalize their global searches by clicking **Personalize**. See the topic Configure Global Search and Result UIs to learn how to make changes in the default behavior.

How It Works	What You Can Change
Salespeople can specify which objects are included in search results and in which order.	• You can specify which objects are available for selection and which are enabled by default. • You can disable personalization of search categories.
Salespeople can specify which autosuggest groups show up and in which order when they click in the global search box.	• You can specify which autosuggest groups are available for display and which are enabled by default. • You can disable personalization of autosuggest groups.

Here's the Search Categories tab salespeople can use to select which objects (categories) are included in search results. Changing the order of results isn't supported.



Salespeople can control which Autosuggest Groups tab makes it possible to control the suggestions you get when you first click in the global search.



Related Topics

- Configure Global Search UIs

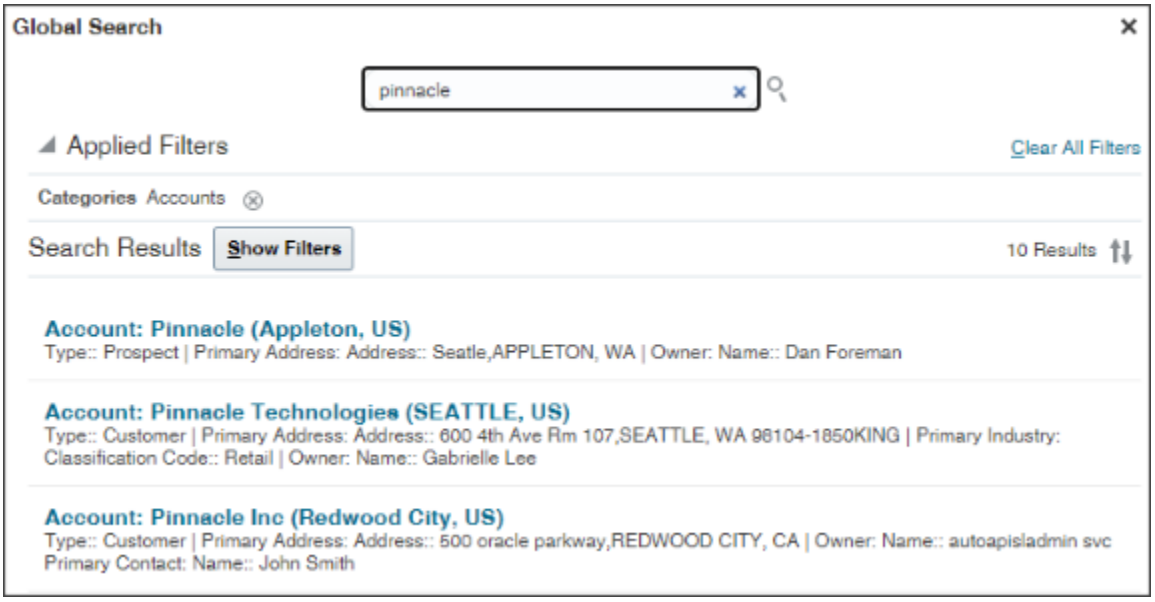
Configure Global Search Scope and Display of Search Results

You can specify which of the objects you enabled for Adaptive Search are searchable in Global Search and how the search results are displayed.

Each search result, includes:

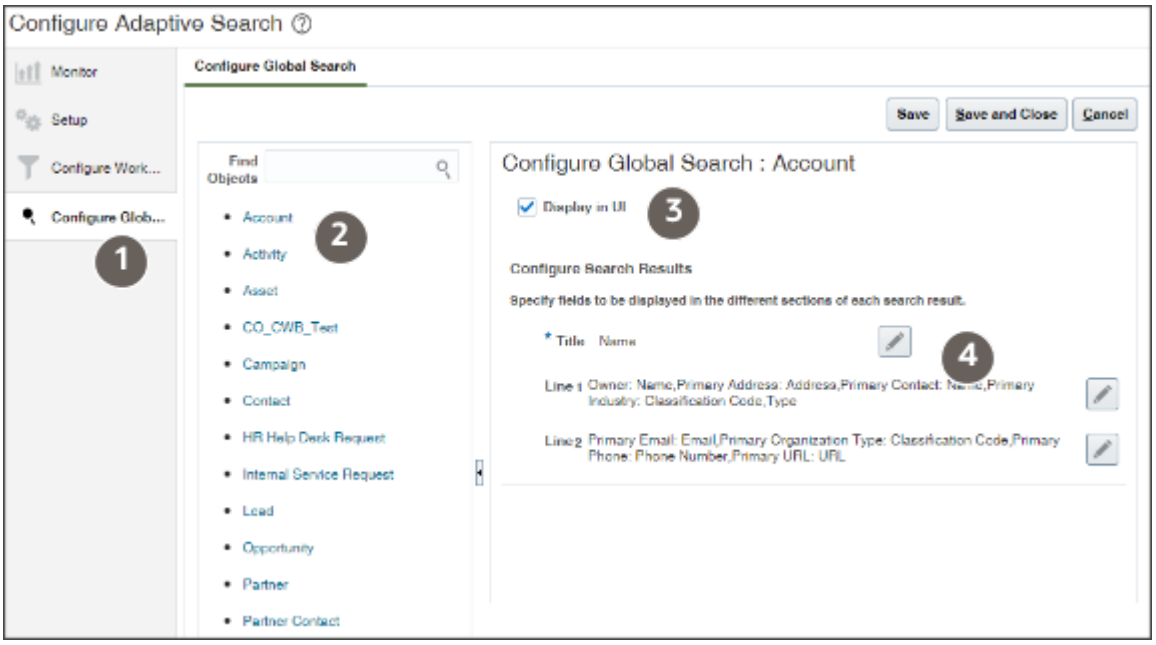
- A title that provides the link that users click to drill down into the record. By default, the name of the record is the title, but you can choose a different field.
- Two lines displaying fields you specify

Here is a screenshot showing the results of an account search:



1. In the Setup and Maintenance work area, open the **Configure Adaptive Search** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Configure Adaptive Search

2. In the Configure Adaptive Search page, click the **Configure Global Search** tab in the left-side of the page (callout 1 in the screenshot).



1. Configure each object you enabled for Adaptive Search:
    a. Click the object link in the **Objects** column on the left (callout 2).
    b. You can prevent users from using Global Search to search the object by deselecting the **Display in UI** option (callout 3). By default, users can search all objects you enabled for Adaptive Search.
    c. By default, users click on the record name link in the search results to drill into a record, but you can select a different field. To change the drill-down link, click **Title** (the pencil icon, callout 4) and select the alternate field.
    d. Click the **Line 1** edit button and select the fields you want to display in the first line under the title.
    e. Click the **Line 2** edit button and select the fields you want to display in the second line.
    f. Click **Save**.
2. When you complete configuring all the objects, click **Save and Close**.

Configure Global Search UIs

Optionally, you can configure the behavior of global search UIs. For example, you can specify which suggestions display automatically when users click in the search field and which objects display in search results. You can create different configurations for different application pages.

> **Tip:** If you already made a copy of the new OSC Default Global Search Configuration, then you can edit that copy and make your changes there. You don't need to create a second copy.

Duplicate the Default Configuration Provided by Oracle

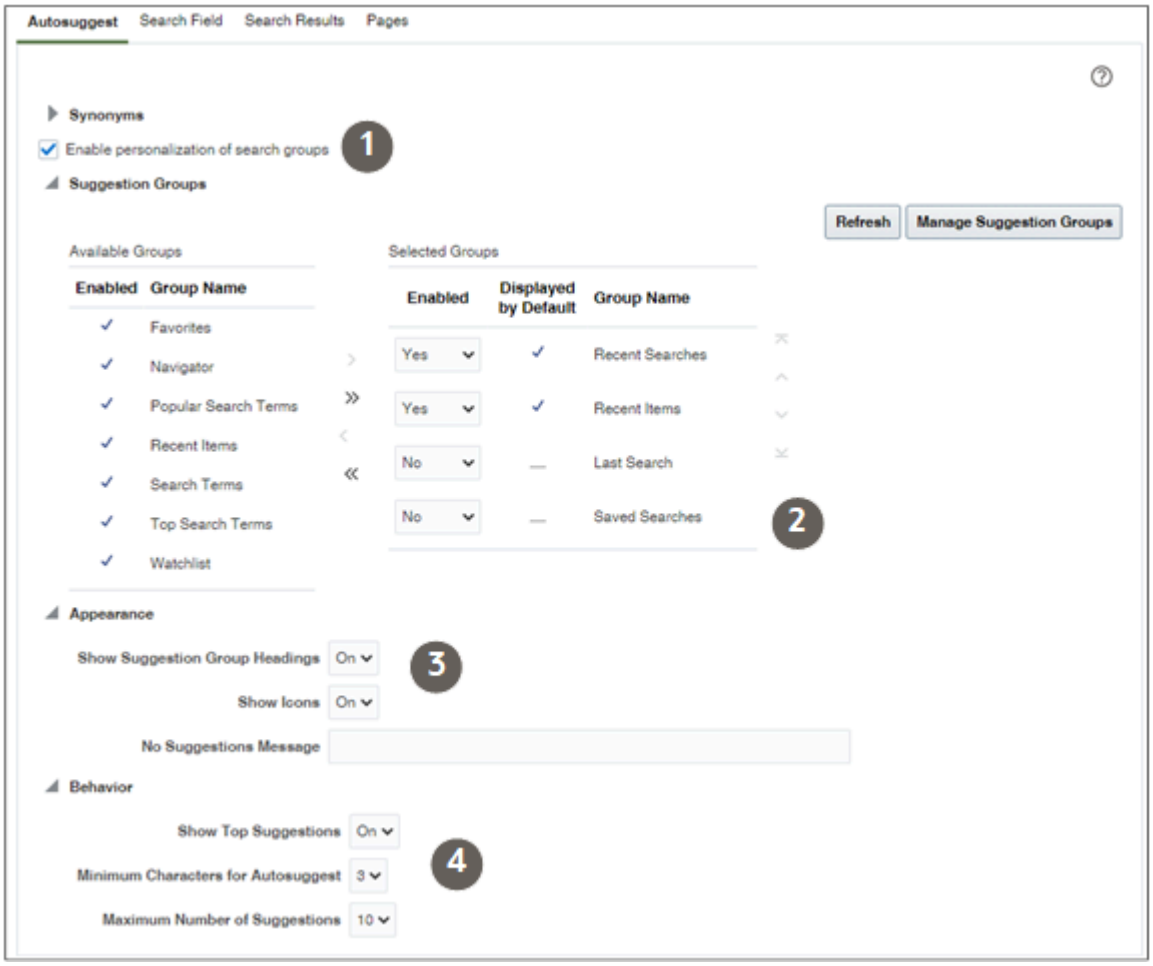
You can't make changes to the Global Search configuration provided by Oracle. You must copy the Oracle configuration and edit that copy instead. If you already created a copy, you can skip this step.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance**.

2. In the Setup and Maintenance work area, open the **Manage Global Search Configurations** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Manage Global Search Configurations
3. On the Manage Global Search Configurations page, select the configuration with the **OSC** short name and **Default Global Search Configuration** name.
4. Click **Duplicate** (the document icon).
5. In the **Short Name** field, enter an alphanumeric code with uppercase letters and no spaces.
6. Enter a name for your configuration in **Display Name**.
7. Select CRM as the product family and module.
8. Leave the **Default** option deselected for now. You select this option as a last step.
9. Click **Save and Close**.
10. Open the Manage Global Search Configurations page again.
11. Click the name link for the configuration you created.
12. Use the tabs to define your configuration:
    - **Autosuggest:** Determine what's available to users in the global search autosuggest, as well as how autosuggest looks and behaves.
    - **Search Field:** Control the **Search** field in the global header and in the search results dialog box.
    - **Search Results:** Specify if salespeople can personalize the filters used in their searches
    - **Pages:** Specify where you want your configuration to apply.

Define Which Groups of Suggestions Users See

1. While editing the global search configuration you created, click the Autosuggest tab.



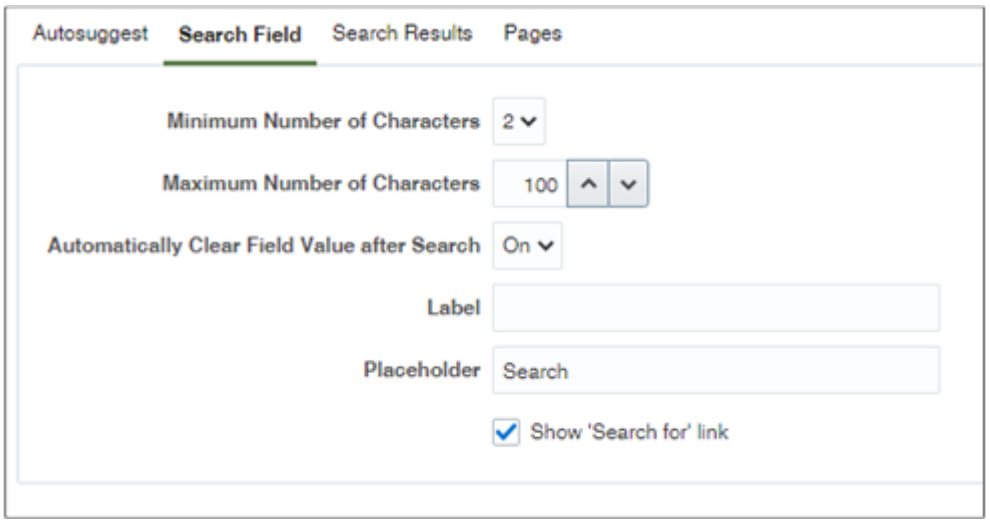
2. Skip setup of **Synonyms** as they don't apply to Sales.
3. Keep the **Enable personalization of search groups** option selected unless you want to prevent users from personalizing suggestion groups.
4. In the **Suggestion Groups** section:
    - Move the **Saved Searches** group (callout 2), and any other unwanted suggestion groups, to the **Available Groups** column. This action removes them from use. Saved searches can't be used with Global Search.
    - You can remove a suggestion group from being displayed by default by setting **Enable** to **No**. Users can still enable the group when they personalized their global search.
    - You can change the order the suggestion groups are presented to users.
    - You can change the suggestion group headings.
        i. Click **Manage Suggestion Groups**.
        ii. Duplicate an existing group and edit your copy.
        iii. Click **Refresh**.
        iv. Swap your copy for the original.
5. You can turn the suggestion group headings off in the Appearance section (callout 3).

6. You can change suggestion behavior (callout 4):
    - **Show Top Suggestions:** Enable this option to display suggestions in autosuggest as soon as the user clicks in the search field, even without entering a search term. For example, the last few pages the user opened would appear as suggestions in the Recent Items group.
    - **Minimum Characters for Autosuggest:** Enter the number of characters that users must enter in the search field before matching suggestions appear in autosuggest.
    - **Maximum Number of Suggestions:** Enter the maximum number of suggestions to be displayed across all suggestion groups. This total is distributed as equally as possible among the groups.

Configure the Global Search Field

Here are the main configurations for the global search box field:

- You can change the minimum and maximum number of characters required for search.
- You can specify a different word to appear in the Global Search box instead of "Search".



Configure How Salespeople Can Use Filters

- In the **Saved Search and Recent Search** section, you can disable the display of recent searches by deselecting **Enable recent searches**. Saved searches aren't available in global search.
- In the **Filters** section:
    - Keep **Enable personalization of search categories** selected unless you want to prevent users from specifying which objects they see in the search results. You determine the objects that show up as filters in global search while setting up Adaptive Search (see the topic Configure Global Search Scope and Display of Search Results).
    - **Enable clear all filters:** Allow users to clear all filters by clicking the **Clear All Filters** button in search results.
    - **Show applied filters:** Show all the filters that have been applied
- The **Search Categories** section and the rest of the sections on this tab don't apply to CX Sales.

Specify the Sales Pages Where Your Configuration Applies and Complete the Configuration

Entering the application pages is a one-time setup. If you're editing a configuration you created, then you don't need to reenter the page codes again. You can skip this step.

1. Enter codes (view IDs) for the applications or pages where you want your configuration to apply. Here are the entries for CX Sales:

View Type	View ID
Application	CRMPerformanceApp%
Application	ORA_CRM_SERVICESAPP%
Application	ORA_CRM_UIAPP%
Application	ORA_SERVICEAPP%
Application	SalesApp%
Application	ORA_FSCM_UIAPP%

   You can obtain other codes in Setup and Maintenance, using the Manage Taxonomy Hierarchy task as described the linked topic: Specify the Pages or Applications That a Global Search Configuration Applies To.
2. At the top of the page, select the **Default** option.
3. Click **Save and Close**.
4. Clear your browser cache and navigate to any of the sales pages to test your configuration.

9 Saved Searches

Saved Searches in Digital Sales and CX Sales

This chapter outlines how you create saved searches for different roles in the sales organization. You can create, share, and manage the saved searches in two separate UIs: one in Digital Sales and the other in CX Sales. Which UI you use doesn't matter. The result is the same.

Salespeople can use the saved searches in any of the UIs that use Adaptive Search. In Digital Sales, this includes all list pages and some lists of values (smart pickers). In CX Sales, this includes Workspace and the work areas powered by Adaptive Search. The saved searches you create are also available in CX Sales Mobile.

> **Note:** This guide explains how to create saved searches for UIs that use Adaptive Search. For an explanation of how to create saved searches for the legacy work areas that still use CRM Search, see the topic *Overview of Work Area Search Setup* in the Implementation Reference guide.

Overview of Saved Search Setup

Here's an overview of how you can create saved searches for different roles in your organization in both Digital Sales and CX Sales.

Step	Applies to	Description	Navigation	Where to Get More Details
1	Both Digital Sales and CX Sales	If you haven't already, review the list of fields available in Adaptive Search and make changes before you create saved searches.	N/A	*Adaptive Search Configuration Provided by Oracle*
2	Both Digital Sales and CX Sales	Create saved searches for different job roles in the sales organization. You accomplish this in either the Digital Sales UI or the CX Sales UI.	On any list page	For Digital Sales, see the topic *Create Saved Searches for the Sales Organization* For CX Sales, see: *Specify the List of Saved Searches for Different Job Roles*
3	Both Digital Sales and CX Sales	Share the saved searches with the appropriate job roles in the organization. You accomplish this in either the Digital Sales UI or the CX Sales UI.	Click in the search field in the list page and select **Manage Saved Searches**.	For Digital Sales, see the topic *How do I share a saved search with everyone or with specific job roles?* For CX Sales, see: *Specify the List of Saved Searches for Different Job Roles*

Step	Applies to	Description	Navigation	Where to Get More Details
4	Both Digital Sales and CX Sales	Specify which saved search appears by default when a user opens each work area.	Click in the search field in the list page and select **Manage Saved Searches**.	For Digital Sales, see the topic: *Specify Which Saved Search Appears for Users by Default*. For CX Sales, see: *Specify the List of Saved Searches for Different Job Roles*
5	Digital Sales	If the saved search is for a lead or contact, you can specify if you want users to see the first item in the list instead of the list itself.	Click in the search field in the list page and select **Manage Saved Searches**.	See the topic *Display the First Record in Leads and Contact Lists*.
6	Digital Sales	You can create a visualization (a chart) of the data in a saved search.	Navigate to **Configuration** > **Application Composer**.	See the topic *Create Visualizations*.
7	Digital Sales	You can add shared saved searches and any visualizations you create for them to the Sales Dashboard. You can display a saved search in the Sales Dashboard as a Metric Card (one of the tiles across the top), as a list, or as a table.	VB Studio	See the topic: *Create Visualizations*
8	CX Sales	For each job role, you can specify which business object and saved search they see when they open Workspace or a work area for an object.	Manage Saved Searches page in Workspace.	See the topic: *Specify the List of Saved Searches for Different Job Roles*

Saved Searches in Digital Sales

Saved Searches Targeted at Different Users

As a sales administrator, you can configure saved searches targeted to different job roles in the sales organization.

> **Note:** The saved searches you create in Digital Sales are identical to those you create in Oracle CX Sales Workspace and work areas powered by Adaptive Search. You can create, delete, and otherwise manage searches in either application, and the saved searches are available to users of both applications.

Configuring the saved searches for each work area involves two steps:

1. Create the saved searches in the landing page for each sales object. When you name your searches, keep in mind that users see them listed in alphabetic order.

2. Use the Manage Saved Searches page to share your saved searches with everyone or with the appropriate job roles. You can configure different lists of saved searches for different job roles, specify the search that runs by default when users open the work area, and you can hide the saved searches provided by Oracle.

While you can configure saved searches for the sales organization, every user can personalize the list of saved searches in each work area for their own use. They can save their current search criteria and their preferred way of displaying search results as a new saved search. Every user can specify which saved search runs by default whenever they open that particular work area. Users can also hide any saved searches they don't want to see.

Review What Searches Are Available for a Sales Object

Here's how to review saved searches available for a particular sales object.

1. Navigate to the appropriate work area landing page. Each business object has its own list of saved searches.
2. Click in the search field and select **Manage Saved Searches** .
3. From the Manage Saved Searches page, **Visible To** list, select **Me**. The Me list includes saved searches you created and haven't shared, the saved searches visible to everyone, and all of the saved searches visible to the job roles assigned to you. Saved searches provided by Oracle are shared with everyone and list Oracle as the owner.
4. Different job roles may have saved searches available to them that won't appear on your **Me** list. To ensure you see all of the saved searches, cycle through all the job roles in the **Visible To** list.

Create Saved Searches for the Sales Organization

Creating a saved search that you can share with the sales organization is as simple as clicking the save button on the landing page.

The new saved search includes not only your current search criteria and keywords, but also your preferred way of displaying and sorting the results. Here are the details:

1. Click **Actions** > **Save** on the list page.
2. In the dialog box, enter the name for your saved search.
3. Click **Save**.

   Your new saved search is now listed in the Manage Saved Searches page. You're now ready to share the saved search with the sales organization. For details, see the topic *How do I share a saved search with everyone or with specific job roles?*.

Manage Saved Searches Page

As a sales administrator, you can use the Manage Saved Searches page to specify saved searches for others in the sales organization. You can also use the page to maintain your own list as does any other user, as described in the Using Digital Sales guide.

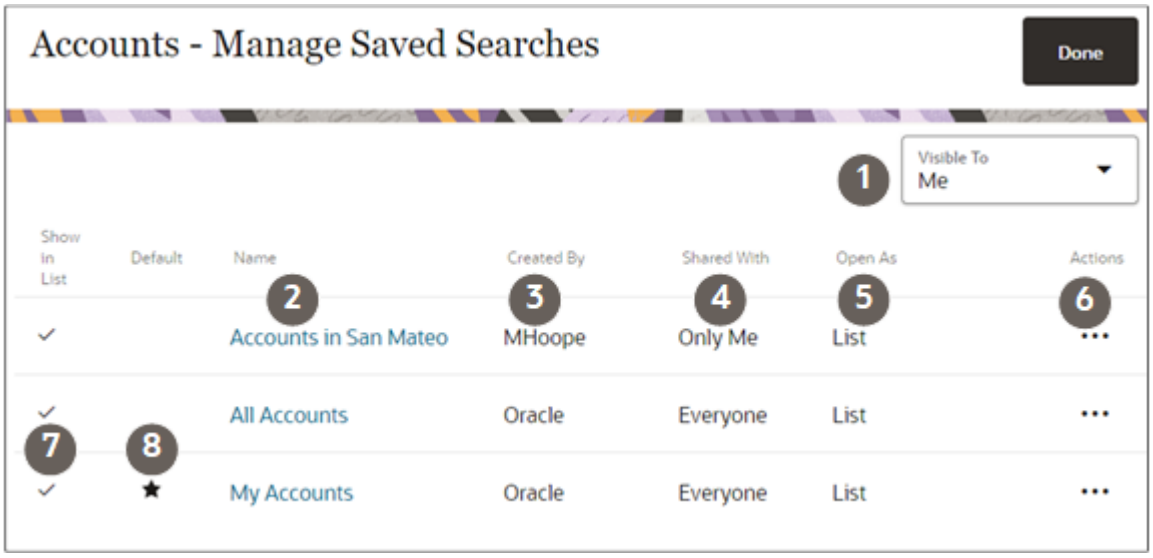
Here's what you can do on the Manage Saved Searches page:

- Share saved searches you created.
- Remove from use any saved searches provided by Oracle that you don't need. You can't delete the saved searches Oracle provides, but you can unshare them.

- Specify which saved search appears by default when users navigate to the work area.
- Delete any saved searches you created.
- Create different lists of saved searches for different job roles.
- For contacts and leads, you can choose to display the first record in the list rather than the list itself.

Here's an annotated screenshot to give you an overview:

Callout Number	Column	Explanation
1	Visible To	Access the different lists of saved searches for different job roles. Each role can have its own configuration.
2	Name	Clicking on the name of the saved search displays the search results.
3	Created By	You can only delete saved searches created by your organization. You can't delete saved searches created by Oracle, but you can unshare them so they're visible only to you.
4	Shared With	Saved searches you create are personal (Shared With Only Me) unless you share them.
5	Open As	**List**: The saved search displays results as a list. For lead and contact saved searches only, you can instead open the first record in the list (**Detail**).
6	Actions	The **Actions** menu (three dots) displays the available actions for each saved search.
7	Show in List	Indicates if the saved search is visible or hidden from you when you put your cursor in the search field on the landing page.
8	Default	For each list of saved searches, you can specify a different saved search to run by default when users open the landing page. Users can always specify their own default.



How do I share a saved search with everyone or with specific job roles?

You can configure the saved search setup to specify the saved search that appears by default whenever a user opens the work area. You can also setup saved searches to share with everyone or to share with each specific job role.

After you create a saved search, it's initially visible only to you. Here's how to share it with the whole sales organization or with individual job roles.

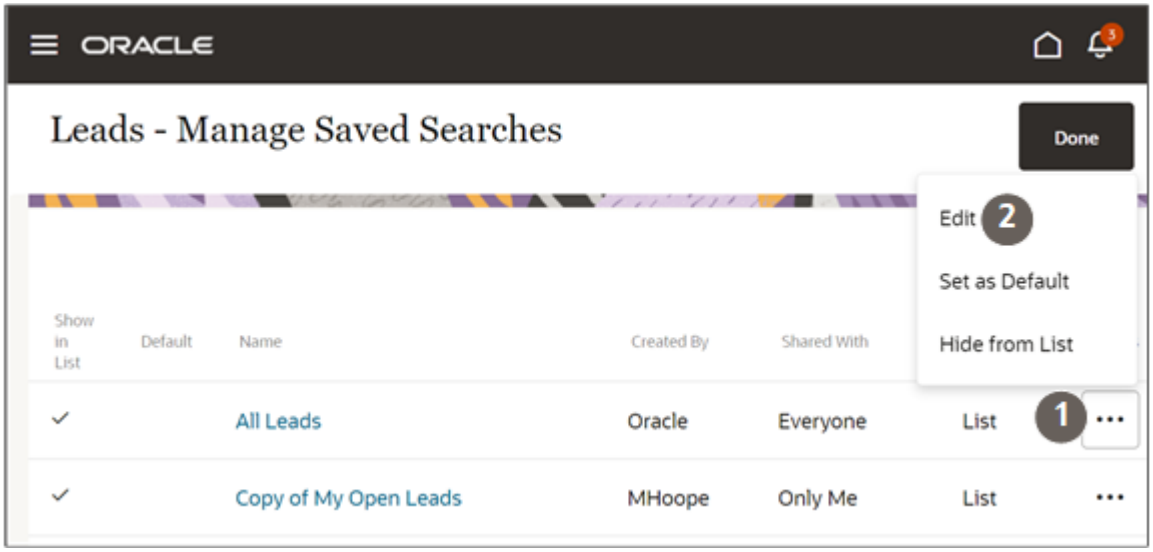
1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, select **Me**.
4. Click **Actions** (the three dots in the Actions column) for the saved search you want to share and select **Edit**.
5. Make a selection from the **Shared With** list:
    - If you're making the saved search available to the whole sales organization, select **Everyone**.
    - If you're making it available for specific roles, here's how to add them:
        i. Select **Specific Roles**.
        ii. Click **Add**.
        iii. Select the role.
        iv. Click **Save** (the check mark icon).
6. Click **Save**.

If you shared the saved search with job roles that aren't assigned to you, then the saved search is no longer visible on your page. To see it, select one of the job roles assigned to it from the **Visible To** list.

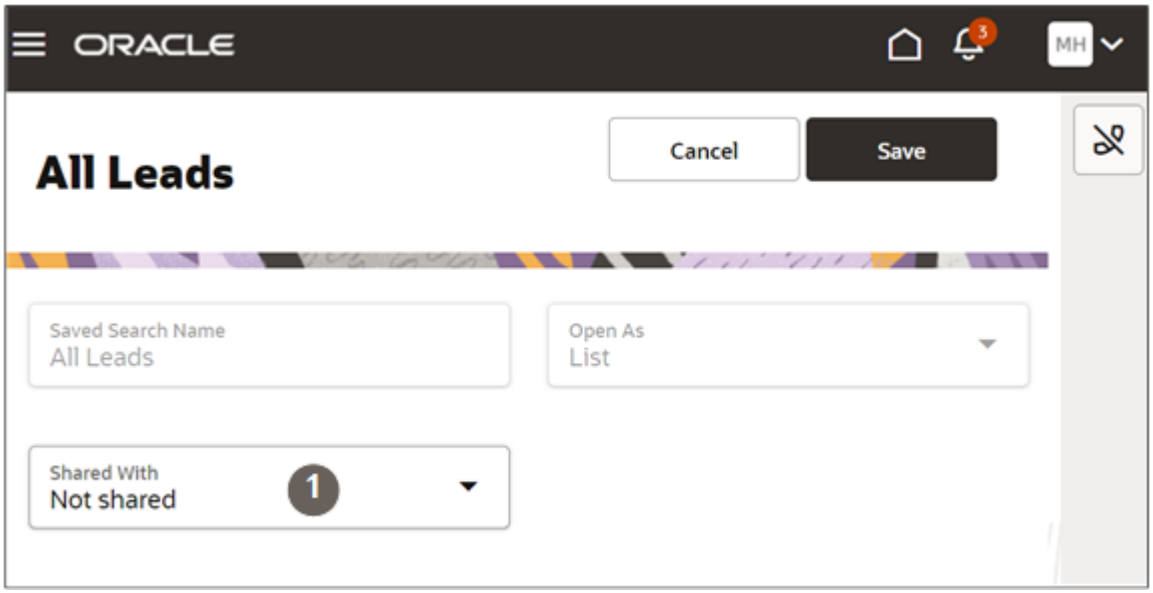
Remove a Saved Search from Use by Unsharing It

As an administrator, you can remove saved searches from use entirely by unsharing them. Doing so removes them from the lists of saved searches for all users except yourself. Use this method to remove from use any saved searches provided by Oracle that you don't need.

1. Place your cursor in the search field on the landing page and select **Manage Saved Searches**.
2. On the Manage Saved Searches page, click **Actions** (the three dots) for the saved search you want to remove, and select **Edit**.



3. On the edit page, click **Shared With** and select **Not shared** (callout 1 in the screenshot).



4. Click **Save**.

The saved search is now visible only to you. It's removed from use for the entire organization.

Specify Which Saved Search Appears for Users by Default

For each business object, you can specify the saved search that appears by default whenever a user opens the work area. You can specify different defaults for each job role.

1. Navigate to the work area.
2. Click in the search field and select **Manage Save Searches**.
3. From the **Visible To** list, select the job role where you want to define the default.
4. Click **Actions** (the three dots in the Actions column) for the saved search and select **Set as Default**.

Rename a Saved Search

You can rename saved searches you created. Saved searches are listed in alphabetic order for users when they put their cursor in the search field.

1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, select **Me** to see the lists that you shared with everyone and those you haven't shared yet. If you shared the list with a specific job role, and that job role isn't assigned to you, then you must select that job role to see the saved search that you want to rename.
4. Click **Actions** (the three dots in the Actions column) and select **Edit**.
5. Enter a new name.
6. Click **Save**.

Delete a Saved Search You Created

You can delete saved searches you and other administrators created. Your action deletes the saved search for every role where it is shared. You can't delete saved searches provided by Oracle, but you can hide them.

1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, select **Me** to see the lists that you shared with everyone and those you haven't shared yet. If you shared the list with a specific job role, and that job role isn't assigned to you, then you must select that job role from the list to see the saved search you want to delete.
4. Click **Actions** (the three dots in the Actions column) and select **Delete**.
5. Click **Save**.

Display the First Record in Leads and Contact Lists

For contacts and leads only, you can display the first record in the list rather than the list itself. Salespeople then work through the items in the list by clicking **Next** to get the next record. You can specify a different default for different job roles.

1. Navigate to the work area.
2. Click in the search field and select **Manage Saved Searches**.
3. From the **Visible To** list, make a selection that matches how the list is shared. For example, if the list is shared only with Inside Sales Representatives, then select that job role.
4. Click **Actions** (the three dots in the Actions column) for the saved search and select **Edit**.
5. In the **Open As** field, select **Detail**.

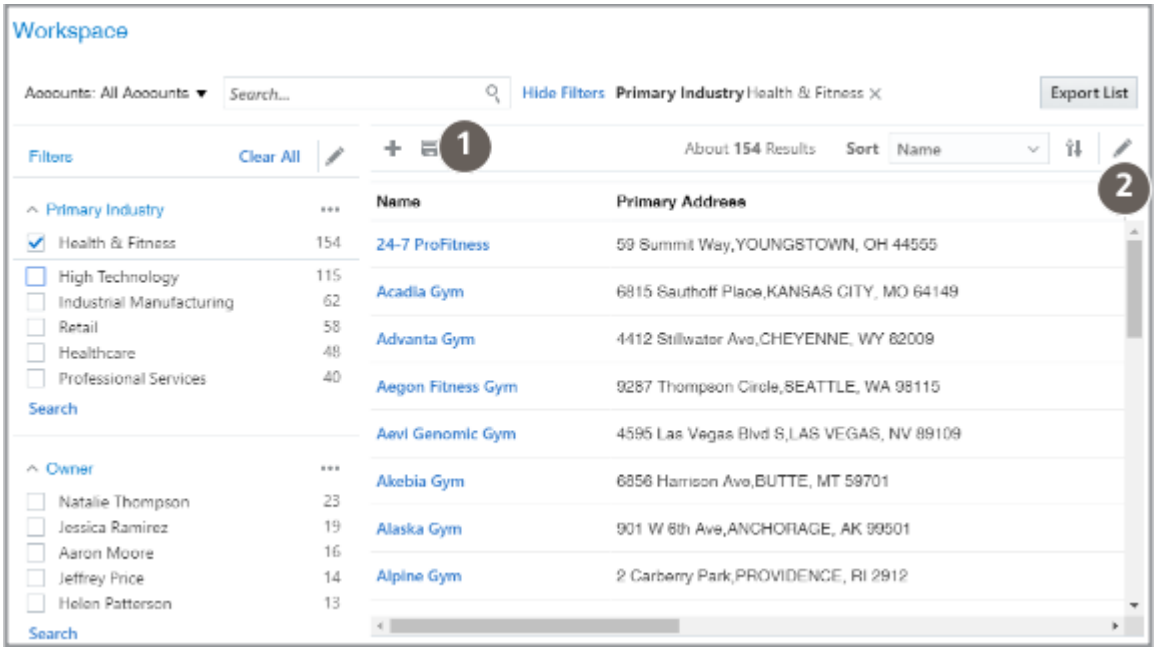
Saved Searches in CX Sales

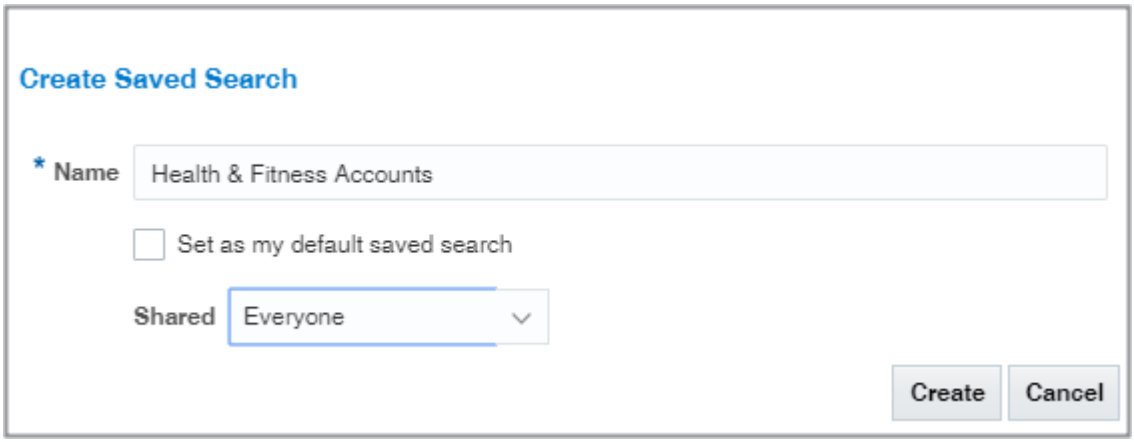
Create Saved Searches

Here's how you can create saved searches in the CX Sales UI either for yourself or for others in the organization. The saved searches you create are the same ones you create in Digital Sales. You're just creating them in a different UI.

1. In Workspace, select a saved search as your starting point. For example, the **All Accounts** saved search provided by Oracle lets you create your saved search for all the accounts you can see.
2. Enter your search terms. You can enter search terms in the **Search** box, add filters, select filter values, or any combination of these.
3. You can add or change the columns displayed in the search results by clicking **Edit Columns** (the pencil icon highlighted by callout 2 in the following screenshot).

4. Click **Save As** (highlighted by callout 1).





5. Enter the name for your saved search. Remember that the saved searches are listed in alphabetic order.
6. To make this saved search the default saved search for you personally, select the **Set as my default saved search** option. The default saved search is what you see whenever you navigate to Workspace.
7. Specify how you want to share the saved search you're creating. There are three options:
    - Only Me
    - Everyone
    - Specific Roles
8. If you selected **Specific Roles**, click **Search** (the people icon) and select the job roles.
9. Click **Create**.

Overview of the Manage Saved Searches Page

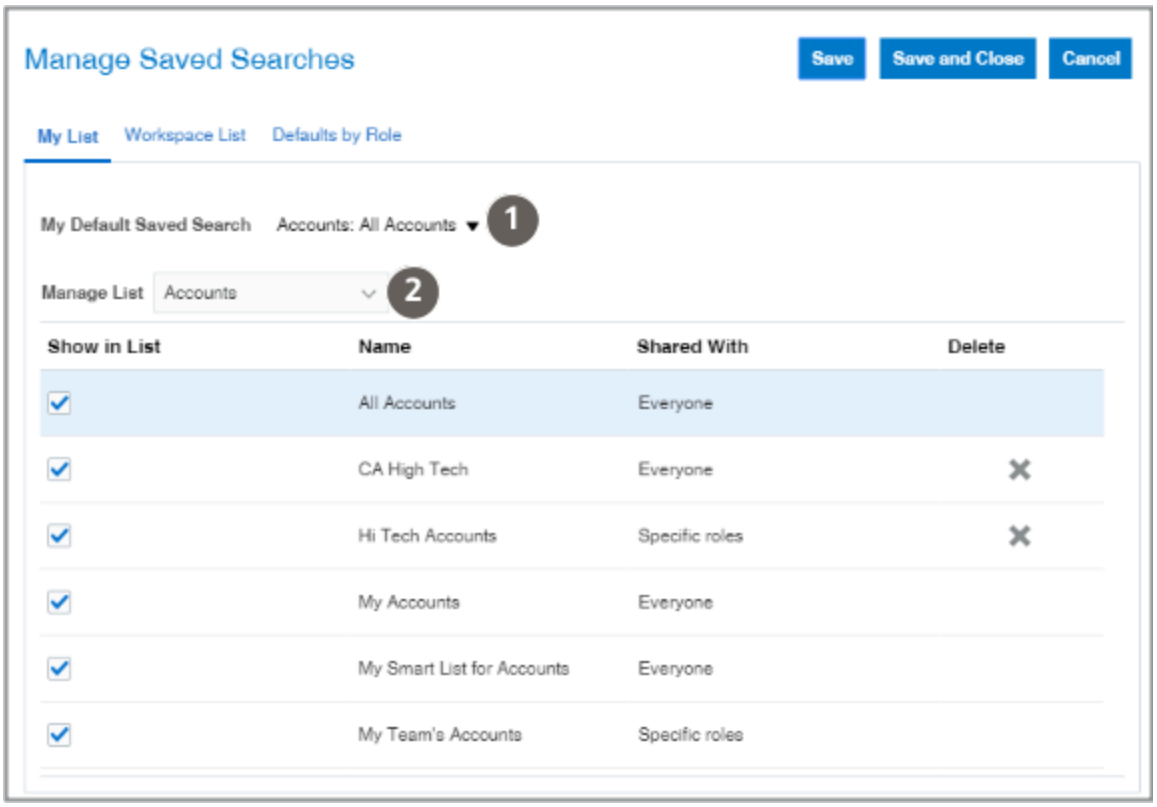
Use the Manage Saved Searches page to manage your own list of saved searches, manage the lists sales users see, and to specify the default saved search different roles see when they open Workspace.

My List

On the **My List** tab, you can manage your own personal lists of saved searches (there's a separate list for each business object).

- You can specify which saved search displays when you navigate to Workspace by making a selection from **My Default Saved Search** (callout 1 in the screenshot).
- To view the saved searches for a specific business object, just make a selection from **Manage List** (Callout 2 in the screenshot).
- You can hide individual saved searches by deselecting **Show in List**.
- You can delete only saved searches that you created.

  While you can't delete saved searches provided by Oracle, you can hide them.



Workspace List

On the **Workspace List** tab, you can share saved searches with everyone, with specific user roles, or with no one.

For each business object that you select from Manage List (callout 1 in the following screenshot), you can:

- Specify who can view each saved search by specifying a value in the **Shared With** column (callout 2 in the screenshot).
    - For saved searches provided by Oracle, you can either share the saved search with everyone or not share it at all, effectively hiding it from use.
    - For saved searches created by you or other administrators, you can select one of the following:
        - Only Me

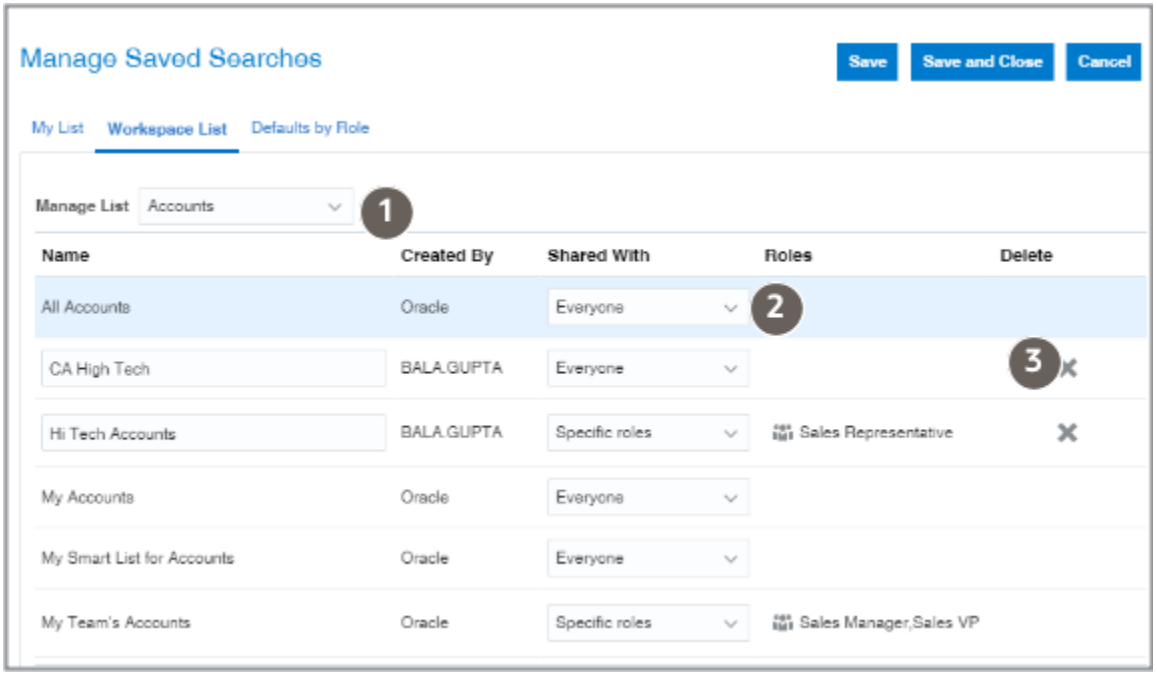
          Makes the saved search a personal saved search that you can manage on the My List tab.
        - Everyone

          Makes the search available to all roles.
        - Specific Roles

          Makes it possible for you to specify one or more specific job roles that can see the saved search.
        - Not Shared

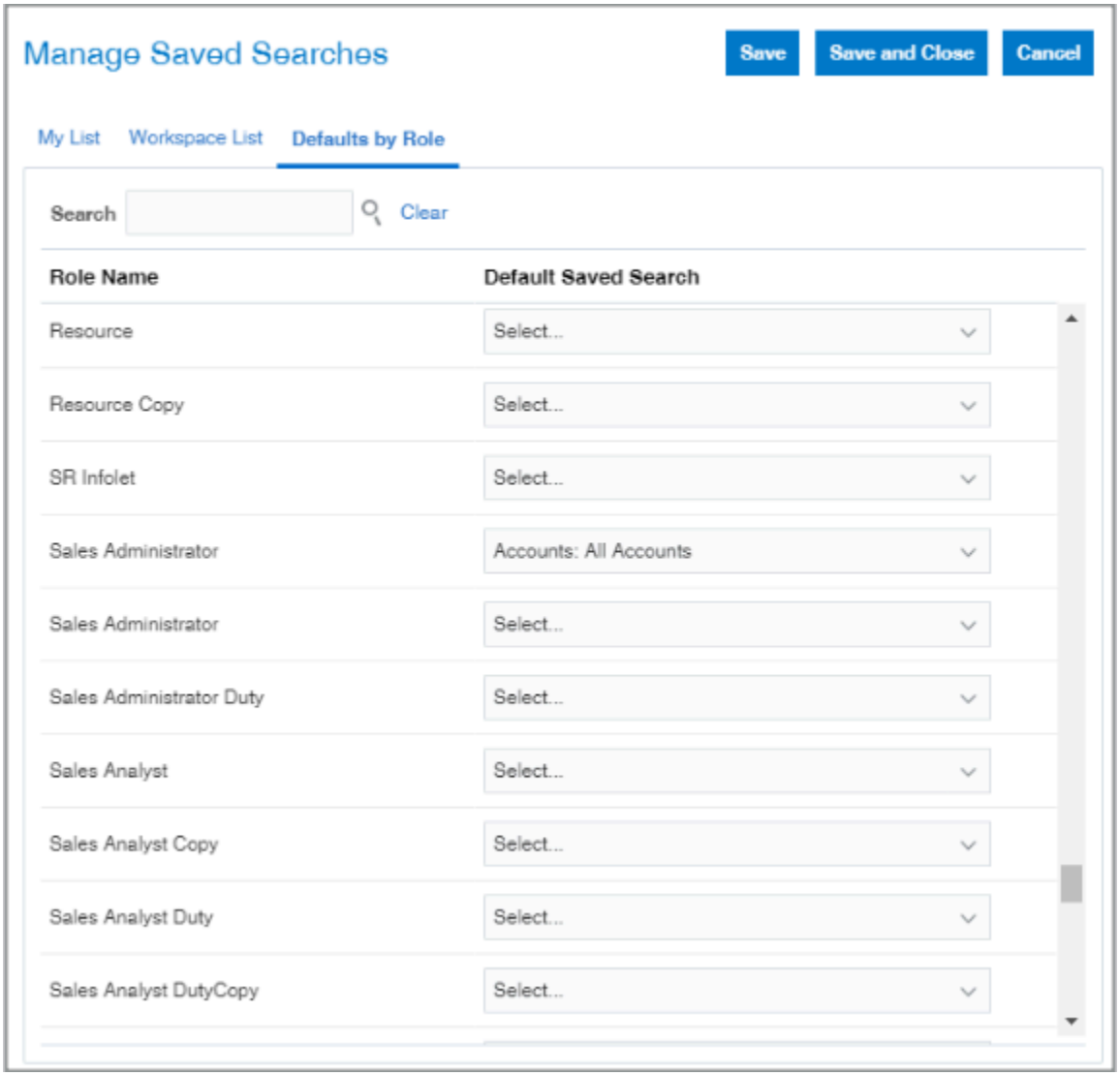
          Removes the search from use.
- You can delete only saved searches that you created (callout 3 in the screenshot).

  While you can't delete saved searches provided by Oracle, you can remove it from use by selecting the **Not Shared** value in the **Shared With** column.



Defaults by Role

Use the **Defaults by Role** tab to define the default saved search for each job role. This is the saved search that users with the job role see when they open Workspace.



Specify the List of Saved Searches for Different Job Roles

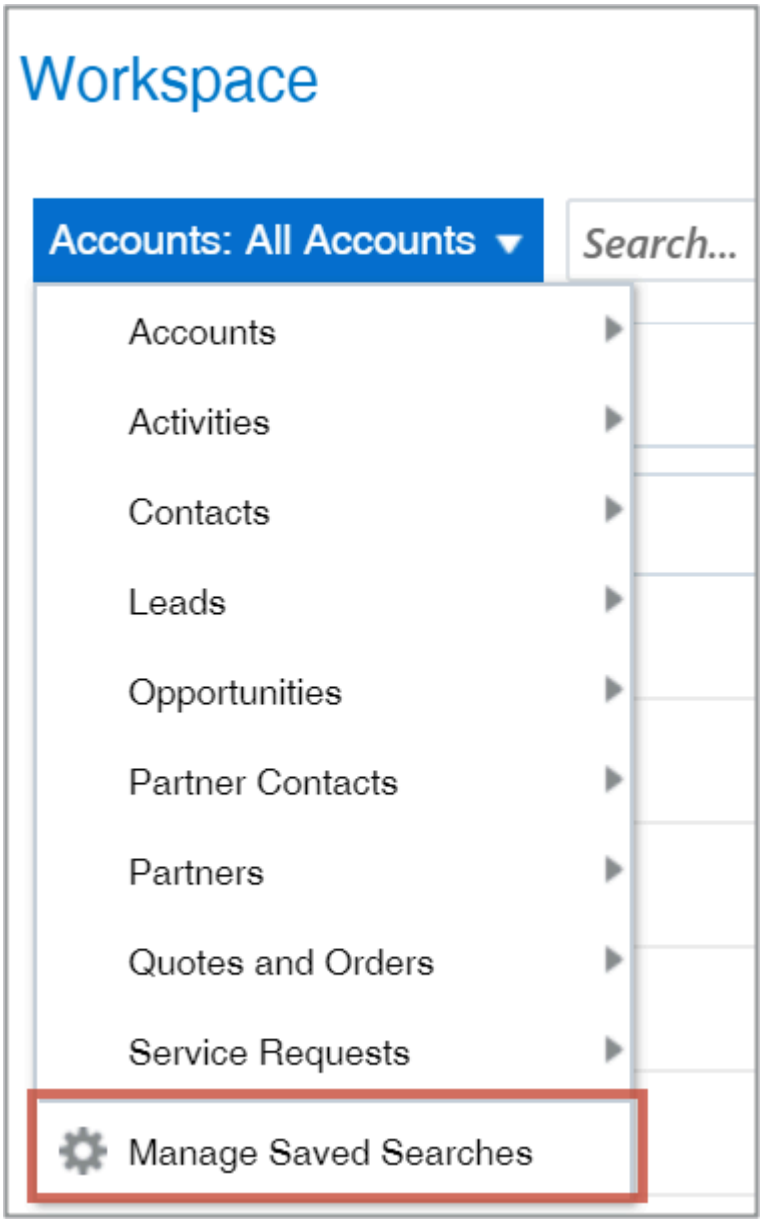
Specify the lists of saved searches that are available for each business object in Workspace. You can create different lists for different job roles. The saved searches appear in ascending alphabetic order in the list.

The same saved searches show up as filters in actionable infolets. For example, because All Accounts starts with the letter A, users see All Accounts when they view the My Accounts actionable infolet, unless you create a different saved search to appear on top. To display the most critical sales information for sales users by default, remove the All Account saved search from the list by hiding it and replace it with a more appropriate saved search. If need be, you can recreate saved searches and rename them to get the order you want.

Here's how to configure the list:

1. In Workspace, click the drop-down list you use to select the object and saved search.

2. Select **Manage Saved Searches** (highlighted in the screenshot).



3. Click **Workspace List**.
4. Select the business object in **Manage List** (callout 1 in the following screenshot)

5. Specify who sees which saved searches for each object. Here's how:
    - For each saved search, specify who can see it by making a selection in the **Shared With** column (callout 2 in the screenshot).
        - For saved searches provided by Oracle, you can either share the saved search with everyone or not share it at all, effectively hiding it from use.
        - For saved searches created by you or other administrators, you can select one of the following:
            - Only Me

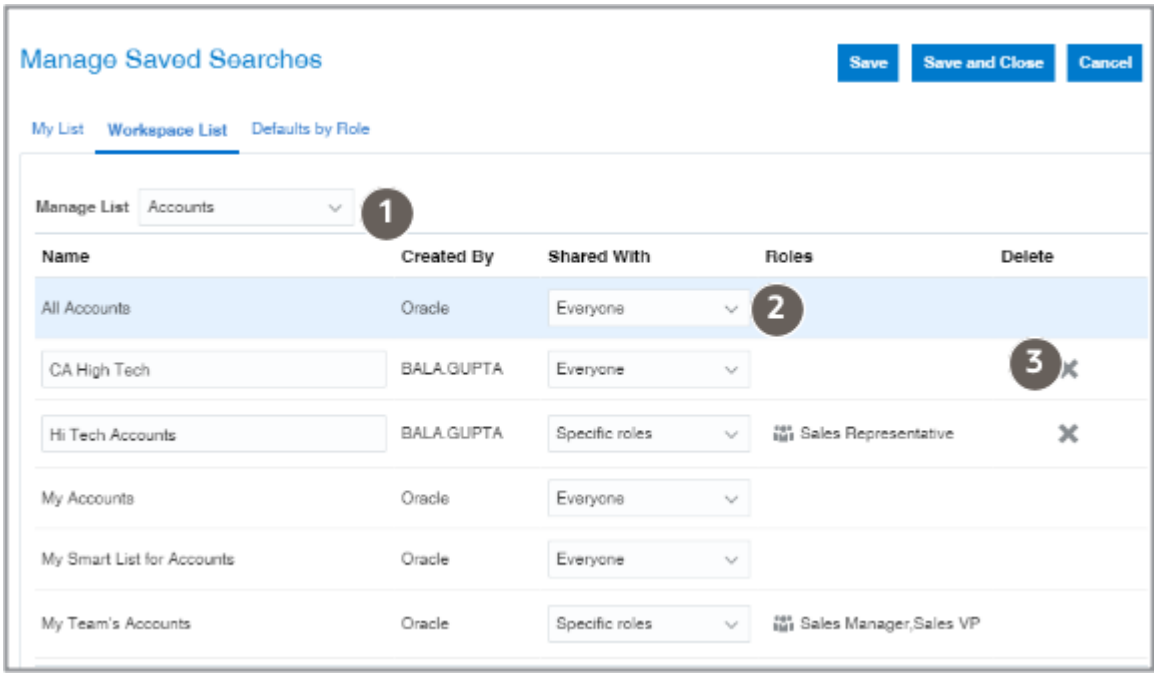
              Makes the saved search a personal saved search that you can manage on the My List tab.
            - Everyone

              Makes the search available to all roles.
            - Specific Roles

              Makes it possible for you to specify one or more specific job roles that can see the saved search.
            - Not Shared

              Removes the search from use.
    - You can delete only saved searches that you created (callout 3 in the screenshot).

      While you can't delete saved searches provided by Oracle, you can remove it from use by selecting the **Not Shared** value in the **Shared With** column.



6. To specify the default saved search users see when they open Workspace, click **Defaults by Role** and select the default saved search for each role.
7. Click **Save and Close**.

Specify What Users See When They Open Workspace

For each job role, you can specify which business object and saved search they see when they open Workspace or a work area for an object.

1. In Workspace, click the drop-down list you use to select objects and saved searches.
2. Select **Manage Saved Searches**.
3. In the Manage Saved Searches page, click **Defaults by Role**.
4. Select the default saved search for each role
5. Click **Save and Close**.

10 Users and Security

Overview of Users and Security

Access to your sales application's functionality and data is secured using role-based access control. In a role-based access control model, users are assigned roles, and roles are assigned access privileges to protected system resources.

Oracle provides predefined job and abstract roles that you assign to users to give them access to application data and functionality. Job roles provide users with the permissions they need to perform tasks that are specific to a job. Abstract roles provide users with the permissions to complete tasks that are common to all users.

To create users and provision them with roles, you perform Sales Setup tasks listed for the Users and Security functional area. For information about creating users and provisioning them with roles, see these chapters of the guide:

- Get Ready to Create Sales Users
- Create Sales Users in the UI

The predefined job roles provide users with access to both CX Sales and Digital Sales UIs:

- Sales Representative
- Sales Manager
- Sales VP
- Sales Administrator

This chapter introduces each of the security configuration work areas you can use to review and configure your security setup and describes the data sharing mechanisms used to give users visibility to sales object records. For additional information about setting up and configuring security, see the Securing Sales and Fusion Service guide.

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.

Data Sharing and Visibility

Review the information in this section to learn how users gain visibility to data for various objects used in the sales application.

The conditions specified in access group rules or data security policies control visibility to record-level data associated with a schema object, such as an opportunity. Conditions can use the following components as mechanisms for sharing data, provided that the sharing mechanism is applicable for the object:

- Team membership
- Territory assignment
- Resource and territory hierarchy
- Business unit assignment

For example, for the Opportunity object, data can be shared through team membership, through the resource hierarchy, or through territory membership.

> **Note:** Users assigned the Sales Administrator job role get full access to all object data. This access is based on their privileges, regardless of where the administrators are in the management hierarchy or their team membership.

How Sales Users Gain Access to Sales Information

The security reference implementation provided by Oracle determines who can access opportunity information in your sales organization. While basic information on accounts and contacts is available to all salespeople, your access to sales data is restricted by your position in the resource hierarchy, membership in the sales team, and ownership.

Whether or not you can access a particular opportunity or a lead depends on your membership in the resource and territory hierarchies. Here's how you gain access to opportunities. Lead access follows the same pattern. You can access an opportunity if:

- You create the opportunity.
- You're on the opportunity sales team.
- The opportunity owner or sales team member is your direct or indirect report in the resource hierarchy.
- You're the owner or are a member of the territory assigned to the opportunity.
- You're the owner or member of a parent territory of the territory assigned to the opportunity.
- You're assigned to a territory for the account associated with the opportunity.
- You're assigned to a territory that's a parent of the territory for the account associated with the opportunity.

Salespeople can see all opportunities related to their accounts but access differs between territory members and opportunity members:

- An opportunity owner gets full access to the opportunity, which includes the ability to edit as well as add and remove team members.
- Owners and members of territories or parent territories assigned to the opportunity account get read-only access to the opportunity and aren't added to the opportunity sales team.

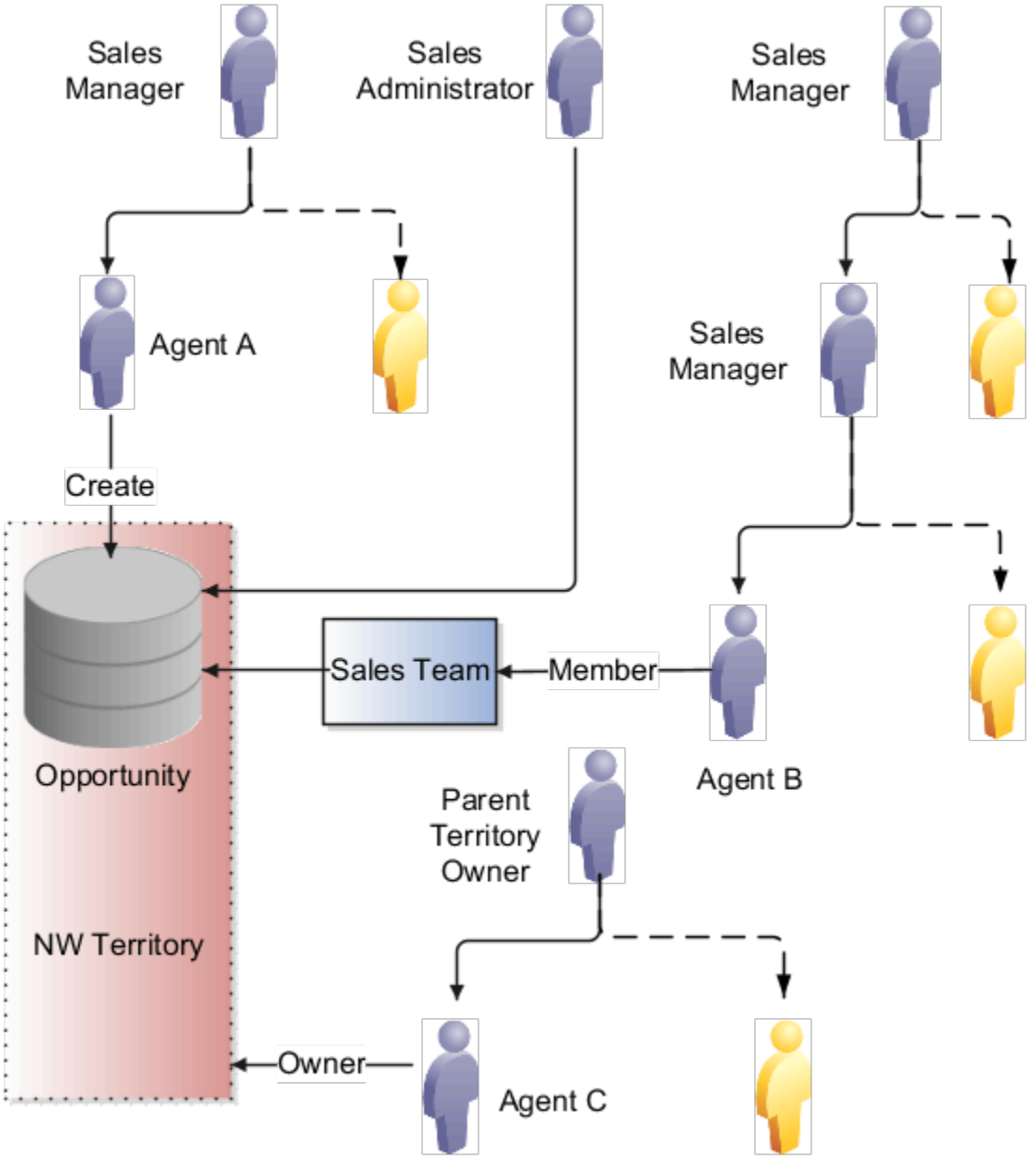
- Owners and members of territories assigned to the opportunity product lines are added as a distinct list of territories to the opportunity sales team. Owners and members of these territories get full access to the opportunity. Depending on a profile option, either only the owner or all the members of the territory are added as resources to the opportunity sales team. Regardless of the access level for these members as a resource on the opportunity team, they always have full access.

  Owners and members of parent territories of the territory assigned to the opportunity aren't added to the opportunity sales team but they always get full access.

The following diagram illustrates some of the different ways that you can gain access to an opportunity:

- Named agents in the diagram (A, B, and C) can access the opportunity.
- Unnamed agents (highlighted in yellow) can't access the opportunity.
- Sales managers can access the opportunity because a salesperson in their management chain has access.
- Owners of parent territories can access the opportunity through the sales territory hierarchy.

This diagram shows who in a sales hierarchy can access an opportunity.



- Agent A can access the opportunity because she created it. When you create an opportunity, you're the initial owner.
- Agent B can access the opportunity because he's on the sales team.
- Sales managers who are higher up in the management chain can also see the opportunity because access is provided through the resource hierarchy. The managers of Agent A and Agent B can access the opportunity information, but agent A and Agent B's colleagues can't.
- Agent C can access the opportunity because he's the owner of the NW territory. The owner of the parent territory can also access the opportunity.
- Sales administrators can access the opportunity.

Note: Access using accounts isn't shown in this diagram.

Special Access

Some access isn't affected by the management hierarchy and membership in sales teams or territories. This special access includes:

- Administrators: Users assigned the Sales Administrator job role get full access to opportunities and other objects. This access is based on their privileges, regardless of where the administrators are in the management hierarchy. Administrators don't have to be on the sales team or members of territories.
- Deal Protection: Salespeople assigned to an opportunity retain the sales credit on an opportunity even if they're moved to another opportunity.

How Sales Users Gain Access to Digital Sales Objects

Three objects are specific to Digital Sales: the Sales Contests object, the Sales Goals object, and the Sales KPI object. Sales users with access to the Digital Sales UIs gain access to these object records through a number of access paths. Review the following sections to learn who can create and view sales contests, sales goals and sales KPIs.

How Users Gain Access to Sales Contests

You can access data about a sales contest if you're the owner of the contest, are a participant in the contest, or if you're in the management hierarchy of the owner or a participant. All users who have access to a contest can view data for all contest participants. Specifically, you can access a sales contest if:

- You create the contest. If you create a contest, you're the contest owner.

  Sales Managers, Sales VPs, and the Sales Administrators can create contests. Sales Managers and Sales VPs can only add participants from their own downward hierarchy to the contest. Sales Administrators can add any users as participants.
- You're a participant in the contest.

  Users added to a contest can view contest data for themselves and for all other participants in the contest.
- The contest owner or participant is your direct or indirect report in the resource hierarchy.

  You can view contest details for your reports.
- The user who owns the contest can edit or delete the contest.
- Sales administrators can view all contests and can edit and delete any contest.

Once a contest is running, the contest owner, all participants, and the management hierarchy of the participants receive access to view the contest. Everyone who gets access to the contest can see the same information. So, for example, contest participants can see each other's scores on a given KPI, along with statistics such as the daily average score of each participant.

How Users Gain Access to Sales Goals

Whether or not you can access data about a particular sales goal depends on your membership in the resource hierarchy and whether or not you're a goal participant. In general, you can access goal data for yourself and for your direct and indirect reports. Specifically, you can access a goal if:

- You create the goal.

The user who creates the goal can view the goal and can edit and delete the goal.

Sales Managers, Sales VPs, and the Sales Administrator can create goals. When creating a goal, Sales Managers and Sales VPs can only add users from their own downward resource hierarchy as participants of the goal. Sales Administrators can add any users as goal participants.

- You're a participant of the goal.

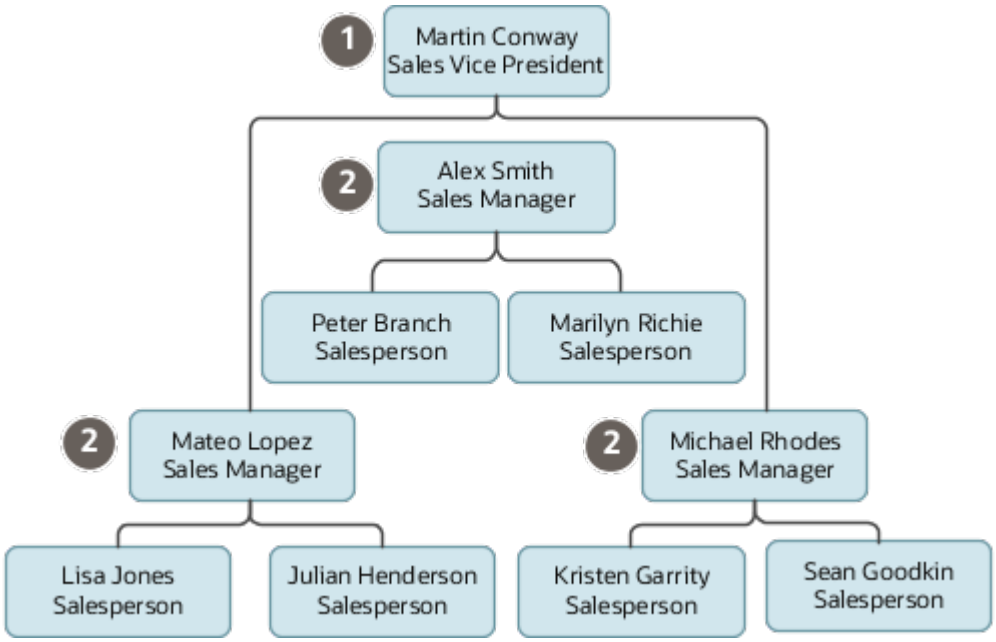
  Each participant can see only their own goal target and progress.

- The goal owner or participant is your direct or indirect report in the resource hierarchy.

  Members of the management hierarchy of a goal participant can view goal data and edit targets for goal participants in their own downward resource hierarchy.

  For example, the following figure shows an example sales hierarchy consisting of a sales VP who has three sales managers reporting to him. Each of the sales managers has a team consisting of two direct reports. If Martin Conway, the sales VP, sets a goal for all the sales people in his organization, then each member of the hierarchy has access to goal performance data according to their own position in the hierarchy as follows:

  a. (Callout 1) Martin Conway can see goal performance data for each of the three sales teams and for each participant in each team.
  b. (Callout 2) Each sales manager can see goal performance data for their direct reports. So Alex Smith can see goal data for Peter and Marilyn but not for any of the salespeople on Michael or Mateo's teams.
  c. Each individual salesperson can see their own goal performance data but can't see goal data for anyone else.



- Sales administrators can access all goals and all goal participants, and can edit and delete any goal.

How Users Gain Access to Sales KPIs

Oracle provides a number of predefined key performance indicators (KPIs) that sales managers can use for creating goals and contests but you can also create your own KPIs. All users can view KPIs but only sales administrators can create and manage KPIs. You can access sales KPI data as follows:

- All users can view the predefined sales KPIs.

  Sales Managers, Sales Representatives, Sales VPs, and Sales Administrators can view the predefined sales KPIs.
- Only sales administrators can create custom KPIs.

  Sales Managers, Sales Representatives, and Sales VPs can view all active, custom sales KPIs.
- Sales administrators can update, delete, and change the status of custom KPIs. Sales administrators can also change the status of predefined KPIs and can copy predefined KPIs.

Privileges for Digital Sales

This topic lists the Digital Sales privileges that are assigned to all sales job roles.

If you created custom versions of these roles, review this information to make sure users who are assigned the custom roles have all the Digital Sales privileges they need.

> **Note:** Only the Digital Sales-specific privileges are shown for each of the job roles listed in the tables in this topic. Each role is assigned other privileges that provide access to CX Sales and Fusion Service functionality.

Function Security Policies

These are the function security policies for Digital Sales features and the sales job roles they're assigned to.

Function Security Policy Name (Code)	Function Security Policy Description	Assigned to Role
Access Feed View (ORA_ZCA_ACCESS_VIEW_FEEDS_PRIV)	Allows access to view feeds.	Sales VP Sales Administrator
Access Partner Media Toolbar (SVC_ACCESS_PARTNER_MEDIA_TOOLBAR_PRIV)	Allows access to the partner media toolbar.	Sales VP Sales Administrator
Access View Feed Configurations (ORA_ZCA_ACCESS_VIEW_FEED_CONFIGURATIONS_PRIV)	Allows access to view feed configurations.	Sales Administrator
Create Digital Sales Account (ZCM_CREATE_DIGITAL_SALES_ACCOUNT_PRIV)	Allows creating Digital Sales account.	Sales Administrator Sales VP

Function Security Policy Name (Code)	Function Security Policy Description	Assigned to Role
Create Digital Sales Activity Appointment (ZMM_CREATE_DIGITAL_SALES_ACTIVITY_APPOINTMENT_PRIV)	Allows creating Digital Sales activity appointment.	Sales Administrator Sales VP
Create Digital Sales Activity Task (ZMM_CREATE_DIGITAL_SALES_ACTIVITY_TASK_PRIV)	Allows creating Digital Sales activity task.	Sales Administrator Sales VP
Create Digital Sales Contact (ZCM_CREATE_DIGITAL_SALES_CONTACT_PRIV)	Allows creating Digital Sales contact.	Sales Administrator Sales VP
Create Digital Sales Opportunity (MOO_CREATE_DIGITAL_SALES_OPPORTUNITY_PRIV)	Allows creating of Digital Sales opportunity.	Sales Administrator Sales VP
Create Sales Contests (ZCA_CREATE_SALES_CONTESTS_PRIV)	Allows creating sales contests.	Sales VP Sales Administrator
Create Sales Goals (ZCA_CREATE_SALES_GOALS_PRIV)	Allows creating sales goals.	Sales VP Sales Administrator
Create Sales Lead Digital Sales (MKL_CREATE_SALES_LEAD_DIGITAL_SALES_PRIV)	Allows creating sales leads for Digital Sales.	Sales Administrator Sales VP
Create Sales KPI (ZCA_CREATE_SALES_KPI_PRIV)	Allows creating sales KPI.	Sales Administrator
Create Sales Orchestration (ZCA_CREATE_SALES_ORCHESTRATION_PRIV)	Allows creating a new Sales Orchestration.	Sales Administrator
Delete Sales Contests (ZCA_DELETE_SALES_CONTESTS_PRIV)	Allows deleting sales contests.	Sales VP Sales Administrator
Delete Sales Goals (ZCA_DELETE_SALES_GOALS_PRIV)	Allows deleting sales goals.	Sales VP Sales Administrator
Delete Sales KPI (ZCA_DELETE_SALES_KPI_PRIV)	Allows deleting sales KPI.	Sales Administrator
Delete Sales Orchestration (ZCA_DELETE_SALES_ORCHESTRATION_PRIV)	Allows deleting a Sales Orchestration.	Sales Administrator
Manage Application Metrics (ORA_ZCA_MANAGE_APPLICATION_METRICS_PRIV)	Allows read, create and update of recent items information.	Sales Administrator

Function Security Policy Name (Code)	Function Security Policy Description	Assigned to Role
Manage Communication Details (ORA_ZCA_INSIDE_SALES_COMMUNICATION_MGMT_PRIV)	Allows managing communication details such as create and manage call scripts, email templates.	Sales Administrator
Manage Data Visualization Configuration (ZCA_MANAGE_DATA_VISUALIZATION_CONFIGURATION_PRIV)	Allows creation, modification and deletion of data visualization configurations, either through UI pages or through REST service calls. For example, a data visualization could be configured to be displayed as a bar chart.	Sales Administrator
Manage Data Visualization Preference (ZCA_MANAGE_DATA_VISUALIZATION_PREFERENCE_PRIV)	Allows creation, modification and deletion of the user preferences for the data visualization configuration. For example, a user might prefer to view a data visualization configured initially as a horizontal bar chart to be displayed as a vertical bar chart instead.	Sales Administrator Sales VP
Manage Feed Configurations (ORA_ZCA_MANAGE_FEED_CONFIGURATIONS_PRIV)	Allows create, delete and update of feed configurations.	Sales Administrator
Manage Omnichannel Presence and Availability (SVC_MANAGE_OMNICHANNEL_PRESENCE_AND_AVAILABILITY_PRIV)	Allows management of the omnichannel availability for new work, presence menu, and indicator.	Sales VP
Run Sales Orchestration Scheduled Jobs (ZCA_RUN_SALES_ORCHESTRATION_SCHEDULER_PRIV)	Allows running, scheduling and monitoring Sales Orchestration related scheduled jobs.	Sales Administrator
Update Sales Contests (ZCA_UPDATE_SALES_CONTESTS_PRIV)	Allows updating sales contests.	Sales VP Sales Administrator
Update Sales Goals (ZCA_UPDATE_SALES_GOALS_PRIV)	Allows updating sales goals.	Sales VP Sales Administrator
Update Sales KPI (ZCA_UPDATE_SALES_KPI_PRIV)	Allows updating sales KPI.	Sales Administrator
Update Sales Orchestration (ZCA_UPDATE_SALES_ORCHESTRATION_PRIV)	Allows updating an existing Sales Orchestration.	Sales Administrator
View Account from Digital Sales (ZCM_VIEW_DIGITAL_SALES_ACCOUNT_PRIV)	Allows viewing of account from Digital Sales.	Sales Administrator Sales VP
View Activity from Digital Sales (ZMM_VIEW_DIGITAL_SALES_ACTIVITY_PRIV)	Allows viewing of activity from Digital Sales.	Sales Administrator Sales VP
View Contact from Digital Sales (ZCM_VIEW_DIGITAL_SALES_CONTACT_PRIV)	Allows viewing of contact from Digital Sales.	Sales Administrator Sales VP

Function Security Policy Name (Code)	Function Security Policy Description	Assigned to Role
View Communication Details (ORA_ZCA_INSIDE_SALES_COMMUNICATION_PRIV)	Allows viewing communication details such as email status, call scripts.	Sales Administrator
View Data Visualization Configuration (ZCA_VIEW_DATA_VISUALIZATION_CONFIGURATION_PRIV)	Allows viewing of data visualization configurations.	Sales Administrator Sales VP
View Digital Sales (ZCA_VIEW_DIGITAL_SALES_PRIV)	Allows viewing of the Digital Sales application.	Sales VP Sales Administrator
View My Day (ZBS_VIEW_MY_DAY_PRIV)	Allows viewing of various record types within a single page.	Sales VP Sales Administrator
View Navigator Menu (ORA_ZCA_VIEW_NAVIGATOR_MENU_PRIV)	Allows viewing navigator metadata information.	Sales VP Sales Administrator
View Opportunity from Digital Sales (MOO_VIEW_DIGITAL_SALES_OPPORTUNITY_PRIV)	Allows viewing of opportunity from Digital Sales.	Sales Administrator Sales VP
View Quotes and Quote Lines in Digital Sales (ZCA_VIEW_DIGITAL_SALES_QUOTES_PRIV)	Allows viewing of quotes and quote lines in Digital Sales.	Sales Administrator Sales VP
View Sales Contests (ZCA_VIEW_SALES_CONTESTS_PRIV)	Allows viewing sales contests.	Sales VP Sales Administrator
View Sales Goals (ZCA_VIEW_SALES_GOALS_PRIV)	Allows viewing sales goals.	Sales VP Sales Administrator
View Sales KPI (ZCA_VIEW_SALES_KPI_PRIV)	Allows viewing sales KPI.	Sales VP Sales Administrator
View Sales Lead from Digital Sales (MKL_VIEW_DIGITAL_SALES_SALES_LEAD_PRIV)	Allows viewing of sales lead from Digital Sales.	Sales Administrator Sales VP
View Sales Orchestration (ZCA_VIEW_SALES_ORCHESTRATION_PRIV)	Allows viewing the list of Sales Orchestrations or a particular Sales Orchestration.	Sales Administrator Sales VP
View Smart Actions (ZCA_VIEW_SMART_ACTIONS_PRIV)	Allows read and view access to Smart Actions Framework data.	Sales VP Sales Administrator

Function Security Policy Name (Code)	Function Security Policy Description	Assigned to Role
View Text Analysis Intelligence (ZCA_VIEW_INTERACTION_EVENT_TEXT_ANALYSIS_PRIV)	Allows user to view intelligence derived from text analysis.	Sales VP Sales Administrator
View Web Activity (ZCA_VIEW_WEB_ACTIVITY_PRIV)	Allows viewing web activities synchronized from B2B Marketing.	Sales Administrator Sales VP

When you're providing your users with access to Digital Sales functionality, here are a few things to be aware of:

- If you want sales administrators to create and manages rollups, assign the Manage Rollup Metrics privilege to a custom sales administrator job role, then assign the role to relevant users. The Manage Rollup Metrics privilege isn't assigned to the predefined job roles by default. For additional information see the Rollups chapter in this guide.
- Administrators must be assigned the Manage Signal Definitions privilege as well as the KPI privileges to create and manage custom KPIs. The Sales Administrator job role is assigned all these privileges by default.

Data Security Policies

These are the data security policies for Digital Sales objects and the job roles they're assigned to.

Data Security Policy Name	Data Resource	Condition	Permission	Assigned to Role
Grant on Sales Contests	Sales Contests	Access the sales contests for table ZCA_CONTESTS where user is participant of contest	Read; View Sales Contest	Sales VP
Grant on Sales Contests	Sales Contests	Access the sales contests for table ZCA_CONTESTS where user is owner or creator of contest	Read; View Sales Contest Update Sales Contest Delete Sales Contest	Sales VP
Grant on Sales Contests	Sales Contests	Access the sales contests for table ZCA_CONTESTS where their subordinate is a participant of contest	Read; View Sales Contest	Sales VP
Grant on Sales Contests	Sales Contests	All values	Read; View Sales Contest Update Sales Contest Delete Sales Contest	Sales Administrator
Grant on Sales Goals	Sales Goals	Access the sales goals for table ZCA_GOALS where user is participant of goal	Read; View Sales Goal	Sales VP

Data Security Policy Name	Data Resource	Condition	Permission	Assigned to Role
Grant on Sales Goals	Sales Goals	Access the sales goals for table ZCA_GOALS where user is owner or creator of goal	Read; View Sales Goal Update Sales Goal Delete Sales Goal	Sales VP
Grant on Sales Goals	Sales Goals	Access the sales goals for table ZCA_GOALS where their subordinate is a participant of goal	Read; View Sales Goal Update Sales Goal	Sales VP
Grant on Sales Goals	Sales Goals	All values	Read; View Sales Goal Update Sales Goal Delete Sales Goal	Sales Administrator
Grant on Sales Goal Participants	Sales Goal Participants	Access the sales goal participants for table ZCA_GOAL_PARTICIPANTS where user is participant of goal	Read; View Sales Goal Participants	Sales VP
Grant on Sales Goal Participants	Sales Goal Participants	Access the sales goal participants for table ZCA_GOAL_PARTICIPANTS where user is owner or creator of goal	Read; View Sales Goal Participants Update Sales Goal Participants Delete Sales Goal Participants	Sales VP
Grant on Sales Goal Participants	Sales Goal Participants	Access the sales goal participants for table ZCA_GOAL_PARTICIPANTS where their subordinate is a participant of goal	Read; View Sales Goal Participants Update Sales Goal Participants Delete Sales Goal Participants	Sales VP
Grant on Sales Goal Participants	Sales Goal Participants	All values	View Sales Goal Participants Update Sales Goal Participants Delete Sales Goal Participants	Sales Administrator
Grant on Sales KPI	Sales KPI	All values	View Sales KPI	Sales Administrator Sales VP
Grant on Sales KPI	Sales KPI	All values	Delete Sales KPI	Sales Administrator

Data Security Policy Name	Data Resource	Condition	Permission	Assigned to Role
			Update Sales KPI Update Sales KPI Restricted	

11 Get Ready to Create Sales Users

What You Need to Understand Before Creating Sales Users

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.

Creating sales users creates rudimentary Human Resources records, even if you aren't implementing HCM. Before you create sales users, you must create the elements of the resource hierarchy they are 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.

Sales Resource Hierarchy

The sales resource hierarchy shows up as the org chart in the Resource Directory. But the hierarchy is more than a pretty picture. It determines who can see what sales information and 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. Oracle supports matrix management, so the resource hierarchy you build doesn't have to match the formal reporting hierarchy in the Oracle Global Human Resources Cloud or other Human Resources applications.

To give you an idea of what a sales resource hierarchy looks like, here's a screenshot of a portion of Vision Corp.'s Resource Directory. Aside from their names, all users in the hierarchy must have:

- A resource role (highlighted by callout 1)

  The resource role describes the role that each resource plays in the organization. It displays right underneath the user name in the Resource Directory available in the CX Sales UI and elsewhere. Resource roles are also used as the primary condition in the role-provisioning rules. You can create resource roles either in Setup Assistant or manually, using the setup task Manage Resource Roles.

- A resource organization (callout 2)

  You must create a resource organization for every manager. Each individual contributor who isn't a manager automatically inherits the manager's organization. The name of the resource organization need not be any formal department name, but you should avoid using manager names to accommodate hierarchy changes. You

can create resource organizations as you are create users in the UI, or you can create them when you import users using the Excel import macro.



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.

Sales Resource Roles Provided by Oracle

Oracle provides you with these standard resource roles and the appropriate job roles for each:

- Channel Account Manager
- Channel Operations Manager
- Channel Sales Manager

- Chief Executive Officer
- Contract Administrator
- Contract Manager
- Customer Data Steward
- Data Steward Manager
- Partner Administrator
- Partner Sales Manager
- Partner Salesperson
- Sales Administrator
- Sales Lead Qualifier
- Sales Manager
- Salesperson
- Sales Restricted User
- Sales Setup User
- Sales Vice President

Except for the Chief Executive Officer and the Salesperson, there's a corresponding job role with the same name for each of the resource roles provided by Oracle. The job role corresponding to the Salesperson resource role is Sales Representative. The Chief Executive Officer is usually assigned the Sales Vice President job role.

Role-Provisioning Rules Setup Assistant Creates Automatically

If you used Setup Assistant, you're in luck. Setup Assistant automatically creates the role-provisioning rules for users with all the standard sales resource roles. The rules provision user 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 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.

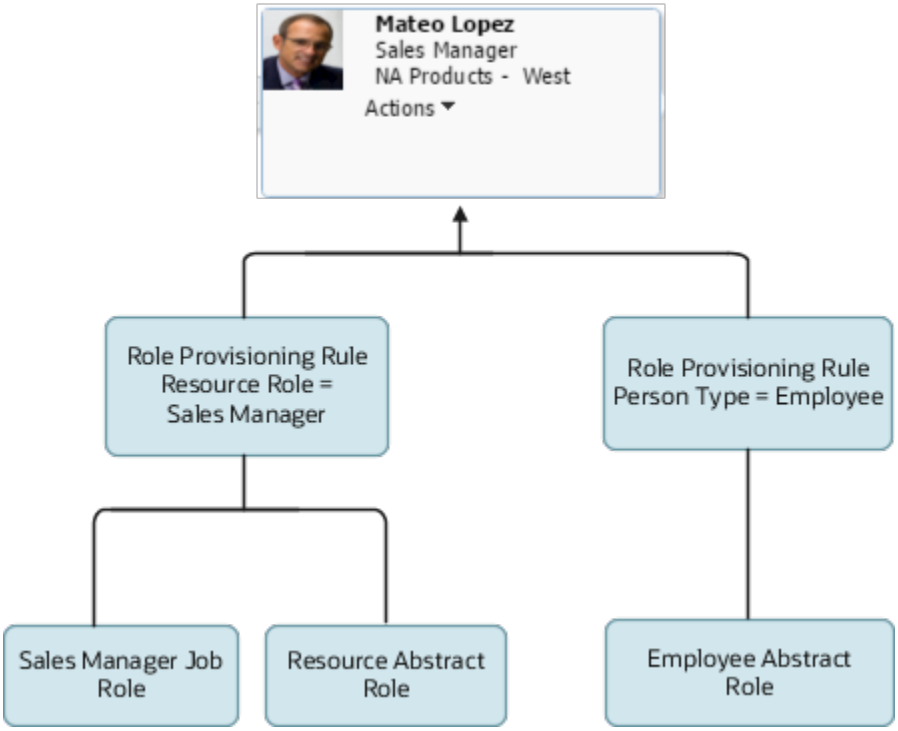
Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned	UI Access
Channel Account Manager	HR Assignment Status is Active Resource Role is Channel Account Manager	Channel Account Manager Resource	CX Sales UIs
Channel Sales Manager	HR Assignment Status is Active Resource Role is Channel Sales Manager	Channel Sales Manager Resource	CX Sales UIs
Channel Operations Manager	HR Assignment Status is Active	Channel Operations Manager	CX Sales UIs

Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned	UI Access
	Resource Role is Channel Operations Manager	Resource	
Chief Executive Officer	HR Assignment Status is Active Resource Role is Chief Executive Officer	Sales VP Resource	CX Sales UIs
Contract Administrator	HR Assignment Status is Active Resource Role is Contract Administrator	Contract Administrator Resource	CX Sales UIs
Contract Manager	HR Assignment Status is Active Resource Role is Contract Manager	Contract Manager Resource	CX Sales UIs
Customer Data Steward	HR Assignment Status is Active Resource Role is Customer Data Steward	Customer Data Steward Resource	CX Sales UIs
Data Steward Manager	HR Assignment Status is Active Resource Role is Data Steward Manager	Data Steward Manager Resource	CX Sales UIs
Partner Administrator	Resource Role is Partner Administrator	Partner Administrator	CX Sales UIs
Partner Sales Manager	Resource Role is Partner Sales Manager	Partner Sales Manager	CX Sales UIs
Partner Sales Representative	Resource Role is Partner Salesperson	Partner Sales Representative	CX Sales UIs
Sales Administrator	HR Assignment Status is Active Resource Role is Sales Administrator	Sales Administrator Resource	Both CX Sales and Digital Sales UIs
Sales Lead Qualifier	HR Assignment Status is Active Resource Role is Sales Lead Qualifier	Sales Lead Qualifier Resource	CX Sales UIs
Sales Manager	HR Assignment Status is Active Resource Role is Sales Manager	Sales Manager Resource	Both CX Sales and Digital Sales UIs

Provisioning Rule Name	Condition	Job or Abstract Roles Provisioned	UI Access
Sales Representative	HR Assignment Status is Active Resource Role is Salesperson	Sales Representative Resource	Both CX Sales and Digital Sales UIs
Sales Restricted User	HR Assignment Status is Active Resource Role is Sales Restricted User	Sales Restricted User Resource	CX Sales 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 Digital Sales UIs
Sales Vice President	HR Assignment Status is Active Resource Role is Sales Vice President	Sales VP Resource	Both CX Sales and Digital Sales UIs
Contingent Worker	HR Assignment Status is Active System Person Type is Contingent Worker	Contingent Worker	CX Sales
Employee	HR Assignment Status is Active System Person Type is Employee	Employee	Not applicable.

You create sales users as employees. So, two role-provisioning rules come into play: the rule triggered by the users' resource roles and the rule triggered by the fact that they are 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.

Here's a diagram that shows the two rules that are triggered when you create an employee resource with the Sales Manager resource role.



Resource Roles That Provide Access to Digital Sales UIs

When you assign these four resource roles to resources, the role provisioning-rules created automatically by the Setup Assistant provide access to both the Digital Sales and CX Sales UIs.

- Sales Representative
- Sales Manager
- Sales VP
- Sales Administrator

When You Need Additional Resource Roles and Role-Provisioning Rules

You may need to create additional resource roles either by entering them in the Setup Assistant, or using the Manage Resource Roles task for any of these reasons:

- 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 her 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 is 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.

Each time 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.

For information on how to change the resource role for a user and make other organizational changes, 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.

How 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.

> **Note:** If you're implementing sales on top of an existing HCM application, salespeople are already 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. *How do I make an employee a sales resource?*

What Setup Assistant Does for You	What You May Need to Do Manually
Creates additional resource roles. All you do is enter their names.	After you run Setup Assistant, you can create additional resource roles manually in Setup and Maintenance, using the Manage Resource Roles task: • Offering: Sales • Functional Area: Users and Security • Task: Manage Resource Roles
Creates the role-provisioning rules for the standard resource roles provided by Oracle and for the additional resource roles that you created in Setup Assistant.	You can also create additional provisioning rules for any resource roles you create outside Setup Assistant in Setup and Maintenance, using the task Manage HCM Role Provisioning Rules: • Offering: Sales • Functional Area: Users and Security • Task: Manage HCM Role Provisioning Rules
Sets the resource organization that you entered for the CEO as the top of the resource organization hierarchy.	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: • Offering: Sales

What Setup Assistant Does for You	What You May Need to Do Manually
Setup Assistant eliminates two manual steps: creating the resource organization and then using the Manage Resource Organization Hierarchies task to specify that resource organization as the top of the Internal Resource Organization Hierarchy.	• Functional Area: Users and Security • Task: Manage Internal Resource Organizations
Prevents you from accidentally entering duplicate email addresses for users by setting the system profile Enable Validation of User Work Email.	Nothing.

Related Topics

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

Overview of Setup Before You Create Sales Users

Because the Setup Assistant does most of the required prep work for you, only the first setup step listed here is required for users who will access Digital Sales UIs. It's also recommended that you provision all your users with a custom version of the Employee abstract role (step 2). Optionally, you can create additional resource roles and provisioning rules outside the Setup Assistant.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Digital Sales and CX Sales	Create a custom version of the Employee abstract role and provision the custom role to your employees to avoid unnecessary licensing charges.	Various	See all the topics in the section: *How to Configure the Employee Abstract Role for Sales Users*
2	Both Digital Sales and CX Sales	If you don't want to run Setup Assistant again, you can create additional resource roles manually using the Manage Resource Roles task.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Resource Roles**	See the topic: *Create Additional Resource Roles*
3	Both Digital Sales and CX Sales	Create provisioning rules for any resource roles that you created outside Setup Assistant, by using the	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage HCM Role Provisioning Rules**	See the topic: *Create Role-Provisioning Rules for the Additional Resource Roles*.

Step	Applies To	Description	Navigation	Where to Get More Details
		task Manage HCM Role Provisioning Rules.		

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.

Create Additional Resource Roles

Use these steps to review the resource roles provided by Oracle and to create any additional resource roles you need. Remember that the resource role is only a title. So, if you create a resource role, you must also create the provisioning rule to go with it.

1. Open the task **Manage Resource Roles** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Users and Security
    - Task: Manage Resource Roles
2. To review all the existing resource roles, click **Search** without entering any search criteria.

    All the available resource roles are listed. Roles that are predefined by Oracle are labeled **System**.
3. Here's how to create a resource role:
    a. Click **Create**.
    b. In the **Role Name** field, enter the name of the resource role as you want it to appear in the application UI, for example, `Inside Sales`.
    c. In the **Role Code** field, enter a unique internal name in capital letters. No spaces are permitted, but you can use the underscore character (_) instead. For example, enter `INSIDE_SALES`.
    d. If the resource role belongs to a manager, select the **Manager** option. If the resource role belongs to an individual contributor, such as an inside sales representative, then select the **Member** option.
    e. From the **Role Type** list, select **Sales** to classify the role that you are creating.
4. Click **Save and Close**.

Related Topics

- How do I make an employee a sales resource?

Create Role-Provisioning Rules for the Additional Resource Roles

Create the rules that provision the required security permissions for any new resource roles that you created outside the Setup Assistant. For all internal sales users, including sales administrators, you must add the Resource abstract role in

addition to the required job roles. The Resource abstract role permits the users to access the Resource Directory. Don't add the Resource abstract role for partner roles.

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Users and Security
    - Task: Manage HCM Role Provisioning Rules
2. On the Manage Role Mappings page, click **Create**.
3. On the Create Role Mapping page, **Mapping Name** field, enter a name that helps you identify the mapping.
4. In the Conditions section, enter these conditions:

Field	Entry
Resource Role	Select the resource role that you want to provision.
HR Assignment Status	Select **Active**. This additional condition ensures that the provisioned roles are automatically removed if the user is terminated in Global Human Resources.

5. In the Associated Roles region, click **Add** to add the job roles you want to provision.
6. For all internal sales users, add the **Resource** abstract role. Don't add this role for partner roles.
7. Make sure that the **Autoprovision** option is selected for all the roles.
8. Click **Save and Close**.

How to Configure the Employee Abstract Role for Sales Users

The Employee abstract role is assigned to all sales users who are employees but many of the privileges it provides aren't required if you've implemented only CX Sales.

Although these privileges aren't used, they can incur licensing charges. For this reason, Oracle recommends that you create a custom version of the Employee role that doesn't include these unnecessary privileges and provision the custom role to your sales users. This task involves these steps.

- Copy the predefined Employee role to create a custom version of the role.

  See the topic: *Create a Custom Employee Role for Sales Users*.
- Edit the custom employee role to remove unnecessary privileges.

  See the topic: *How do I remove unneeded privileges from my custom employee abstract role?*.
- Edit the predefined Employee provisioning rule so that it assigns the custom employee role instead of the predefined Employee role to all users created as employees.

  Test the changes you've made to the rule and then implement it for all your users. See the topic: *Provision the Custom Employee Role to Users*.

Create a Custom Employee Role for Sales Users

Create a custom employee abstract role that contains only the privileges sales users require using these steps.

1. Sign in to the sales application as a user who has the IT Security Manager job role.
2. Navigate to the Security Console (**Navigator** > **Tools** > **Security Console**).
3. On the Roles tab, search for and select the Employee abstract role (ORA_PER_EMPLOYEE_ABSTRACT).
4. In the search results, select **Copy Role** from the **Actions** menu of the Employee role.
5. In the Copy Options dialog box, select the **Copy top role and inherited roles** option, then click **Copy Role**.

   > **Note:** When you select the **Copy top role and inherited roles** option, you copy not only the role you've selected, but also all of the roles in its hierarchy. When inherited duty roles are copied, you can edit them without affecting other roles in the source role hierarchy.

6. On the Copy Role: Basic Information page, review and edit the **Role Name**, **Role Code**, and **Description** values, as appropriate.

   The role name and code have the default prefix and suffix for copied roles specified on the Roles subtab of the Security Console Administration tab, but you can overwrite these values for the role that you're copying. For example, you might want to name the role **Employee Custom Sales**. Any roles inherited by the copied role are unaffected by any name changes that you make here.

7. Click **Next**.
8. Click the Summary train stop.
9. On the Summary page, click **Submit and Close**, then click **OK** to close the confirmation message.
10. Review the progress of your role copy operation on the Role Copy Status subtab of the Security Console Administration tab. Once the status is **Complete**, you can edit the copied role.

How do I remove unneeded privileges from my custom employee abstract role?

By default, some privileges are assigned to the Employee abstract role that aren't used by Sales users. You can delete these privileges from the custom employee role you previously created.

To delete privileges that are assigned directly to the custom employee role, edit the custom employee role you created. If a privilege is inherited from a duty in the custom employee role hierarchy, you've to edit the custom duty role to remove the privilege.

1. On the Roles tab of the Security Console, search for and select the custom employee role you've just created, for example, **Employee Custom Sales**.
2. In the search results, select the **Edit Role** option from the **Actions** menu of the Employee Custom Sales role.
3. Click **Next**.

   On the Edit Role: Function Security Policies page, all the privileges assigned directly to the Employee Custom Sales role are listed.

4. To display the privileges the custom employee role inherits from duty roles in its hierarchy, scroll to the end of the page, then click **Load Inherited Policies**.

   All the privileges the custom employee role has are now listed:
   - If the **Inherited from Role** column is blank for a privilege, the privilege is assigned directly to the employee custom role and can be deleted on this page.
   - If the **Inherited from Role** column isn't blank, you have to edit the custom duty role listed to delete a privilege from it.

5. Delete the privileges that are assigned directly to the Employee Custom Sales role that aren't required for sales users.
   a. Delete the following privileges by selecting each privilege in turn, then clicking **Delete**.
      - Manage Reputation Scores (HWR_REPUTATION_EE_PRIV)
      - Manage Social Roles (HWR_SOCIAL_ROLES_EE_PRIV)
   b. Click **Yes** in the Warning dialog box to confirm the deletion.
   c. Click the Summary train stop.
   d. On the Edit Role: Summary page, verify both privileges you deleted are listed as Removed in the Function Security Policies row, click **Save and Close**, then click **OK**.

6. Now delete the excess privileges that are inherited by the Employee Custom Sales role from duty roles in its hierarchy.
   a. On the Roles tab of the Security Console, edit each duty role shown in the table and remove the privilege listed.

      > **Note:** The default prefix and suffix for copied roles is specified on the Roles subtab of the Security Console Administration tab. By default, the role-name suffix is Custom but this might differ in your environment.

Privilege to Remove	Custom Duty Role to Edit
Manage Expense Report	Expense Entry Custom
Create Performance Document by Worker	Performance Management Worker Custom
Provide Performance Evaluation Feedback	Performance Management Worker Custom
View Performance Information on Worker Dashboard	Performance Management Worker Custom
Access Time Work Area	Time and Labor Worker Custom
Manage Requisition	Requisition Self Service User Custom
Access Learning Common Components	Access Learning Common Components Custom

   b. Once you've deleted each privilege, review your changes to the custom duty role on the Edit Role Summary page and save them.

7. Finally, edit the Employee Custom Sales role on the Security Console.

   Navigate to the Function Security Policies page and verify that all the excess privileges, both those assigned directly to the role and those inherited from other roles in the hierarchy, have been removed.

Provision the Custom Employee Role to Users

Modify the predefined provisioning rule for the Employee abstract role so that it assigns users the custom employee role you created instead of the predefined Employee role. Test your configuration for an individual user, then apply the change to all users.

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Users and Security
    - Task: Manage HCM Role Provisioning Rules
2. On the Role Mappings page, enter **Employee** in the **Mapping Name** field, then click **Search**.
3. In the Search Results area, click the **Employee** mapping.
4. On the Edit Role Mapping: Employee page, make the following change in the Associated Roles region:
    a. Select the Employee row, then click the Remove icon to remove the predefined Employee role.
    b. Click the Add Row icon to add a new row.
    c. In the **Role Name** field, search for your custom employee abstract role, for example, **Employee Custom Sales**, then add the role.
    d. Select the **Autoprovision** option for the role.
    e. Click **Save and Close**, then click **OK**.
5. Click **Done** on the Role Mappings page.
6. Test that the role provisioning rule updates are working correctly for a single employee user:
    a. Open the Search Person page (**Navigator** > **My Team** > **Users and Roles**).
    b. Search for and select a user who was created as an employee person type.

       The Edit User page for the user opens.
    c. In the Roles region, click **Autoprovision Roles**. Any roles for which the user qualifies automatically appear in the Role Requests table with the status **Add Requested**. Your custom employee role, Employee Custom Sales, should be listed.

       > **Note:** If the Employee role was initially provisioned to a user manually rather than through automatic role provisioning, the change to the provisioning rule won't remove the original Employee role from the user.

    d. Click **Save and Close**.
7. Now navigate to the Scheduled Processes work area (**Navigator** > **Tools** > **Scheduled Processes**) and run the **Autoprovision Roles for All Users** process.

   This process compares all current user role assignments with all current role mappings and creates appropriate autoprovisioning requests. The process can take some time to complete depending on the number of users impacted.

12 Create Sales Users in the UI

Setup Overview

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 and skip this chapter. However, you may 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.

Here are the steps for creating sales users in the UI.

> **Note:** If you're implementing sales on top of an existing HCM application, salespeople are already 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. *How do I make an employee a sales resource?*

Step	Description	Navigation	Where to Get More Details
1	Before you create users, review your user notifications and preferences setup. You don't want to accidentally spam anyone.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Applications Security Preferences**	See: *Overview of User Account Preferences Setup*
2	Create the users. Work your way down the hierarchy because you must select the manager for every user you create. When you create a manager user, you must also create his or her resource organization. Users who aren't managers inherit the resource organization of their managers.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Users**	See the topic: *Create Sales Users in the UI*
3	If you're using some of these users for testing your setups, then you must manually reset their passwords in the Security Console. Make sure that you have turned off notifications for password resets, unless you want the user to be notified that you manually reset the password.	**Setup and Maintenance** > **Sales** > **Users and Security** > **Manage Applications Security Preferences**	See: *Overview of User Account Preferences Setup*

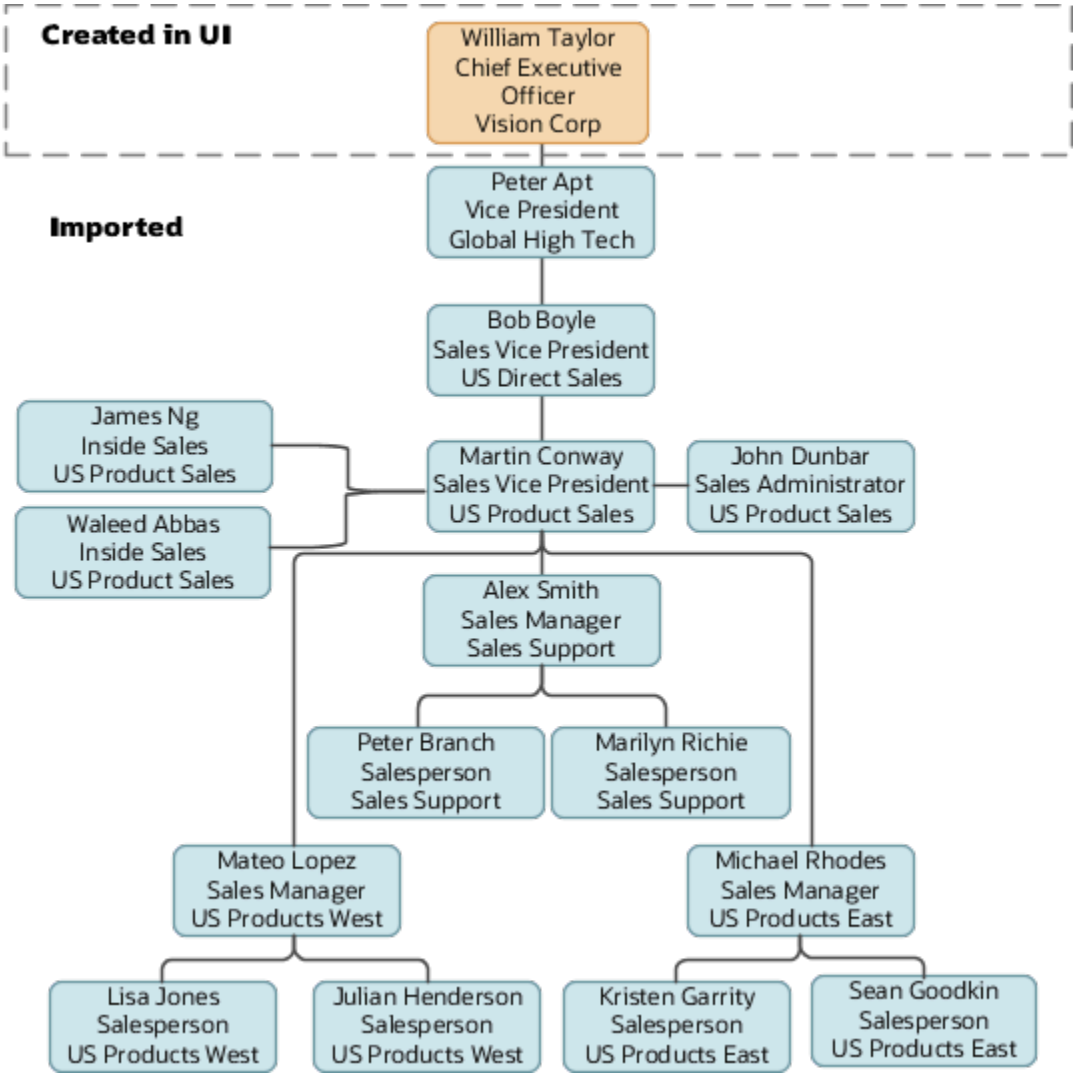
After creating the first few users in the top of your hierarchy, import the rest as described in the next chapter.

Related Topics

Example of a Sales Resource Hierarchy

Here's an example of the sales resource hierarchy created by the fictitious Vision Corp. The company limits its pilot implementation to the US sales organization, but starts the hierarchy at the very top, with the Chief Executive Officer.

Starting with the CEO makes it easy to add other branches of the organization in the future. You create the first user at the top of the hierarchy in Setup Assistant or in the UI. You can import the rest. But creating a few users in the UI is a good way to check if the provisioning rules work correctly before you import.



Vision Corp. creates only the first user in the UI: William Taylor, Chief Executive Officer.

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 with his or her 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.

1. There are two ways to get to the UI where you create users:
    - In Setup and Maintenance, go to the following:
        - Offering: Sales
        - Functional Area: Users and Security
        - Task: Manage Users
    - In the Navigator, click **Users and Roles** under the **My Team** heading.
2. On the Search Person page, click **Create**.
3. On the Create User page, Personal Details region, enter the user's name and a unique email address.

   The application sends all notifications regarding the user account to this email address unless you turn off notifications in the Security Console work area.

   > **Tip:** If you want ensure that users are never notified by email, you can change the domain of the email addresses to any of the special discard email domains provided by Oracle. For example, you can substitute `@discard.mail.us1.cloud.oracle.com`. See the Implementation Reference guide for details.

   After you create the user, you can no longer update the email address in the Manage Users work area. You must instead update the email address on the Users tab in the Security Console work area or using Import Management.
4. 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.
5. 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.
6. 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.

7. Make these selections in the Employment Information region:

Field	What to Select
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.

8. 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**.

    d. If the user you're creating isn't a manager, then the resource organization is automatically copied from the manager.
9. Click **Autoprovision Roles**.

    The application provisions the job and abstract roles according to the role provisioning rules.

10. Click **Save and Close**.

    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.

Related Topics

- Modify the Provisioning Rules for Digital Sales

Can I change the user name after creating a user?

While both the Users tab of the Security Console and the Manage Users task permit you to change the user name, changing it isn't a good idea. 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). If you used the user name in any script, then you must update that script as well.

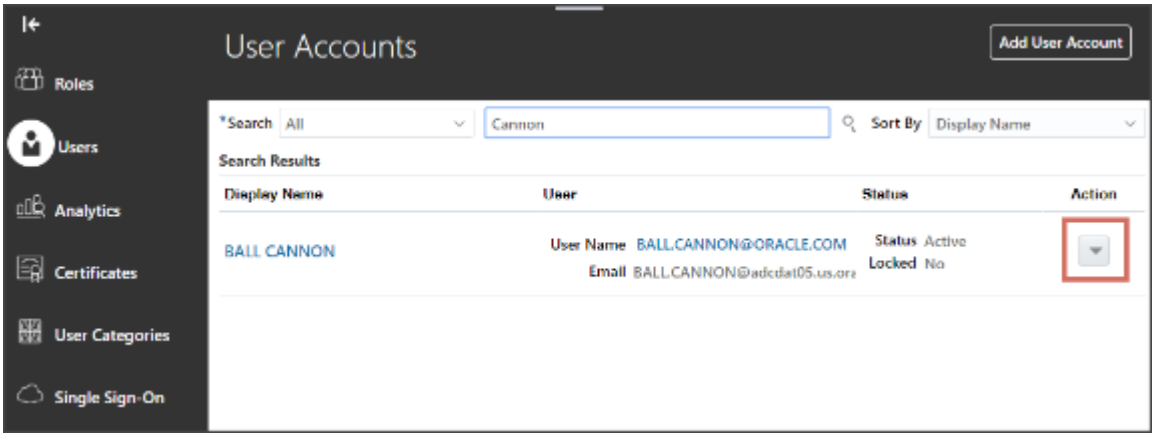
Reset Passwords for Others

Use the Security Console to reset passwords for other users. Only setup users, and other users with the IT Security Manager job role, can access the Security Console. This setup applies to both CX Sales and Digital Sales.

All users can reset their own passwords by clicking their user name or image, and selecting the **Set Preferences** link in the Settings and Actions menu. They can also reset their passwords by using **Forgot Password** on the sign-in page.

1. Open the Security Console. You have two options:
    - In Setup and Maintenance, go to the following:
        - Offering: Sales
        - Functional Area: Company Profile
        - Show: All Tasks
        - Task: Manage Applications Security Preferences
    - Click **Navigator** > **Tools** > **Security Console**.
2. You can ignore and close any warnings regarding the scheduling of the Import Users and Roles Application Security Data job.
3. Click the **Users** tab.
4. Search for the user using one of the following:
    - First or last name, but not both
    - User name

    Here's a screenshot of the Users tab highlighting the location of the Action menu.



5. From the **Action** menu, select **Reset Password**.
6. In the Reset Password page, you have two options:

- To send an email to users with a link they can use to create their own passwords, select the **Automatically generate password** option.
- Reset the password yourself:

    i. Select the **Manually change the password** option.
    ii. Enter the new password twice.

    > **Note:** The manual option is available only if you selected the **Administrator can manually reset password** option while editing the password policy for the DEFAULT user category in the Security Console.

7. Click **Reset Password**.

Related Topics

- Set Up Preferences for User Names, Passwords, and Notifications

13 Import Sales 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 the resource organizations for each manager, creates the sales resource organization hierarchy, and provisions the users with the job roles and abstract roles they need. 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.

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 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	Applies To	Description	Navigation	Where to Get More Details
1	Both Digital Sales and CX Sales	Synchronize 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*
2	Both Digital Sales and CX Sales	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*
3	Both Digital Sales and CX Sales	Here's what to enter in the macro:	None.	See the topic: *Enter Sales User Data into the Resource Import Macro and Import*

Step	Applies To	Description	Navigation	Where to Get More Details
		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.		
4	Both Digital Sales and CX Sales	After each import and whenever you update the resource hierarchy, you must run four 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*
5	Both Digital Sales and CX Sales	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*
6	Both Digital Sales and CX Sales	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	**Navigator** > **Resource Directory**	See the topic: *Review the Resource Hierarchy You Created and Upload User Images*.

Step	Applies To	Description	Navigation	Where to Get More Details
		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.		
7	Both Digital Sales and CX Sales	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. 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.	**Navigator** > **Tools** > **Scheduled Processes**	See the topic: *Run the Refresh Territories from Resources Process*

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.

Synchronize Your Sales Application 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. Open the task **Run User and Role Synchronization Process** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Users and Security
    - Task: Run User and Roles Synchronization Process
2. On the Retrieve Latest LDAP Changes page, click **Submit**.

Download the User Import Macro and Import Sales Users

Download the Macro for Importing Sales Users

Here's how to download the Microsoft Excel macro for importing users from My Oracle Support.

1. Sign in to `support.oracle.com`.
2. Search for 2229503.1.
3. Scroll down in the article to the **Details** section.
4. Download the **.Jar** file and the **Resource Import Macro** file to the same directory on your desktop.

   The application saves import logs to the same folder.

Enter Sales User 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.

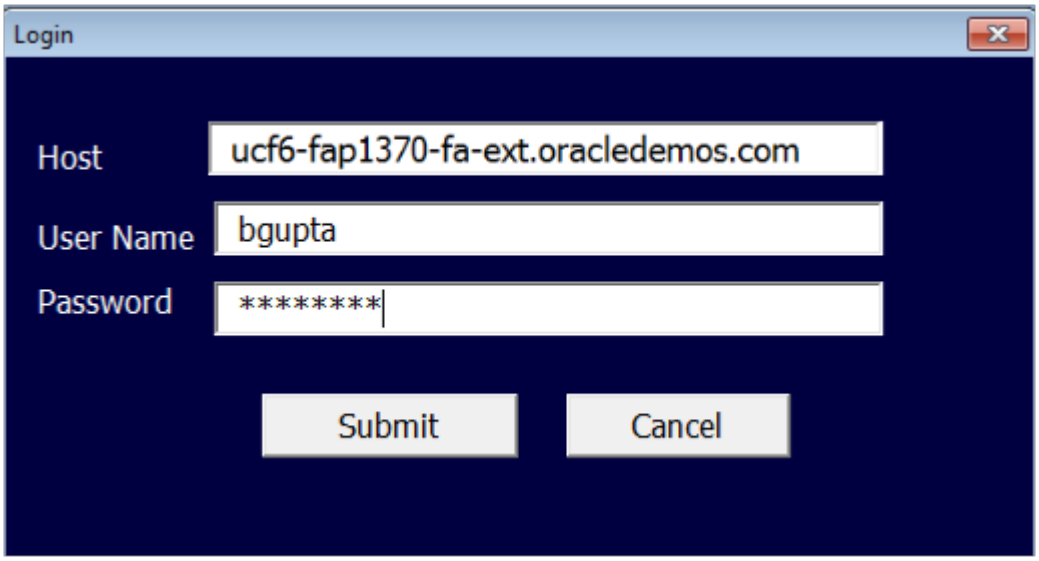
1. Confirm that you have the following information:
   - Legal entity name (usually your company name followed by **LE**)
   - Business unit name (usually your company name followed by **BU**)
   - The name of the resource organization that belongs to the resource who manages the first user or users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

Column	What to Enter
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.
`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.

Run Processes to Complete Resource and Resource Hierarchy Creation

After you import sales users, you must run four 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. At the bottom and 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 You Created and Upload 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.

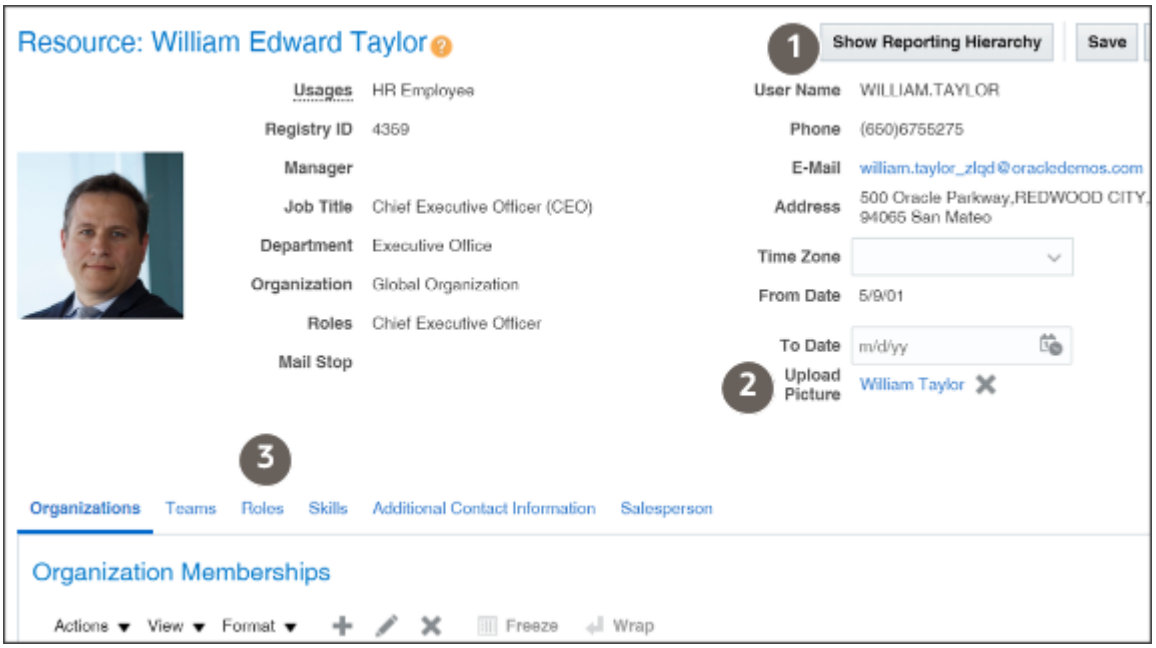
The Resource Directory is part of the HCM application, so much of the detailed information you see is only used if you implement sales together with HCM. For example, your sales application doesn't track or use resource skills and doesn't use resource teams, so you can ignore these.

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.

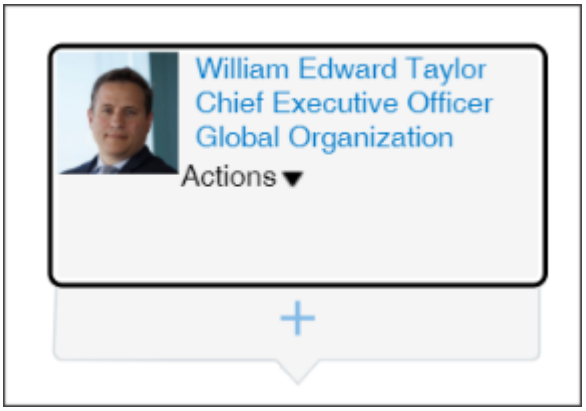
    Here's a screenshot of the Resource page showing details for the CEO. Because this screenshot was taken in an environment with both sales and human resources implemented, the page includes detail you don't see in a sales-only implementation. The Job Title, Department, and Manager fields are more important 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.

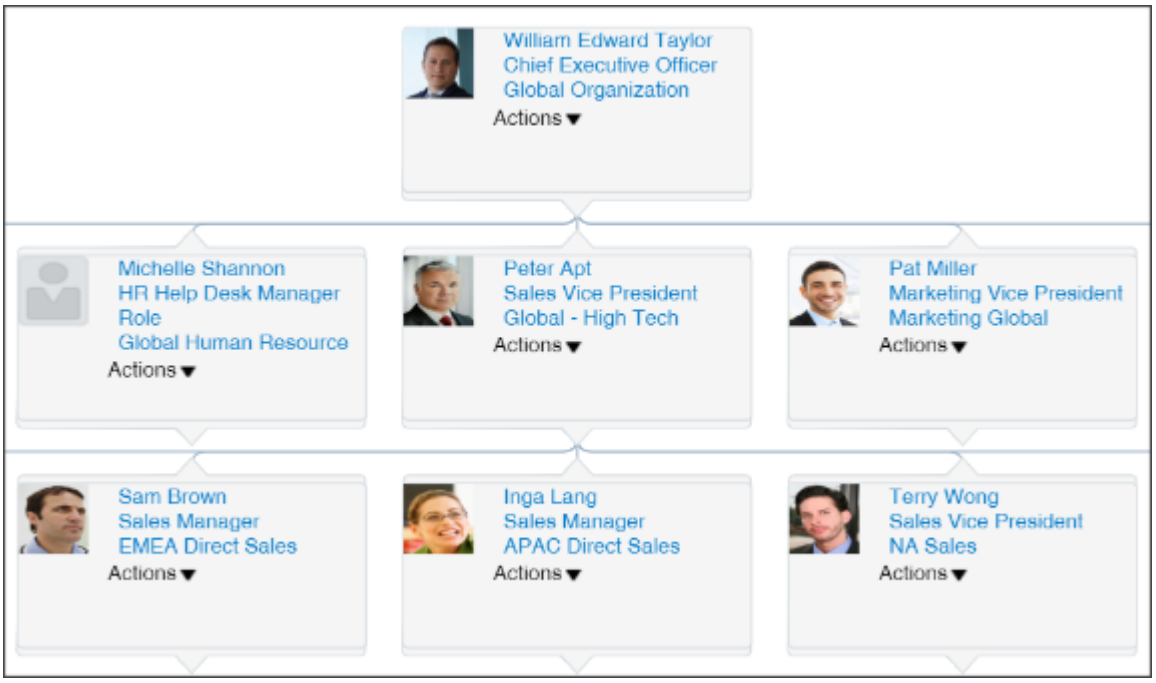


5. Click **Show Reporting Hierarchy**.

   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.

Run the Refresh Territories from Resources Process

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**.

How can I update the sales organization hierarchy?

You can use the import Excel macro to update the sales organization hierarchy, but you have to make some modifications first:

1. You must add a column to the macro for `ResourcePartyNumber`. The Resource Party Number is required to identify each resource.
2. You must export the Resource Party Number for your resources and add them to the column.

Importing your updates takes care of many steps that you would have to perform manually in the Manage Resources UI. For example, if a sales representative gets promoted to a manager, then the import completes these actions for you:

- Automatically end-dates her Sales Representative job role
- Assigns her the Sales Manager resource role
- Automatically provisions her the Sales Manager job role

The import doesn't reassign a manager's reports if the manager moves to a different organization. If you do make resource hierarchy changes and want these changes reflected immediately in your sales forecasts, you must run the Refresh Territories from Resources process.

Related Topics

- How do I export data?

How can I change the name of the top resource organization and other resource organizations?

You can change the name of the top resource organization or any other resource organization by editing the name using the Manage Internal Resource Organizations task.

1. In Setup and Maintenance, go to the **Manage Internal Resource Organizations** task:
    - Offering: Sales
    - Functional Area: Users and Security
    - Task: Manage Internal Resource Organizations
2. You can search for the organization by name, or select **Sales** as the **Usage** for your search.
3. Edit the organization name and save your changes.

14 Sales Catalog

Overview of the Sales Catalog

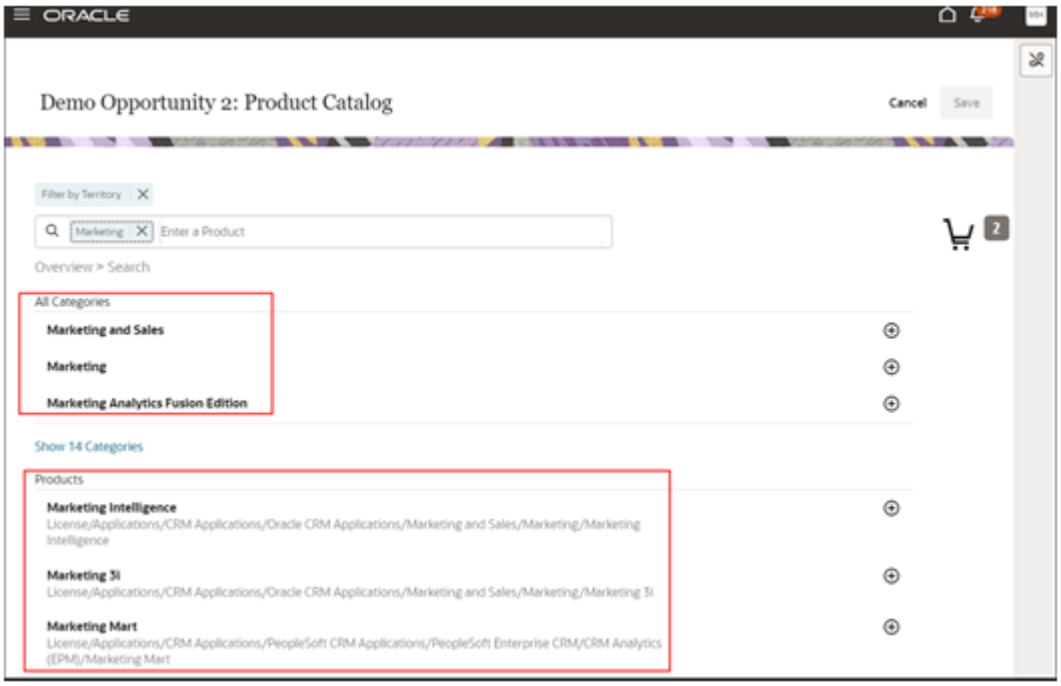
Salespeople enter the products or product groups that customers are interested in purchasing by making a selection from a sales catalog. They can either browse the catalog or start typing the product name when they make entries in opportunities and leads.

The sales catalog consists of a hierarchy of product groups. This hierarchy classifies and organizes the products in your catalog. Here are some additional key points about the catalog:

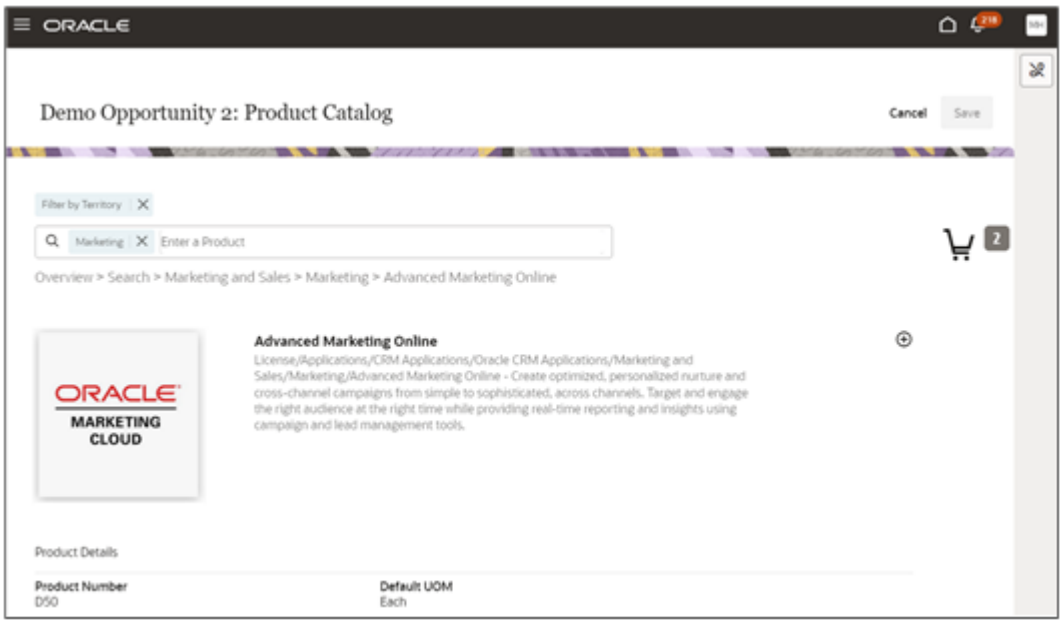
- The catalog you create has a root product group and you build your catalog underneath.
- You can include a description for each product group and product.
- You can upload one image for each product.
- There is no specific limit on the number of products you can have in a product category.
- You can use product groups as a dimension in your sales territories and for sales forecasting. During forecasting setup, you specify the number of levels in your sales catalog product group hierarchy that you want to forecast.

  For example, the fictitious Vision Corp. uses product groups to assign specialists to help close deals on opportunities. They use a line of green servers that the company has just launched. The company also creates forecasts for each server line.
- The Product Catalog page gives salespeople a simplified shopping cart experience. They can search for a product and browse the product group hierarchy to add products to a lead or opportunity. This screenshot

highlights three product groups under the All Categories section and also individual products in the Products section.



- Salespeople can drill down into the individual product pages to view the product description and an image. Here's a screenshot of the product detail page for a sample product. The page includes the product name, the product description, and an image.



Products in the Sales Catalog

While you can create the sales catalog with product groups only, you must use products to take advantage of advanced sales features, such as price books. You must also use products to enable integrations with other Oracle cloud services, including Oracle Configure, Price, and Quote (Oracle CPQ). You can also use Application Composer to add fields and perform other modifications to products, a feature not available on product groups.

The products that you create get stored both in Sales and in the Oracle Fusion Product Model. The product model serves as the master item repository for all front-office cloud services.

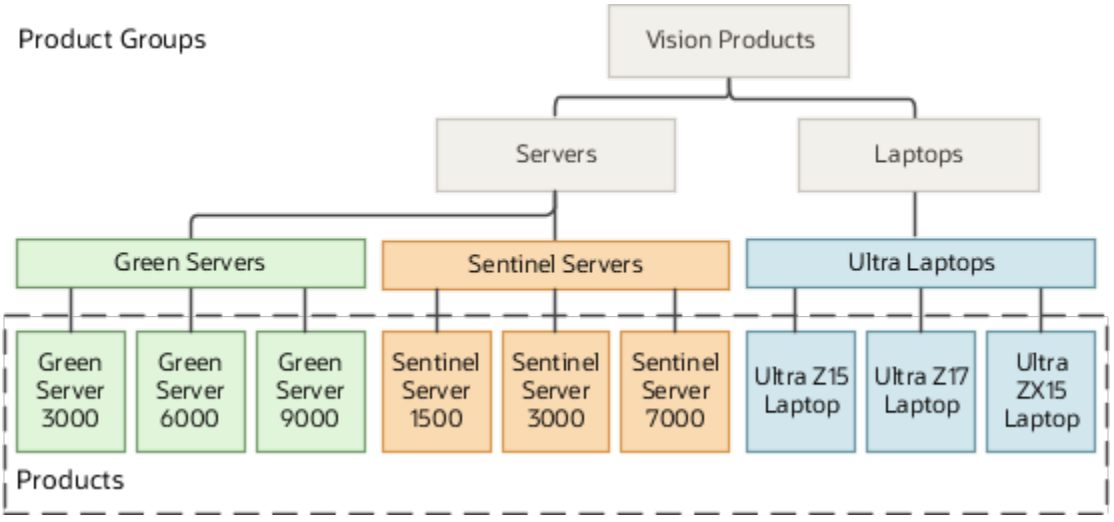
For more information on the integration with the Product Model and Oracle CPQ, see the topic *Sales and Service Catalogs* in this guide and the topic *How Sales Products and SCM Cloud Products Work Together* in the *Implementation Reference* guide.

Sample Sales Catalog Structure

Vision Corp. sells laptops and two types of servers: Green Servers and Sentinel Servers. To create the catalog, Vision Corp.:

1. Uses Vision Products as the root product group.
2. Imports the products underneath Vision Products.
3. Imports the remaining product groups and their associations with the products.

This diagram shows the configuration of the Vision Corp. sales catalog. The sales catalog consists of the root product group, Vision Products, with two child product groups representing the product types: Servers and Laptops. There are two product groups for the server families: Green Servers, and Sentinel Servers. Each server family includes three server products. The Green Server products are: Green Server 3000, Green Server 6000, and Green Server 9000. The Sentinel Server products are: Sentinel Server 1500, Sentinel Server 3000, and Sentinel Server 7000. The Ultra Laptop product group (a child of the Laptops product group) includes these products: Ultra Z15 Laptop, Ultra Z17 Laptop, and Ultra ZX15 Laptop.



Note: We highly recommend you use the Setup Assistant to set up your catalog. The Setup Assistant creates the root product group for you and performs other steps that you would otherwise need to do manually.

Sales and Service Catalogs

The building blocks of sales and service catalogs are the same. Both use product groups and products and you create them using the same UIs and import processes. You create a root product group and build your catalog underneath. Salespeople use the catalog to enter product interest in opportunities and leads. Service agents use the catalog for entering products into service requests.

There are two differences between sales and service catalogs:

- How product groups are used.

  In sales, you can forecast by product groups and use product groups for assigning opportunities. In service, you can use product groups to channel service requests to the right work queue for resolution.
- Different product options determine if the product shows up for sales or for service.

  Products must have the Eligible to Sell option selected for them to appear in the sales catalog and the Eligible for Service option selected for them to appear in the service catalog.

You can share products and product groups between the two catalogs and you can even create one catalog for both sales and service. If you do opt for a single catalog or even reuse the same product groups for the two catalogs, you must keep in mind that sales may discontinue selling some products that you may still need to service. Or sales may create product groups specific to promotions or seasonal sales.

Products in the Sales and Fusion Service Catalogs

While you can create sales and service catalogs with product groups only, you must create products to take advantage of advanced sales features such as price books. You must also use products to enable integrations with other Oracle cloud services, including Oracle Configure, Price, and Quote (CPQ) Cloud. You can also use Application Composer to add fields and perform other modifications to products, a feature not available on product groups.

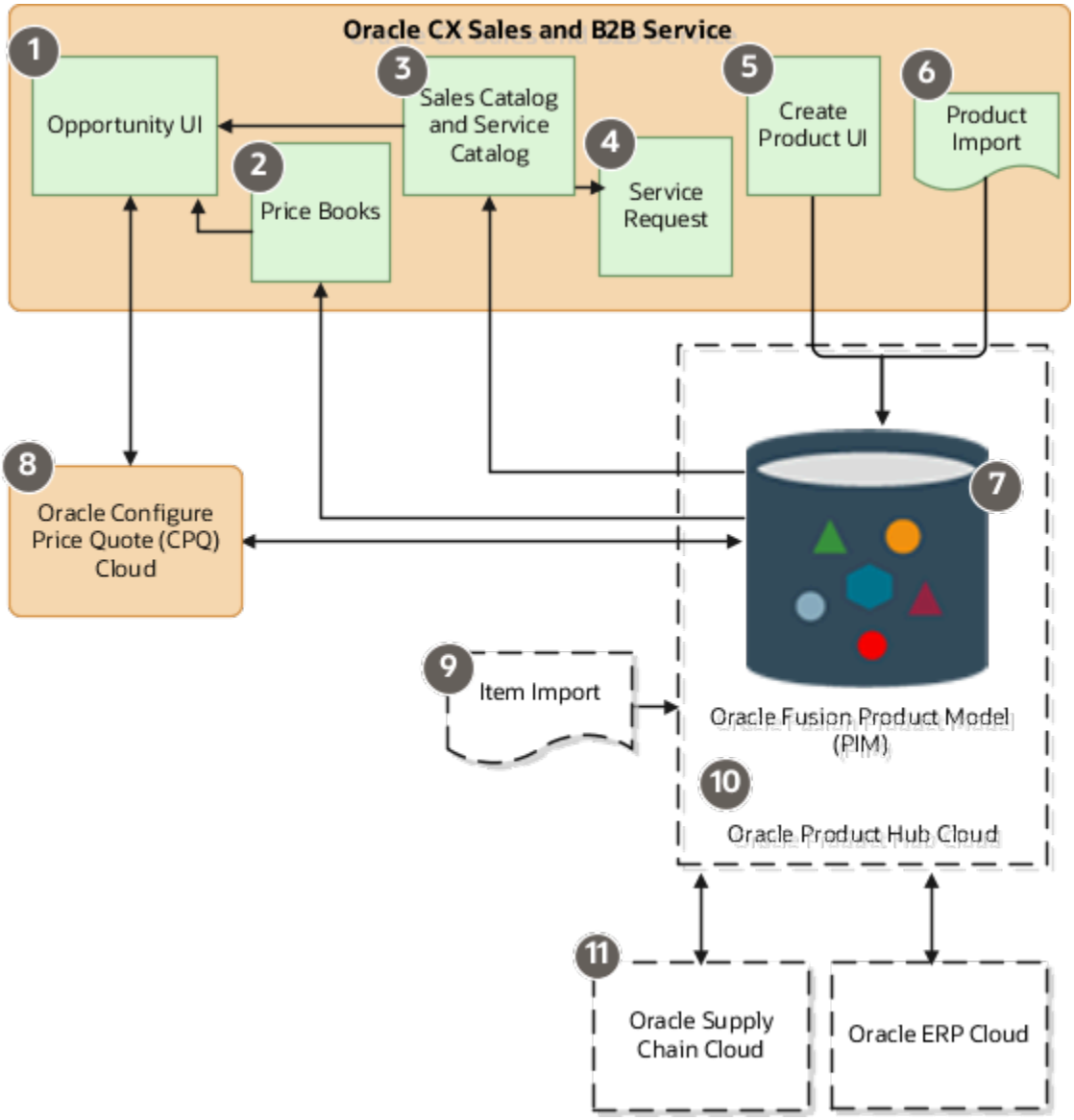
Products you create are also stored in the Oracle Fusion Product Model, which serves as the master item repository for all front-office cloud services. So, the product you create can be priced and quoted in Oracle CPQ Cloud and serviced in Sales and Fusion Service.

The Oracle Fusion Product Model, which is included with the different cloud services, provides basic functionality for use in the front-office cloud services. If you're implementing supply chain cloud services or ERP cloud services together with your sales application, then you must license the Oracle Product Hub Cloud Service and set up your items using the UIs and import features of Oracle Product Hub Cloud. You can't create products in your sales application with enough detail that would make them suitable for back-office supply chain applications. Sales applications don't need to track the physical locations of the items you're selling or shipping, for example, so all products you create in the sales application are created at the Item Master Organization level in the Oracle Fusion Product Model. Only the Oracle Product Hub Cloud includes the ability to manage item classes. All products created in the sales application are created at the default item class and use the Production design phase.

The following diagram outlines the role products play in Sales, Fusion Service and related cloud services:

- In Oracle CX Sales and Fusion Service, you can create the products for your sales and service catalogs either individually in the UI (indicated by callout 5) or you import products from a file (callout 6).
- Product records are created both in Sales and Fusion Service and in the Oracle Fusion Product Model (callout 7).

- You expose the products in the sales or service catalogs (callout 3) by associating them with product groups.
- Salespeople can browse or search the sales catalog from the Opportunity UI (callout 1) and select the products the customer is interested in buying. Only products with the Eligible to Sell option selected appear in the sales catalog.
- Service agents enter products from the Service Request UI (callout 4). Only products with the Eligible for Service option selected appear in the service catalog.
- You can price the products using price books (callout 2), or create quotes for them in Oracle Configure, Price, and Quote Cloud (callout 8). Price books and CPQ Cloud require additional integration, so aren't covered in this guide. (Although price books are a sales feature, you must integrate them with opportunities using Groovy scripting.)
- The Oracle Fusion Product Model (callout 7) forms the foundation of the Oracle Product Hub Cloud (callout 10), a powerful product management application designed for supply chain, order management, and inventory tasks, which must be licensed separately. Because the sales application uses less than a dozen of the hundreds of the item attributes that can be captured in Oracle Product Hub, you can't use the sales UIs or product import if you're implementing Oracle Product Hub Cloud. To create products in Oracle Product Hub Cloud that can be used with Oracle Supply Chain Cloud or Oracle ERP Cloud (callout 11), you must use the Oracle Product Cloud Hub UI and item import (callout 9).



Overview of Sales Catalog Setup

The Setup Assistant completes all the prerequisites for creating your sales catalog, so you're ready to import the product groups and products and publish the catalog. Here's an overview.

What Setup Assistant Completes for You

- Creates the root product group.
- Creates all the prerequisites for creating and importing products. This includes creating the required item master organization and the units of measure provided by Oracle Fusion Product Model.
- Enables the sales catalog for use by selecting the root node as the "base usage". This step tells the application which product groups to display in the sales catalog.

- Runs the scheduled process Refresh Denormalized Product Catalog Table for BI. This process must be run each time you change the base usage.

Overview of Steps to Perform Manually

Here's an overview of the setups you must complete manually.

Note: This chapter explains how to create products in your catalog by importing them. For information on how to create individual products in the UI, see the topic *Create Products* and the rest of the Products chapter in the Sales Implementation Reference guide.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Digital Sales and CX Sales	Review the units of measure to make sure you have all you need.	**Setup and Maintenance** > **Sales** > **Sales Catalog and Products** > **Manage Units of Measure**	See the topic: *Review Units of Measure for Products*
2	Both Digital Sales and CX Sales	From My Oracle Support, download the Excel macros and the `.jar` file you need to import products and product groups to a folder on your desktop. Importing the sales catalog involves four steps using separate macros: 1. You import the products 2. You import the product groups 3. You import the relationship between the products and product groups, specifying which products belong in which product groups 4. You import the structure of the product groups in the catalog	In your browser, navigate to support.oracle.com and search for the document (Doc ID 2229503.1).	See the topic: *Download the Macros for Importing Products and Product Groups*
3	Both Digital Sales and CX Sales	Enter product information in the product import macro (Product_Import_Macro.xslm) and import the products.	You carry out this task in the Excel macro.	See the topic: *Enter Data into the Product Import Macro and Import*
4	Both Digital Sales and CX Sales	Verify the products you imported in the Products work area and, optionally, add product images.	In your application, navigate to the Products work area and search for each product you want to edit.	See the topic: *Verify Imported Products and Add Product Images*

Step	Applies To	Description	Navigation	Where to Get More Details
5	Both Digital Sales and CX Sales	Import the relationships between product groups and products using the product group and product relationship macro (ProductGroupItem_Import_Macro.xslm).	You carry out this task in the Excel macro.	See the topic: *Import the Relationships Between Product Groups and Products*
6	Both Digital Sales and CX Sales	Obtain the reference number for the root product group Setup Assistant created for you. You need the reference number to create the link between the root and the product groups you import.	**Setup and Maintenance** > **Sales** > **Sales Catalog and Products** > **Manage Product Groups**	See the topic: *Obtain the Reference Number for the Root Product Group*
7	Both Digital Sales and CX Sales	Enter the product group hierarchy information in the product group relationship macro (ProductGroupRelationSetup Import_Macro.xslm).	You carry out this task in the Excel macro.	See the topic: *Import Product Group Hierarchy Information*
8	Both Digital Sales and CX Sales	Validate the sales catalog on the Manage Product Groups page.	**Setup and Maintenance** > **Sales** > **Sales Catalog and Products** > **Manage Product Groups**	None
9	CX Sales	Enable browsing of the sales catalog while editing opportunities by setting the system profile option Browse Sales Catalog in Opportunities Enabled (MOO_ENABLE_BROWSE_CATALOG), to Yes. **Note:** Browsing of the catalog happens automatically in Digital Sales, so there's no setup needed.	**Setup and Maintenance** > **Sales** > **Opportunities** > **Manage Opportunity Profile Options**	See the topic: *Enable Sales Catalog Browsing in Opportunities*
10	Both Digital Sales and CX Sales	Sign in as a sales user and validate that your sales catalog shows up in opportunities.	**Navigator** > **Digital Sales** > **Create Opportunity**	See the topic: *Validate the Sales Catalog*
11	Both Digital Sales and CX Sales	Let salespeople filter the catalog display by only their own territories or with products or product groups from all territories they have access to.	**Navigator** > **Digital Sales** > **Create Opportunity**	See the topics, *Territory Filtering of Products in the Catalog* and *Set Territory Filter Options*

Review Units of Measure for Products

The sales organization uses units of measure to sell and price the products in the sales catalog. The Setup Assistant automatically creates the default units of measure provided by Oracle SCM Cloud for you. Use this step to review the defaults.

To set up additional units of measure and classes, follow the instructions in the *Implementing Common Features for SCM* guide. For example, if you're selling goods priced by the box, then you may want to add Box to the Count class of measure.

1. In Setup and Maintenance, go to:
    - Offering: Sales
    - Functional Area: Sales Catalog and Products
    - Task: Manage Units of Measure
2. On the Manage Units of Measure page, review the list of classes in the **Class Name** list in the Search section. You can view the units of measure for each class by clicking **Search**.

Import Products and Product Groups

Download the Macros for Importing Products and Product Groups

Download the four macros for importing products and product groups from My Oracle Support.

Note:

- This guide focuses on importing your data using import Excel macros. See the *Understanding Import and Export Management* guide to learn how to import data without the macros.
- Importing products and product groups applies to both CX Sales and Digital Sales.
- For information on how to create individual products in the UI, see the topic *Create Products* and the rest of the Products chapter in the Sales Implementation Reference guide.

1. Sign in to My Oracle Support.
2. Search for the document Oracle CX Sales: Getting Started with Your Sales Implementation: Import Macros (Doc ID 2229503.1)

3. In the Details section of the document, locate the portion appropriate to your application update, and download these files to a folder on your computer. You can create different folders for the different macros provided that the Product Import Macro folder includes the `.jar` file.

File Name	Description
`oracle_ucm_client_11.1.1.jar`	You must include this file in the same directory as the import macro.
Product_Import_Macro.xslm	Import products.
ProductGroup_Import_Macro.xslm	Import product groups.
ProductGroupRelationSetup_Import_Macro.xslm	Import the product group hierarchy.
ProductGroupItem_Import_Macro.xslm	Import the relationship between product groups and products.

Enter Data into the Product Import Macro and Import

Follow these steps to enter data into the Product Import Macro and perform the import. You can import up to 5,000 product records at a time.

1. Open the Product Import Macro file you downloaded earlier.
2. Make sure macros are enabled in Excel.
3. On the UOM worksheet, click **Populate UOM from Server**.
4. On the Login page, enter the following:
    - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/`.
    - Your user name
    - Your password
5. Click **Submit**.

   The macro retrieves the units of measure you set up from your environment and enters them into the worksheet so they are available as the list of values in the Primary UOM field in the Template worksheet.
6. The Product Type worksheet lists the product types you can use to classify your products supplied by Oracle. You can update this list using the following steps. Unless you created new product type values in lookup type QSC_SALES_PRODUCT_TYPE (not covered in this guide), then you can skip this step.
    a. Click **Populate Product Type from Server**
    b. The Login window still contains the host, user name, and password you entered previously, so click **Submit**.

       The macro retrieves the latest product types from your environment and enters them into the worksheet so they are available as the list of values in the Product Type field in the Template worksheet.

7. If you want to import additional fields, then do the following:
    a. Click the **Attributes Mapping** tab.
    b. Click **Fetch Attributes from Server**.
    c. In the Login window, enter the following:
        - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/`.
        - Your user name
        - Your password

        The macro fetches available product attributes, including any custom attributes you created, from the application.
    d. Add the additional attributes you want to import as follows:
        i. In the Attribute Name column, select the field you want to import.
        ii. In the Column Header column, enter the name you want to appear as the column header in the Product worksheet.
    e. Click **Update Headers**.
8. In the Template worksheet, enter your product data. The macro requires just three pieces of information:
    - Product number
    - Name
    - Primary UOM

    Here are the details for each existing product attribute:

Column	What to Enter
Product Number	You can enter the unique product number of the product or leave this required column blank. If you don't enter a product number, then the macro generates the product number automatically using the date and time. The product number displays in the product records visible in the Products work area and the application uses the product number to identify the product record for updates.
Name	The product name as it appears in the sales catalog.
Description	Enter a text description.
Primary UOM	Unit of measure. One of the values in the UOM worksheet.
Product Type	Product type. One of the values in the Product Type worksheet.
Eligible to Sell	Enter `Y` to make the product appear in the sales catalog and to associate it with product categories.

Column	What to Enter
	If you don't make an entry in this column, then the macro automatically populates the value of `Y`. A value of `N` imports the product, but doesn't show it in the catalog or make it available for selection by salespeople.
Eligible for Service	This column is used only if you're integrating with the Oracle Fusion Service. A value of `Y` enables service requests for this product. If the product is not eligible for service, then enter `N`. If you leave this column blank, then the macro automatically populates the value of `Y`.
Enable Customer Self-Service	This column is used only if you're integrating with the Oracle Fusion Service. Enter `Y` to enable customers to view the product on the self-service portal. Otherwise enter `N`. If you leave this column blank, then the application populates an N for products of the following product types: o Extended Warranty o Included Warranty o Preventive Maintenance o Service Level Agreement o Software Maintenance You can't enter a value of `Y` for these product types into the macro. The macro enters a `Y` for the rest of the product types supplied by Oracle. You must provide a value for any product types you created.

9. When you're done with your entries, click **Create Import Activity**.
10. If you're prompted to correct errors, here's what to do:
    a. Click **OK**

       The Error worksheet displays your errors.
    b. Click each error link in column D and make the correction on the Template 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.
11. On the Login page, enter the host, user name, and password if required.

12. Click **Submit**.

    The application displays one of these messages:

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

13. If your import activity was submitted successfully, then click **Activity Details**.

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

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is `Completed`.

14. Optionally, click **Generate Log** to save a file listing the products that were imported.

Verify Imported Products and Add Product Images

You can verify the products you imported and add images in the Products work area.

1. Navigate to the Products work area in CX Sales.
2. Search for the product by product number or product name:
    a. Click **Advanced Search**.
    b. In the Advanced Search pane, click **Add** and select **Name** from the list.
    c. Enter the product name or the first few letters of the name in the field.
    d. Click **Search**.
3. Click the product number link for the product
4. Here are the steps to add a product image on the Edit Product page:
    a. Click **Manage Attachments** (plus sign icon) under the Images heading.
    b. In the Attachments window, click **Choose File** and select the image.

       You can only include one image for each product.
    c. Click **OK**.
5. Click **Save and Close**.

Import Product Groups

Here's how to import product groups. You can import as many as 5,000 records at a time. Each import must complete before you start another.

1. Open the Product Group Import Macro you downloaded earlier.
2. Make sure macros are enabled in Excel.
3. In the **ProductGroup** worksheet, enter the product groups in your sales catalog hierarchy starting at the top of the hierarchy, right underneath the root product group you created earlier. You must enter the parent for each product group.

   Here are the details of each column:

Column	What to Enter
Product Group Reference Number	Enter a unique alphanumeric ID up to 50 characters in length. You can enter the product group name without any spaces. For example, if your product group is Green Servers, you can enter `GreenServers`. The macro enters this value as the Product Group Internal Name for each product group. The Product Group Internal Name is visible in the Manage Product Groups task UIs.
Product Group Internal Name	Optionally, enter a product group internal name of up to 150 characters in length, which is also visible in the Manage Product Groups task UI. This field is included for customers who may have lengthy internal IDs for their products. If you leave this field blank, the macro copies the Product Group Reference number into this field.
Product Group Display Name	The name of the product group as it will appear in the sales catalog.
Product Group Description	Enter a text description. This text is not visible to salespeople while making product selections.
Allow Selection Flag	A Y value in this column means that salespeople can select the product group when entering a customer's product interest in opportunity revenue lines. An N value means they can't.

4. When you're done with your entries, click **Create Import Activity**.
5. On the Login page, enter the following:
   - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/sales`.
   - Your user name
   - Your password
6. Here's what to do if you're prompted to correct errors in your entries:
   a. Click **OK**.

      The Error worksheet displays your errors.

b. Click each error link and make the correction.

> **Note:** After you correct an error, you must click outside the field for the correction to be recognized.

c. Click **Create Import Activity** again.

7. Click **Submit**.

   The application displays one of these messages:

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.
`Unable to submit the file import activity. Check log for details.`	You most likely entered the wrong mapping number or the user doesn't have the correct permissions. Open the Errors work sheet to view the error details.

8. If your import activity was submitted successfully, then click **Activity Details**.

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

   - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
   - If your import completed successfully, then the status listed is `Completed`.

9. Optionally, click **Generate Log** to save a file listing the product groups that were imported.

Import the Relationships Between Product Groups and Products

Import the relationship between product groups and products.

> **Note:** You can only relate a product to a product group if the product has the Eligible to Sell option set to Y.

1. Open the file ProductGroup_Import_Macro.xlsm with the product groups you just imported. You use the product group reference numbers to identify the product groups.
2. Open the Product_Import_Macro.xlsm file with the products you imported. You use the product numbers in this file to identify the products.
3. Open ProductGroupItem_Import_Macro.xlsm.
4. Make sure macros are enabled in Excel.
5. In the ProductGroupItem_Import_Macro.xlsm file, for each product, enter the product group reference number and the product number.
6. When you're done with your entries, click **Create Import Activity**.

7. On the Login page, enter the following:
    - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/sales`.
    - Your user name
    - Your password
8. Here's what to do if you're prompted to correct errors in your entries:
    a. Click **OK**.

    The Error worksheet displays your errors.
    b. Click each error link and make the correction.

    > **Note:** After you correct an error, you must click outside the field for the correction to be recognized.

    c. Click **Create Import Activity** again.
9. Click **Submit**.

    The application displays one of these messages:

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.
`Unable to submit the file import activity. Check log for details.`	You most likely don't have the correct permissions. Open the Errors work sheet to view the error details.

10. If your import activity was submitted successfully, then click **Activity Details**.

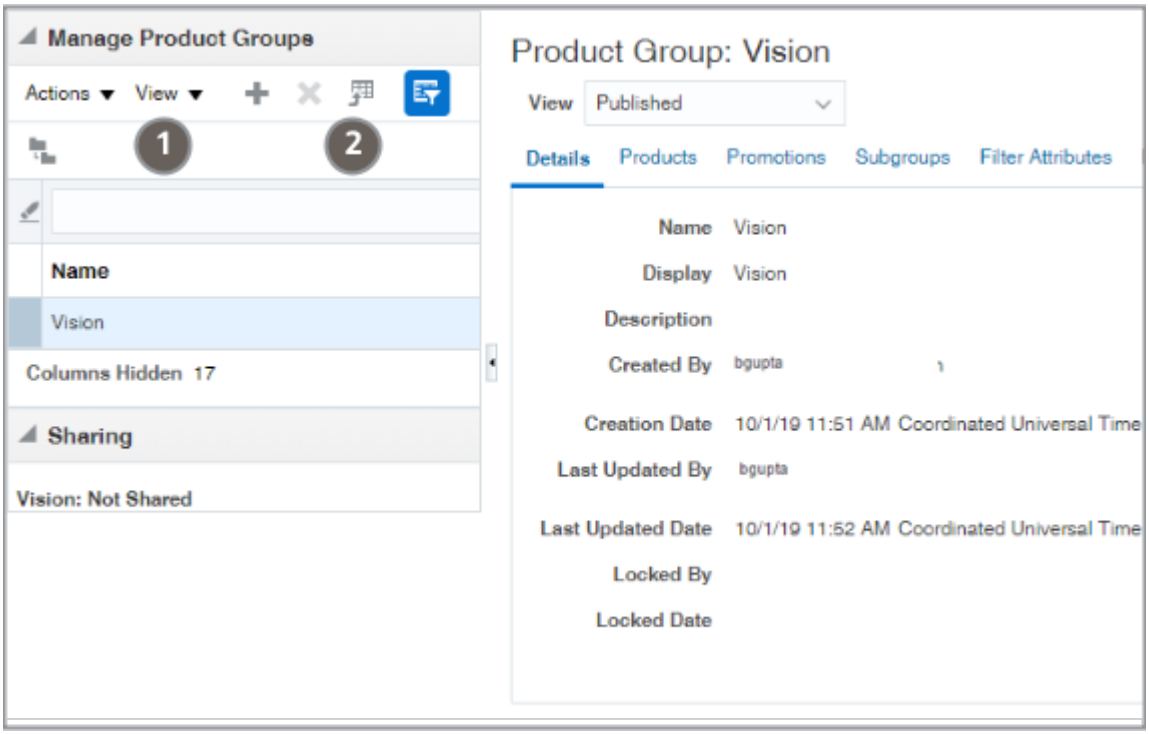
    The Activity Details window appears, listing the import activity name, its ID and its status.
    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is `Completed`.
11. Optionally, click **Generate Log** to save a file listing the product groups that were imported.

Obtain the Reference Number for the Root Product Group

Use this procedure to obtain the product group reference number of the root product group Setup Assistant created for you. The reference number links the product group hierarchy you're importing to the root product group.

1. Open the task **Manage Product Groups** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Sales Catalog and Products
    - Task: Manage Product Groups

    Here's a screenshot of the Manage Product Groups page highlighting the View menu (callout 1) and the Download to Excel icon (callout 2).



2. In the left pane of the window, click **View** and select **Columns**, **Show All** to display all columns.
3. Click the **Export to Excel** icon and save the Excel file to your desktop. The reference number you need is in column D.
4. Click **Cancel**.

Import Product Group Hierarchy Information

After importing the product groups themselves, you must import the relationships between them to build the catalog hierarchy.

1. Open the file ProductGroup_Import_Macro.xlsm with the product groups you just imported. You use the product group reference numbers to build the hierarchy.

2. Open ProductGroupRelationSetup_Import_Macro.xlsm.
3. Make sure macros are enabled in Excel.
4. In the ProductGroupRelationSetup_Import_Macro, enter the reference number for each product group and the reference number for its parent. For the product groups immediately under the root product group, you must enter the root product group reference number you got from the UI.
5. When you're done with your entries, click **Create Import Activity**.
6. On the Login page, enter the following:
    - Host information for your environment. The host name is the portion of the URL of your environment between `https://` and `/sales`.
    - Your user name
    - Your password
7. Here's what to do if you're prompted to correct errors in your entries:
    a. Click **OK**.

    The Error worksheet displays your errors.
    b. Click each error link and make the correction.

    > **Note:** After you correct an error, you must click outside the field for the correction to be recognized.

    c. Click **Create Import Activity** again.
8. Click **Submit**.

    The application displays one of these messages:

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.
`Unable to submit the file import activity. Check log for details.`	You most likely don't have the correct permissions. Open the Errors work sheet to view the error details.

9. If your import activity was submitted successfully, then click **Activity Details**.

    The Activity Details window appears, listing the import activity name, its ID and its status.
    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is `Completed`.
10. Optionally, click **Generate Log** to save a file listing the product groups that were imported.

Enable Sales Catalog Browsing in Opportunities

By setting a profile option, you make it possible for salespeople to browse the sales catalog while editing opportunities. While browsing, salespeople get to view the product group hierarchy, search, and add any of the product groups or products as opportunity lines.

> **Note:** This functionality applies only to CX Sales. Browsing of the catalog happens automatically in Digital Sales, so there's no setup needed. See the *Overview of the Sales Catalog* topic in this chapter for some visual examples of the Digital Sales behavior. Also see the topics, *Add Products to an Opportunity* and *Add Products to a Lead* for more information on the end user tasks in Digital Sales.

After you set the profile option, Browse Sales Catalog in Opportunities Enabled, to Y, the Browse Catalog button appears on the Edit Opportunity page above the Products table in CX Sales. If you don't display the button, salespeople can still enter product groups and products in opportunity lines. They just can't browse the catalog.

> **Note:** Ensure that the Product and Product group objects are enabled for Adaptive Search. While records you create and update in the UI are automatically indexed and made searchable within seconds, imported records or records updated by background processes aren't available for search until the indexing process completes.

Set the Profile Option

1. Open the task **Manage Opportunity Profile Options** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Opportunities
    - Task: Manage Opportunity Profile Options
2. In the Manage Opportunity Profile Options page, enter **Browse Sales Catalog in Opportunities Enabled** in the **Profile Display Name** field.
3. Click **Search**.
4. In the search results, click on the profile option name link.
5. Set the profile option value to **Y**.
6. Save your changes.

Validate the Sales Catalog

Now that you've created the catalog, you can check that it's visible in opportunities and leads.

1. Sign in as a sales manager or a salesperson.
2. in Digital Sales home page, click **Create Opportunity** or **Create Lead**.
3. On the Create Opportunity page, enter the opportunity name and click **Save**.
4. Open the opportunity you created.
5. In the Action Bar, enter `add` and select Add Products.
6. Verify that your product groups (and products if applicable) display in the catalog.

See *Add Products to an Opportunity* and *Add Products to a Lead*for more information on the end user tasks.

Filter Catalog Display by Territory

Territory Filtering of Products in the Catalog

Configure whether the sales catalog displays only product groups and products within a user's sales territories, or if it displays all product groups and products defined in the catalog.

Furthermore, you can configure whether to have territory filtering off by default, and to let users turn the territory filter on or off as they view products and product groups. See the *Set Territory Filter Options* topic for more information.

As they add products or product groups to leads or opportunities, depending on how you set up this feature, users can toggle the **Filter by Territory** option on or off. For example, while editing an opportunity, a salesperson enters "add products" in the search bar. The list of product groups or products appears, where the user can select from product groups and products. The salesperson can enable or disable the **Filter by Territory** option (depending on setup), to have the display of product groups and products limited to only those in her assigned territories.

For setup steps, see *Set Territory Filter Options*.

See *Add Products to an Opportunity* and *Add Products to a Lead* for more information on the end user tasks in Digital Sales.

Set Territory Filter Options

You set the territory filtering options in the product groups setup pages.

You set the territory filtering options in the product groups setup pages.

1. Sign in as the sales administrator.
2. In Setup and Maintenance, go to::
    - Offering: Sales
    - Functional Area: Sales Catalog and Products
    - Task: Manage Product Group Usage
3. Select the **Base** catalog in the upper portion of the page. (If your catalog uses a different usage, then select it.)
4. Click the **Functions** tab in the Details section of the page.
5. Click the **Value** drop-down list for the **Territory engine** option. If multiple applications have a **Territory engine** row, then select the row that has the application you want the filtering to apply to. The applications that can use the territory filtering functionality appear in the Mode column of the Functions tab. For example, click **Territory engine** for the Opportunity Management application shown in the Mode column.
6. Make your filtering selection, using the information in the following table.
    1.

Option	Description
Do not run	Territory filtering is off. The Filter by Territory check box does not display.

Option	Description
Enforce territory	Territory filtering is on, but is transparent to the user. The Filter by Territory check box does not display.
Display choice - checked by default	Territory filtering is on. The territory filter check box is displayed and checked by default. The user can deselect the check box to disable the territory filtering.
Display choice - unchecked by default	Territory filtering is off. The territory filter check box is displayed and deselected by default. The user can check the check box to enable the territory filtering.

7. Click **Save and Close**.

15 Accounts and Contacts

Account and Contact Basics

Some basic terminology first. Your sales application is set up for business-to-business sales, so accounts are the organizations you sell to. The account Type field indicates if an account is a prospect or a customer. You can create contacts for a specific account or you can create standalone contacts.

Accounts in the CX Sales UI

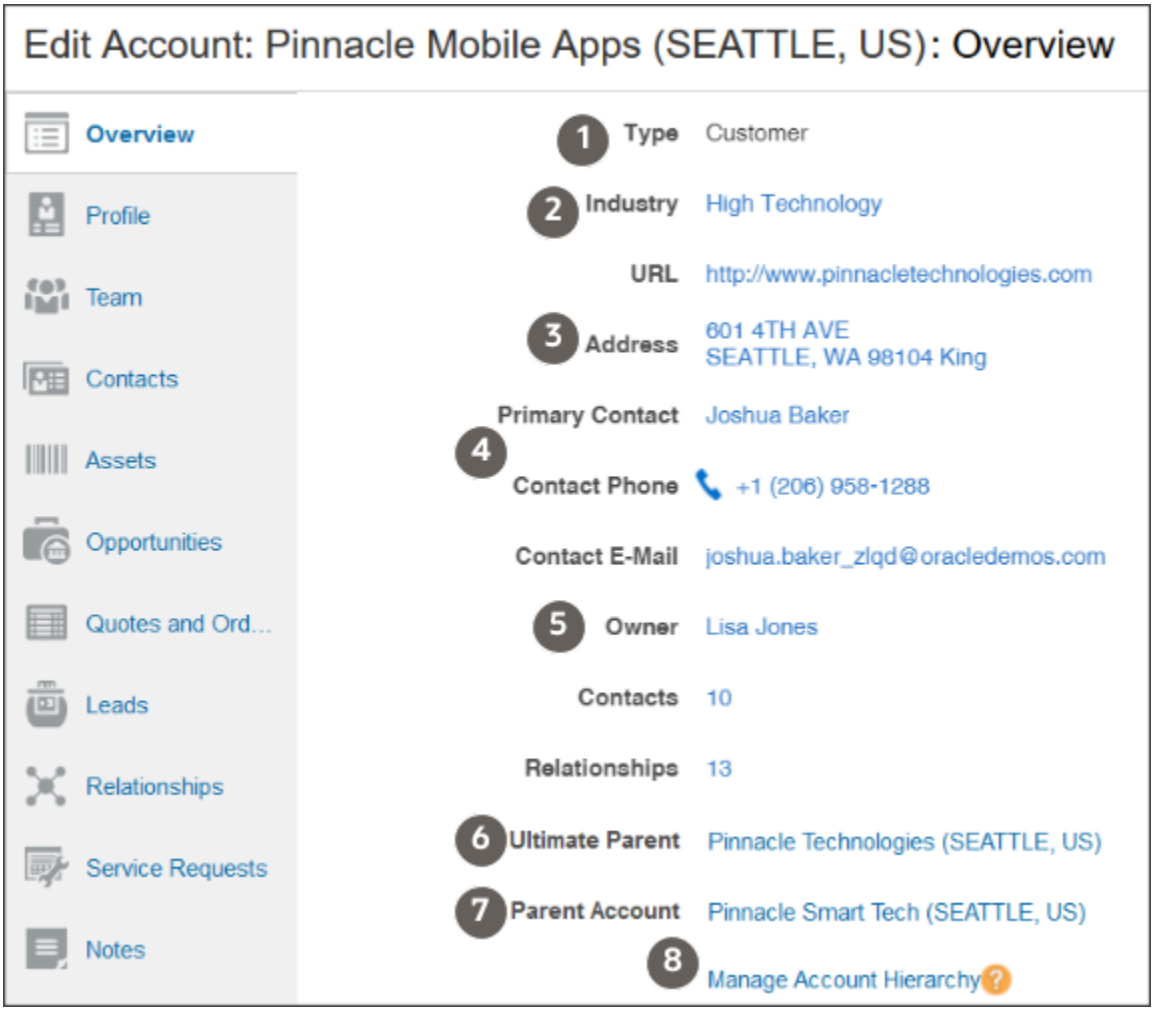
You can track lots of information for accounts in the various tabs, but most of the information comes from other business objects. For account-specific information, you use the Overview and Profile tabs. Here's what you can tell about the sample account in the screenshot just by looking at the Overview tab:

- You know that this account is an existing customer because the account Type field (callout 1) is set to Customer.
- The Industry field displays the primary industry for this customer (callout 2).

  You can add multiple industries for each account, but, if you're assigning accounts by industry, then the account gets assigned using the primary industry.

  > **Tip:** If you're planning to assign accounts by industry, you may want to make entry in the Industry field required when salespeople create accounts. While you can use Application Composer to make most fields required, Industry isn't one of them. For Industry, you must use a combination of Page Composer and some Groovy scripting. See these Oracle Support documents: 2261254.1 and 2193779.1.

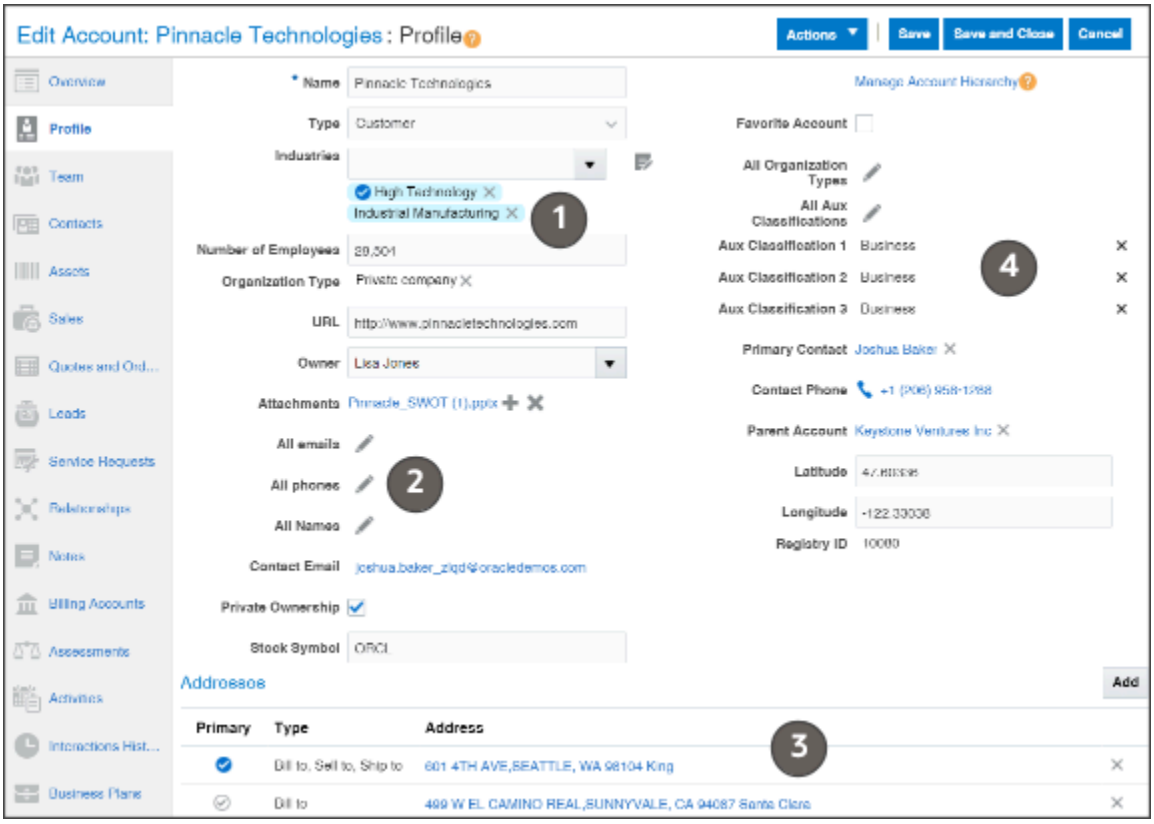
- The tab displays the primary address (callout 3) and information about the primary contact (callout 4).
- The account owner (callout 5) is usually the person who created the account, but can be reassigned.
- If you're tracking account relationships, clicking the **Ultimate Parent** field (callout 6) gets you to the top of the account hierarchy. You must expose this field during setup.
- The Parent Account (callout 7) just gets you to the immediate parent account.
- You can view and edit the whole account hierarchy by clicking **Manage Account Hierarchy** (callout 8).



On the Edit Account, Profile tab, salespeople can add additional industry classifications for the account (callout 1 in the following screenshot). Without further setup, sales territory assignment uses only the primary industry, indicated by the check mark icon.

There are multiple ways that you can configure the Profile tab. For example, you can:

- Capture multiple emails, phones, and names and tack customer and contact preferences (callout 2).
- Capture multiple addresses. Only the primary address is used for opportunity assignment (callout 3)
- Display additional fields, including your own classifications that you can use for opportunity assignment (callout 4).



Accounts in the Digital Sales UI

Accounts in the Digital Sales UI are very different. Gone are the tabs and much of the detail on the overview page. Records are divided into three sections:

- Summary (callout 1 in the screenshot)

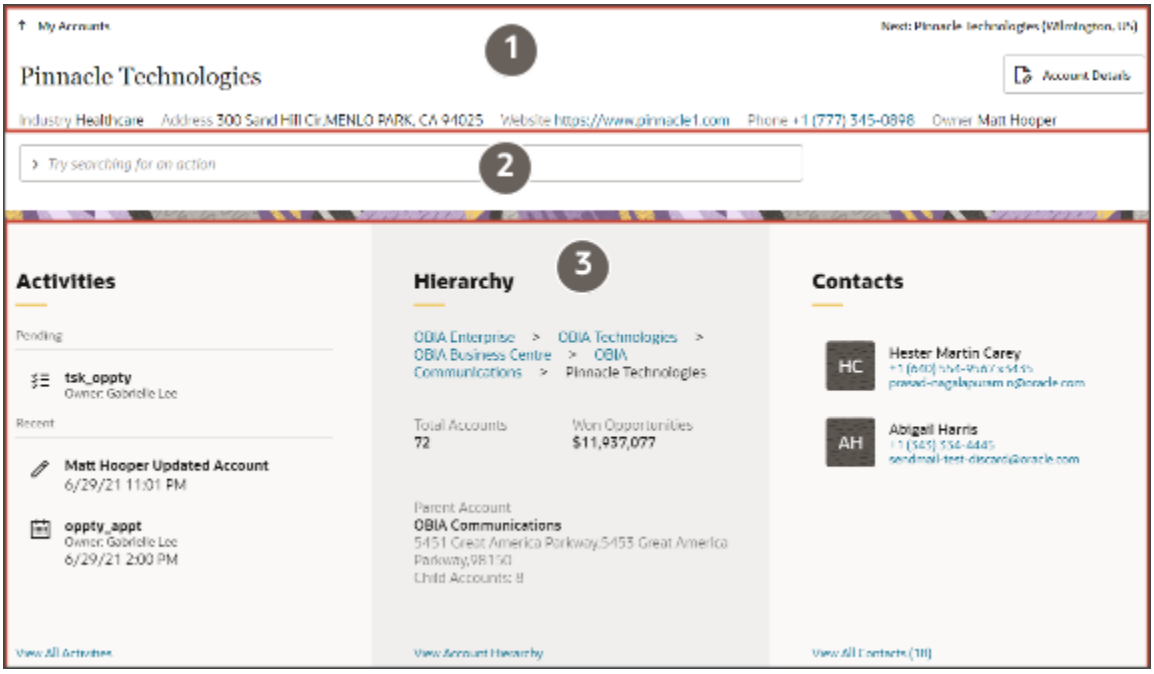
  Lists the primary information about the account and contact.

- Action Bar (callout 2)

  Instead of clicking on tabs as you do in CX Sales, you enter commands to view and enter detailed information about the account.

- Panels with key information (callout 3)

  Key related information about the account is displayed in panels and linked pages. You access other information using the Action Bar.



For more information about the way Digital Sales has transformed the UI layout and functionality see the topic *Anatomy of a Record*.

Industry Classification Category Types for Accounts

You can specify which industry classification category you want to use for your accounts. By default, the application uses the CUSTOMER_CATEGORY classifications created by Oracle. The other classification available categories include:

- 1972 SIC
- 1977 SIC
- 1987 SIC
- CUSTOMER_CATEGORY
- NACE
- NAF
- NAICS_1997
- NAICS_2002

You can add other classification categories, such as NAICS 2012 and NAICS 2017, to this list as described in the topic: Add to the List of Available Industry Classification Categories.

If you plan to enrich your account records with Dun & Bradstreet Corporation data available from Oracle Data as a Service (DaaS), then you must either select the 1987 SIC category or add another supported category, such as NAICS 2017, to the list.

Related Topics

- Add to the List of Available Industry Classification Categories
- Enable Address Usage Types for Accounts
- Enable Display of Multiple Addresses

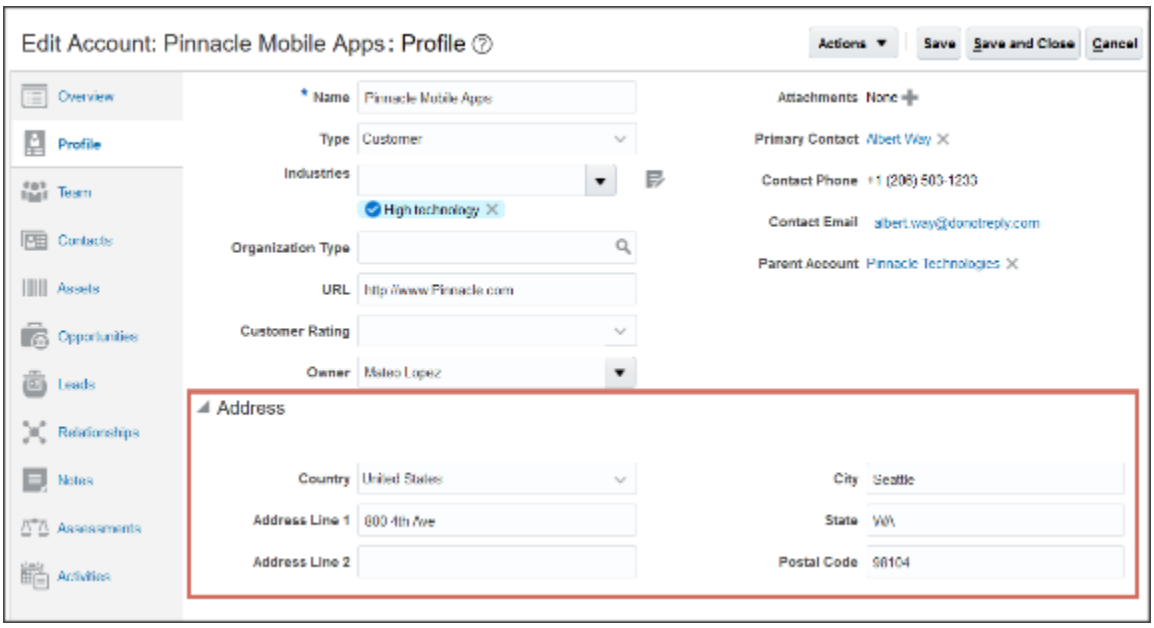
Account Addresses

As delivered, the CX Sales accounts pages display a single primary address for each account. You can make it possible for salespeople to view and enter additional addresses by configuring the Profile tab on the Edit Account page. This setup isn't required for Digital Sales. Digital Sales accounts can store multiple addresses without any setup.

When you expose multiple addresses, salespeople can indicate the address type and they can designate any one of the addresses as the primary address. The application uses the primary address for assigning accounts, opportunities, and leads by address. The primary address is also the address that gets displayed automatically wherever addresses are listed.

Single Address

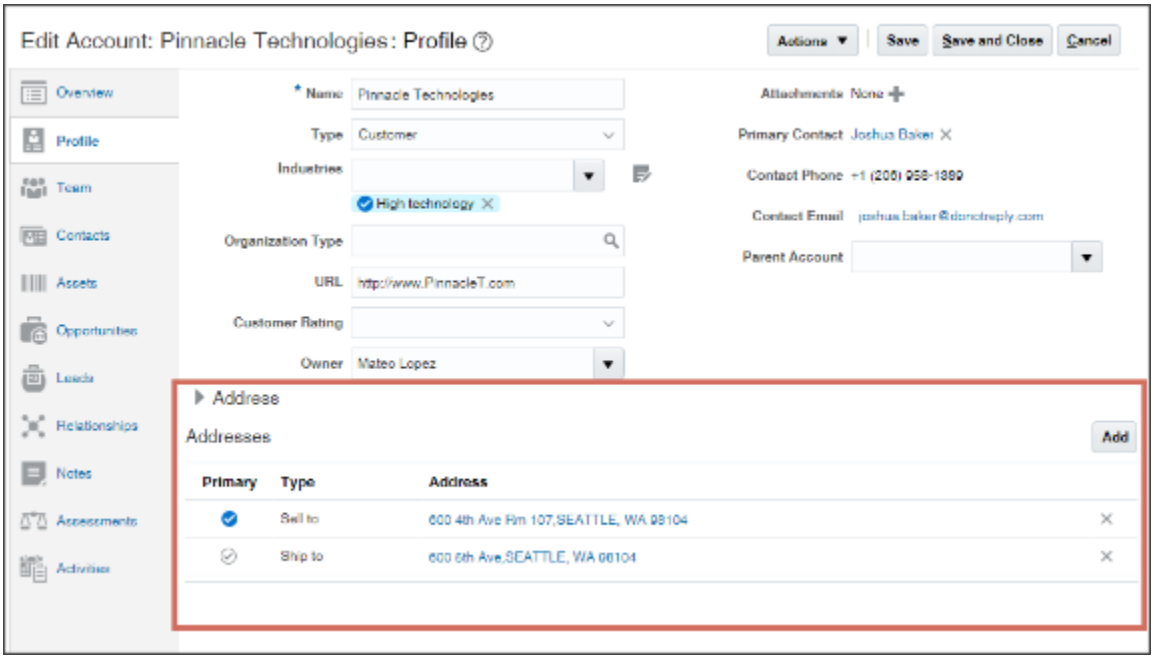
By default, the Profile tab of the Edit Account page displays the Address section with the primary address for the account. Here's a screenshot.



The single address UI doesn't display the address type, which is set as "Sell to" under the covers. You can set a different default type using the system profile option Default Address Type for Account.

Multiple Addresses

When you configure the Profile tab to display multiple addresses, salespeople see the Addresses section listing the multiple addresses. On the tab, you can select any address as primary or delete it. You drill down on an address to edit it or change its type. Here's a screenshot of the tab.



You add addresses by clicking **Add**. Here's a screenshot of the Add Address window.



You select one of the available address types from the **Type** list. An account can have multiple addresses of the same type. You must display the **Type** field in the window as part of your setup.

Overview of Account and Contact Setup

Here's an overview of the setups covered in this chapter:

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both CX Sales and Digital Sales	Select the industry classification category you want to use to classify your accounts in the system profile option MOT_INDUSTRY_CLASS_CATEGORY.	• In Setup and Maintenance, go to the following: o Offering: Sales o Functional Area: Territories	See the topics: • *Specify the Industry Classification Category for Accounts* • *Add to the List of Available Industry*

Step	Applies To	Description	Navigation	Where to Get More Details
		If the classification category you want to use isn't available in the system profile, you may be able to add it to the list of available categories using the task Manage Classification Groups. If you're planning to enrich your data with the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) service, you must use the 1987 SIC category unless you add additional classification categories supported by the service, such as NAICS 2017. Choose the classification carefully, especially if you're using the industry of an account for assignment and forecasting. Switching industry categories after you enable sales territories and import account data is complicated. You must load and activate sales territory dimensions again and reimport your account data with the new classification codes.	◦ Show: All Tasks ◦ Manage Classification Groups • In Setup and Maintenance, go to the following: ◦ Offering: Sales ◦ Functional Area: Sales Foundation ◦ Manage Administrator Profile Values	*Classification Categories*
2	Both CX Sales and Digital Sales	Prevent salespeople from entering duplicate contacts and accounts in the UI by enabling automatic duplicate checking. There are just two setups required: • Enable the duplicate matching server. • Activate the duplicate matching configuration provided by Oracle.	• In Setup and Maintenance, go to the following: ◦ Offering: Sales ◦ Functional Area: Sales Foundation ◦ Show: All Tasks ◦ Manage Server Configurations Manage Enterprise Data Quality Matching Configurations	See the topic: *How do I enable duplicate checking in Sales?*
3	CX Sales	As delivered, the accounts UI displays and enables the entry of one primary address for each account. If you need more than one address, you can use Application Composer to enable multiple addresses on the Edit Account page,	**Navigator** > **Configuration** > **Sandboxes**	See the topic: *How can I enable multiple addresses for accounts?*

Step	Applies To	Description	Navigation	Where to Get More Details
		Profile tab. Salespeople can view and enter additional addresses on this tab. Other accounts pages continue to display the primary address. When they add or edit addresses on the Profile tab, salespeople select an address type to indicate how the address is used. You must use the Application Composer tool to expose the Type field on the Add Address window.		
4	CX Sales	You can make it possible for salespeople to go directly to the top account in the account hierarchy, by exposing the Ultimate Parent field in the Edit Account page Overview tab. You can make this Application Composer UI change in the same sandbox as the previous step.	**Navigator** > **Configuration** > **Sandboxes**	See the topic: *Display the Account at the Top of the Account Hierarchy in the Account Overview Tab*
5	Both CX Sales and Digital Sales	By default, the Type field lists three address types: • Bill to • Ship to • Sell to You can specify different and additional address types by editing the lookup type Party Site Use Code (PARTY_SITE_USE_CODE). This lookup type is shared with other Oracle Fusion applications. Only values tagged with SALES_CLOUD are available for use in the sales application.	In Setup and Maintenance, go to the following: • Offering: Sales • Functional Area: Sales Foundation • Show: All Tasks • Manage Standard Lookups	See the topic: *Manage Address Types*

Add to the List of Available Industry Classification Categories

Use these steps to add to the list of available industry classification categories. For example, if you want to use NAICS 2017 for your accounts, you can add it as described here.

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Accounts and Contacts
    - Task: Manage Classification Groups
2. Click **Search** without entering any search criteria.
3. Highlight the row for Industrial Categories in the search results.
4. Click **Edit** (the pencil icon).
5. On the Edit Classification Category Group: Industrial Categories page, click **Add Row** (the plus sign icon).
6. From the **Classification Category** list, select the classification category you want to add, for example, ORA_HZ_NAICS_2017.
7. Click **Save and Close**.
8. On the Manage Classification Category Groups page, click **Done**.

Specify the Industry Classification Category for Accounts

Specify the type of industry classifications you want to use for accounts.

1. Open the task **Manage Administrator Profile Values** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. In the Search: Profile Option region, **Profile Option Code** field, enter `MOT_INDUSTRY_CLASS_CATEGORY`.
3. Click **Search**.
4. If you don't see the classification category you need, try adding additional classification categories to this list as described in the topic: Add to the List of Available Industry Classification Categories.
5. Select the classification category from the **Profile Value** list.
6. Click **Save and Close**.

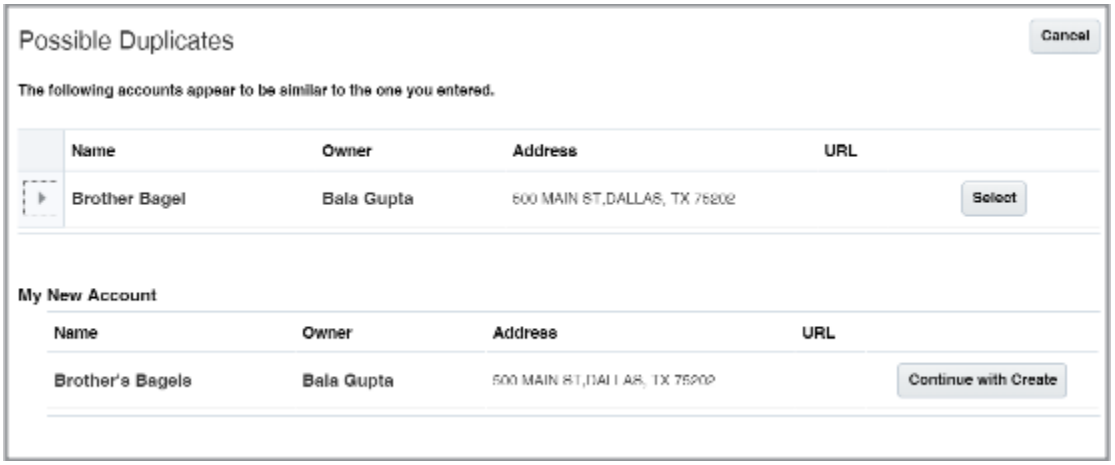
Related Topics

- Add to the List of Available Industry Classification Categories

How do I enable duplicate checking in Sales?

You can have the application automatically check for possible duplicates whenever a salesperson creates an account or a contact. If you're using Oracle Financials, the application checks for potential duplicates in financial accounts as well as sales accounts. Salespeople see the possible duplicates in a separate window and get to decide if they want to continue creating the new record or edit an existing one instead. If they select a financials record that doesn't yet exist in sales, the basic in formation from that record becomes available in Sales as well. Setup is simple: just enable the duplicate checking server, activate the built-in duplicate matching, set a couple of profile options, and you're ready to go.

Here's a screenshot of the window salespeople see when the try to create an account with possible duplicates.



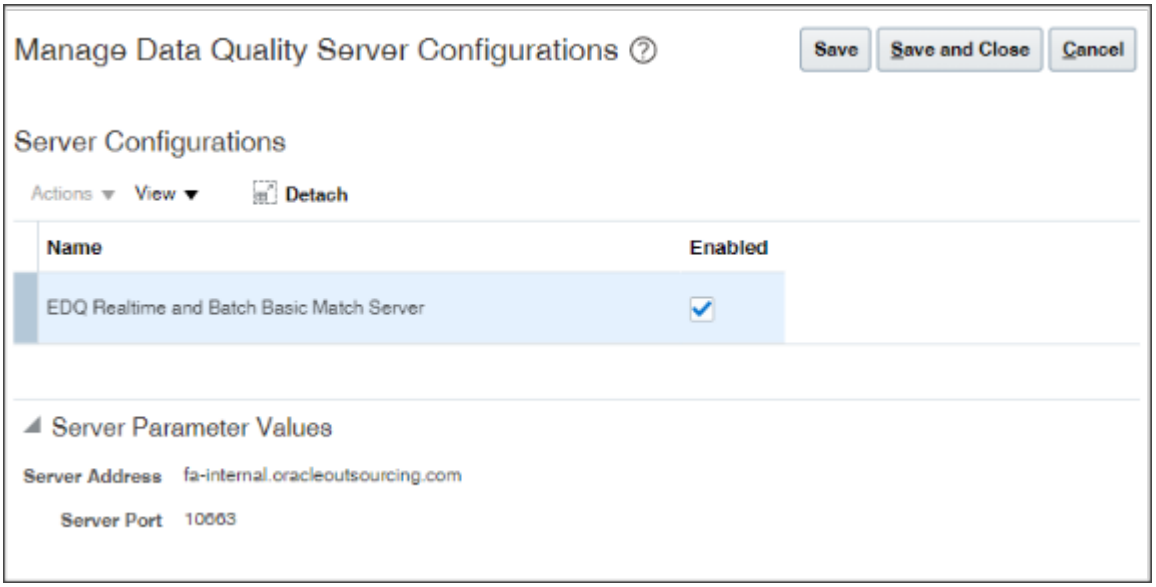
In the background, the application uses sets of rules, called matching configurations, to identify potential account and contact duplicates. If you license Oracle Customer Data Management, you can create matching configurations of your own and you can also check for duplicates in your data in batches. Oracle Customer Data Management includes industrial-strength data cleansing features, but the basic duplicate checking you're enabling here's available free of additional charges.

If you're using Oracle Financials, the application checks for potential duplicates in financial accounts as well as sales accounts.

Enable the Server Used for Duplicate Matching

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Server Configurations

2. Click the **Enabled** option for **EDQ Realtime and Batch Basic Match Server**.



3. Click **Save and Close**.

Activate the Existing Duplicate Matching Configurations

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Enterprise Data Quality Matching Configurations

2. Activate each of the matching configurations provided by Oracle:
    - Account Duplicate Identification
    - Contact Duplicate Identification
    - Address Duplicate Identification

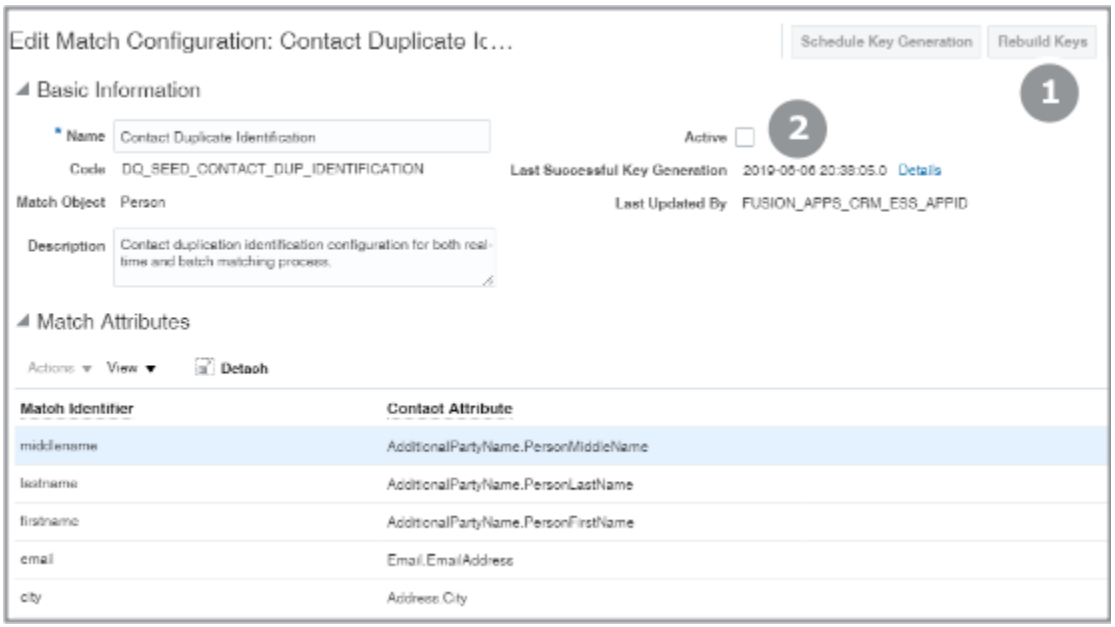
    Here's how:

    a. Drill down into the configuration to edit it.
    b. In the Edit Match Configuration page, click **Rebuild Keys**.

       The application warns you that all existing keys will be purged.
    c. Click **Yes**.

       The application starts the key generation process, which takes a few minutes to complete. The page doesn't automatically refresh the status, but you can monitor the progress of the process in the Scheduled Processes work area (**Navigator** > **Tools** > **Scheduled Processes**)

       Here's a partial screenshot of the Edit Match Configuration page highlighting the Rebuild Keys button (callout 1), which is disabled after you start the process. When the process completes, the page displays the Active option (callout 2).



    d. Select the **Active** option.
    e. Click **Save and Close**.
    f. Reply **Yes** to the warning.
    g. In the Incremental Key Generation window, click **Submit**.

When you're done, all three configurations should now have a check mark in the Active column on the Manage Enterprise Data Quality Matching Configurations page.

Set Profile Options for Account Matches

Set two profile options:

- Duplicate Account Notification (ZCM_ACC_DUP_NOTIFICATION)

  This profile option enables the UI that shows notifications of potential duplicate accounts. Make sure that this profile option is set to TRUE.

- Exact Account Name Match (ZCM_ACC_EXACT_NAME_MATCH)

  If the data quality matching configuration fails to identify potential account duplicates, this profile option enables checks for potential duplicate records using exact name matches. Setting this profile option to TRUE is optional because the data quality checking configuration uses multiple attributes, including the name, D-U-N-S number, tax ID, and address to identify potential duplicates. The exact name match is just an extra check.

1. In the Setup and Maintenance work area, open the **Manage Administrator Profile Values** task:
   - Offering: Sales
   - Functional Area: Sales Foundation
   - Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, **Profile Option Code** field, enter the profile option code name for one of the profiles:
   - ZCM_ACC_DUP_NOTIFICATION
   - ZCM_ACC_EXACT_NAME_MATCH
3. Click **Search**.
4. Set the profile option value to the TRUE.
5. Click **Save and Close**.

How can I enable multiple addresses for accounts?

Here's how to enable multiple addresses for accounts. You can use similar steps to enable multiple addresses for contacts and for other sales objects that display addresses, such as households.

Create and Enter a Sandbox

Create and enter a sandbox with the Application Composer tool enabled.

1. In the Navigator, click **Configuration** > **Sandboxes**.
2. Click **Create Sandbox**.
3. Enter a sandbox name.
4. Select **Active** for **Application Composer**.
5. Click **Create and Enter**.
6. From the sandbox **Tools** menu, select **Application Composer** to enter the tool.

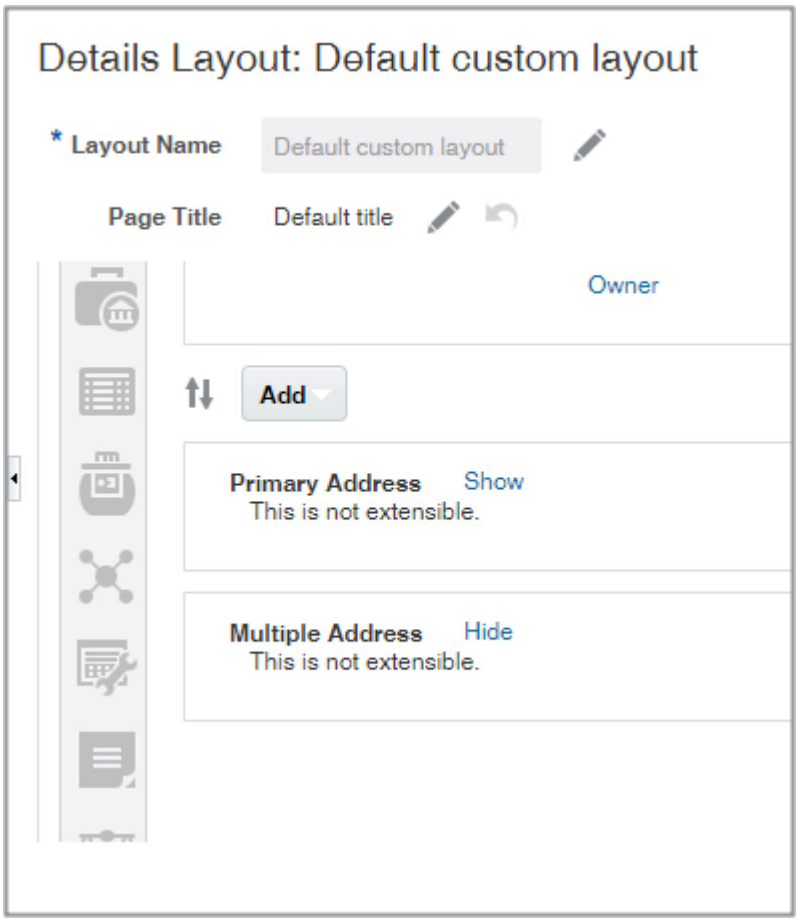
Display Multiple Addresses on the Account Profile Tab

While in Application Composer, expose Multiple Addresses in a custom layout:

1. Open the **Standard Objects** node on the left panel.

   Open the **Account** node.
2. Click **Pages**
3. On the Application Pages tab, scroll down to the **Details Page Layouts** section.
4. Select **Standard Layout** and click **Duplicate**.
5. In the Duplicate Layout window, enter a new name for your layout or just click **Save and Edit**.
6. Drill down into your layout.
7. Click the **Profile** tab in the Subtabs Region.
8. Scroll down until you see the **Primary Address** and **Multiple Address** selections.
9. Click the **Show** link for **Multiple Address**.
10. Click **Hide** for the **Primary Address**.

    Multiple Address now displays **Hide** and **Primary Address** displays **Show**. Here's a screenshot:



   Note: You can't expose both regions at the same time.

11. Click **Done** to leave Application Composer.

Expose the Type Field

Expose the address Type field in the Add Address window. As they add addresses, salespeople use the field to indicate if an address is a sell-to address, a bill-to address, and so on. Exposing the field on the Add Address window automatically adds it to the Edit Address window as well.

1. While in the sandbox and Application Composer, open the **Standard Objects** node on the left panel.

   Open the **Address** node.
2. Click **Pages**
3. On the Application Pages tab, **Creation Page Layouts** section, select the **Standard Layout** and click **Duplicate**.
4. In the Duplicate Layout window, enter a new name for your layout or just click **Save and Edit**.
5. Drill down into your layout.
6. Click **Edit** (the pencil icon) for Create and Edit Address.
7. In the Configure Detail Form section, locate the Type field in Available Fields pane and move it to the Selected Fields pane.
8. Click **Save and Close**.
9. Click **Done** to leave Application Composer.

Publish Your Sandbox

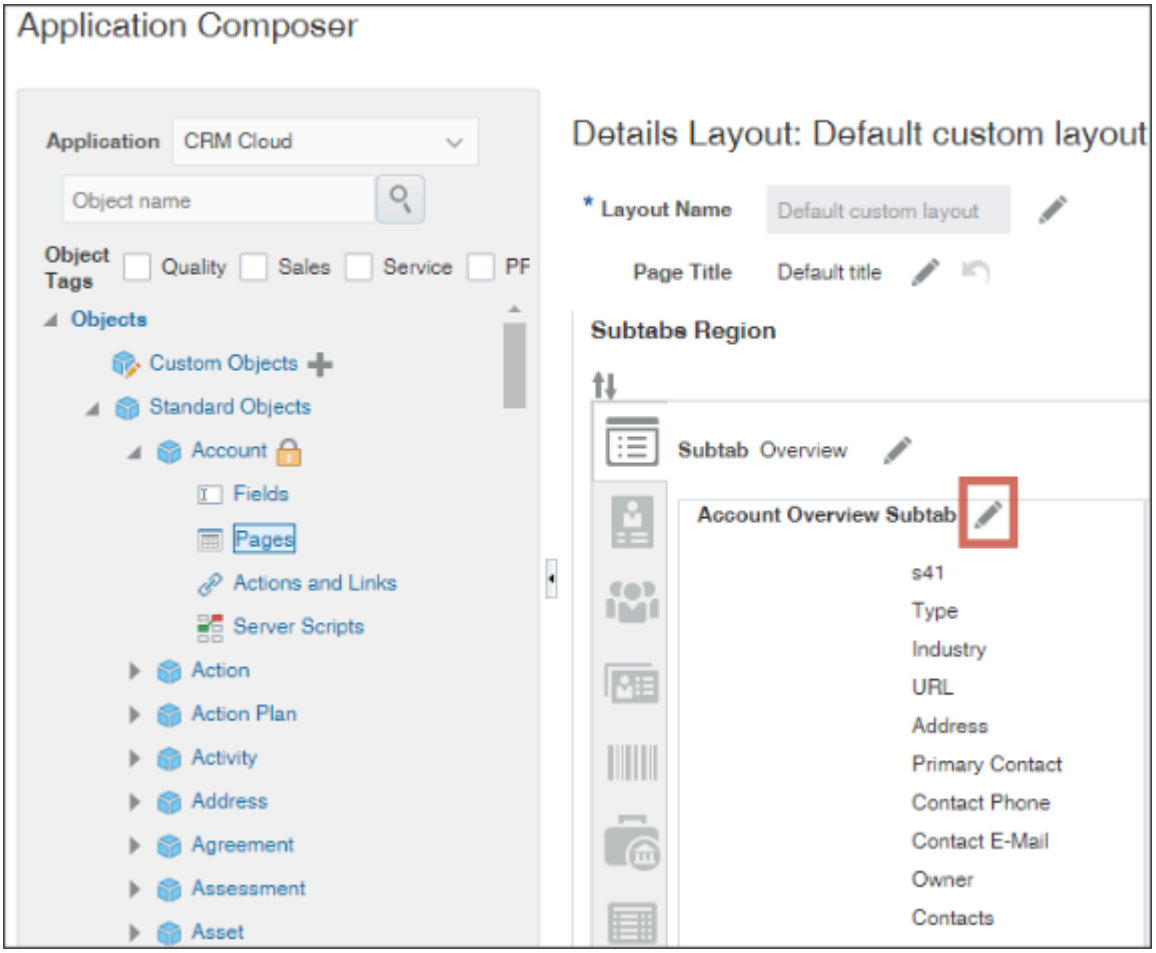
1. Click **Navigator** > **Configuration** > **Sandboxes**.
2. On the Sandboxes page, click the name of the sandbox.
3. Click **Publish**.
4. Click **Continue** to publish.
5. When the sandbox completes publishing, click **Done**.

Display the Account at the Top of the Account Hierarchy in the Account Overview Tab

You can make it easy for salespeople to see the top of the account hierarchy by exposing the Ultimate Parent field on the Edit Account Overview tab. If you don't expose this field, salespeople can still view the top account, but they must traverse the account hierarchy itself.

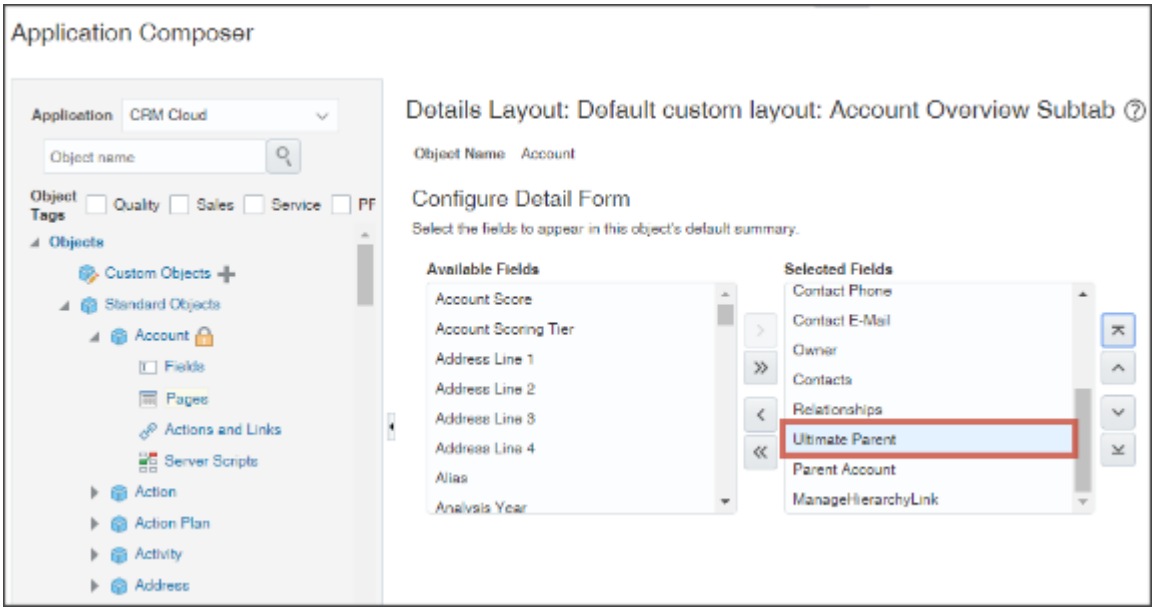
1. Create and enter a sandbox with Application Composer.
2. In the navigation tree, expand Standard Objects, and then expand Account
3. Click the **Pages** node.
4. Ensure that the **Application Pages** tab is selected.
5. In the Details Page Layouts region, open a custom layout or create a custom layout by duplicating the standard layout.

6. In the custom layout, click **Edit** (the pencil icon highlighted in the screenshot) for the Account Overview Subtab.



7. In the Configure Detail Form, select **Ultimate Parent** from the list of Available Fields and move it to the list of Selected Fields.

8. Move the field right above the Parent Account field.



9. Click **Save and Close**.
10. Click **Done**.
11. To test the changes, view the Account Overview page for an account.
12. Publish the sandbox.

Manage Address Types

You can specify what address types are used in your sales application by editing the lookup type Party Site Use Code (PARTY_SITE_USE_CODE).

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Manage Standard Lookups
2. On the Manage Standard Lookups page, search for the lookup type **PARTY_SITE_USE_CODE** or the meaning **Party Site Use Code**.
3. Your sales application uses only those values that are enabled and include the tag SALES_CLOUD.
   Here are the available values for sales:

Lookup Code	Meaning
BILL_TO	Bill to
SELL_TO	Sell to

Lookup Code	Meaning
SHIP_TO	Ship to

4. You can enable additional values for your sales application by entering SALES_CLOUD in the **Tag** field.
5. You can also create address types of your own using the **New** button.
6. Click **Save and Close**.

Related Topics

- Can I modify the phone types for accounts and contacts?

Show Account Invoices to the Sales Team

Let your sales team see the outstanding and paid invoices of accounts they handle. Enable the Invoices panel on an account foldout view so that invoices related to the account show up on the panel.

What You Need to Have Before Setting Up

- CX Sales and Oracle Financials integrated.
- The CX Sales accounts need to link to the financial billing accounts for the invoices to show up.

Setups Involved

- Add the AR_VIEW_RECEIVABLES_INVOICE_PRIV privilege to the sales administrator, sales manager, and sales representative roles, and assign users who need to see the invoices.
- Enable the Show Invoices checkbox in Smart Actions in Application Composer.
- Enable the Invoices Panel on an object's foldout view using the Visual Builder Studio.

Enable Show Invoices in Smart Actions

1. Enter an active sandbox and navigate to **Application Composer** > **Smart Actions**.
2. Search for **Show Invoices**.
3. Ensure that the **Enabled** checkbox for **Show Invoices** is selected.
4. Save your changes and publish the sandbox.

Enable the Invoices Panel on an Object's Foldout View Using Visual Builder Studio

1. Create a workspace in Visual Builder Studio.
   See "Create Your Own Workspace" in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative.

2. Sign in to the sales application and Visual Builder Studio simultaneously.
3. In Digital Sales, go to the foldout view of any account to add the Invoices panel.
4. On the Account foldout view, click your user name in the global header and select **Edit Page in Visual Builder**.
5. In the Visual Builder Studio, open the workspace you just created and click the **Source** icon on the navigation pane.
6. From Source, navigate to **extension 1** > **sources** > **self** > **applications** > **digital-sales** > **flows** > **mycustomers** > **pages** > **accounts-page.json**.
7. In the JSON tab, add the Invoices panel to the **displayProperties** list.
8. Click the **play** icon to see the preview of the account foldout view with the Invoices panel.
9. Click **Publish**.

   The Invoices panel appears on the account foldout view.

16 Import Accounts and Contacts

Overview of Account and Contact Import

Use the Excel macros provided by Oracle to import some of your existing sales data so that you can test your sales territory assignment and other features. You import accounts (including account hierarchies) and contacts in separate files, first the accounts, and then the contacts. You can import up to 5,000 records at a time, but you must ensure that each import completes before you start another.

Note: While you can import additional fields by appending columns to import macros, 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 your import tasks.

Step	Description	Navigation	Where to Get More Details
1.	From Oracle Support document 2229503.1, download to the same folder the Excel macros and .jar file required for import: • `oracle_ucm_client_11.1.1.jar` • Account Import Macro • Contact Import Macro • Address Import Macro	My Oracle Support	See the topic: *Download the Files for Account and Contact Import*
2.	If you're classifying the accounts by industry in your import, then you must obtain a list of the industry codes for the industry category you're using. You enter the codes along with your account data.	**Setup and Maintenance** > **Sales** > **Accounts and Contacts** > **Manage Classification Categories**	See the topic: *View the Industry Codes for Accounts*
3.	Import your accounts and account hierarchies.	Complete this step in the Account Import Macro	See the topic and video: *Import Accounts and Account Hierarchies Using the Account Import Macro*
4.	Import account contacts as well as stand-alone contacts.	Complete this step in the Contact Import Macro	See the topic: *Import Contacts*
5.	Import additional account and contact addresses. To view the additional addresses, you must have the multiple addresses regions exposed in the UI.	Complete this step in the Address Import Macro	See these topics: • *Import Additional Addresses* • *How can I enable multiple addresses for accounts?*

What You're Importing

What Information You Import for Accounts and Contacts

Importing account and contact data is a bit more complex than importing users or your sales catalog. That's because customer data, such as organizations, addresses, and contact points, are stored as different objects in the application.

Each object requires a unique ID for each record to identify it. You can use the IDs to relate the data you import. For example, your account import includes a unique ID for each organization. You can enter that unique ID into the contact import file to establish the relationship between the contact and the organization. The unique reference ID you add to each record also permits you to update the information later.

What You Import for Accounts

You use the account import macro to import basic information about the organizations you do business with:

- Organization name
- Account type
  The account can be of type customer or prospect. A customer is an account you have sold to in the past.
- Industry classification
- Account owner: the salesperson who owns the account
- Primary address
  You can import additional addresses for accounts using a separate macro.
- Phone
- Fax
- URL
- Parent account
  Importing the parent account for each account creates the account hierarchy.

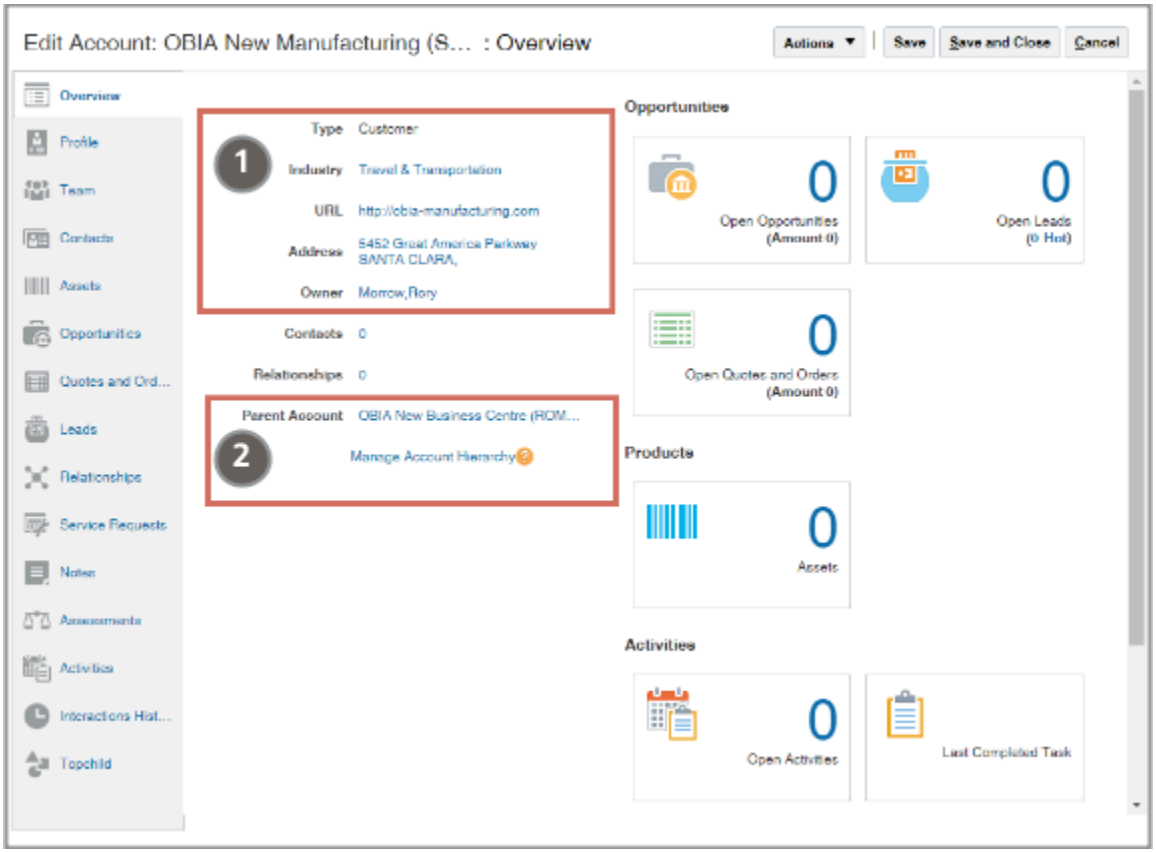
What you import is a subset of what's available on the Overview and Profile tabs of the Edit Account page. The tabs include other information that you must import separately:

- Attachments that you import as described in import guides
- Primary contact information that you can import using the contact import macro

Here's how the information you see in the Edit Account page Overview tab relates to what you import.

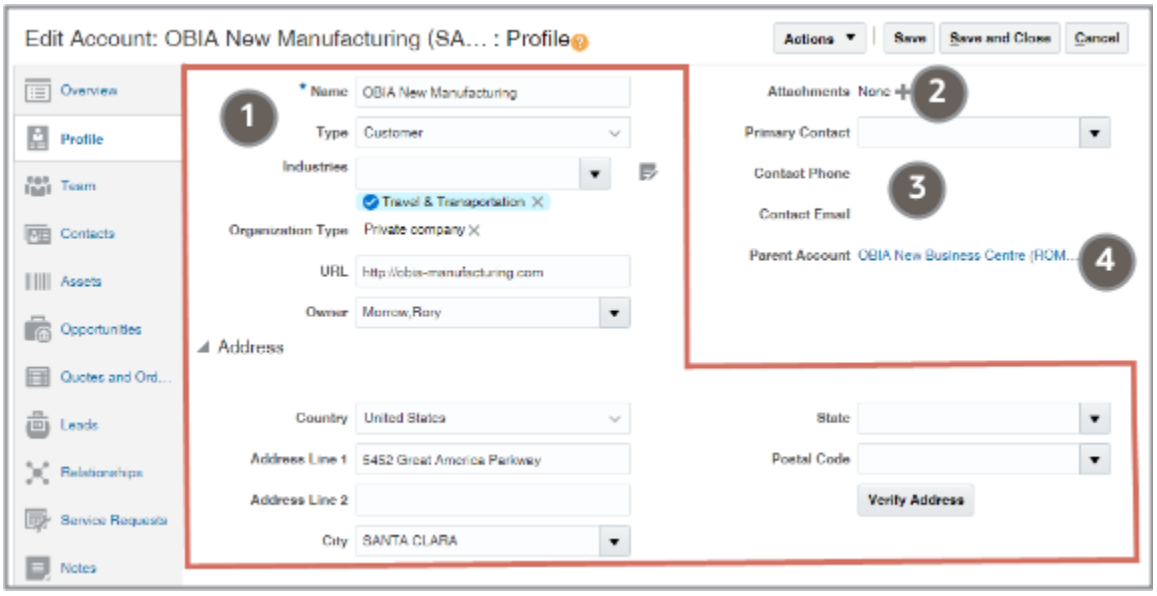
Callout Number	Description
1	You import the basic account information, including the primary address, using the account import macro.
2	You enter the parent account in the account import macro to create the account hierarchy.

Callout Number	Description



Here's how the information on the Edit Account Profile tab, relates to the information you import.

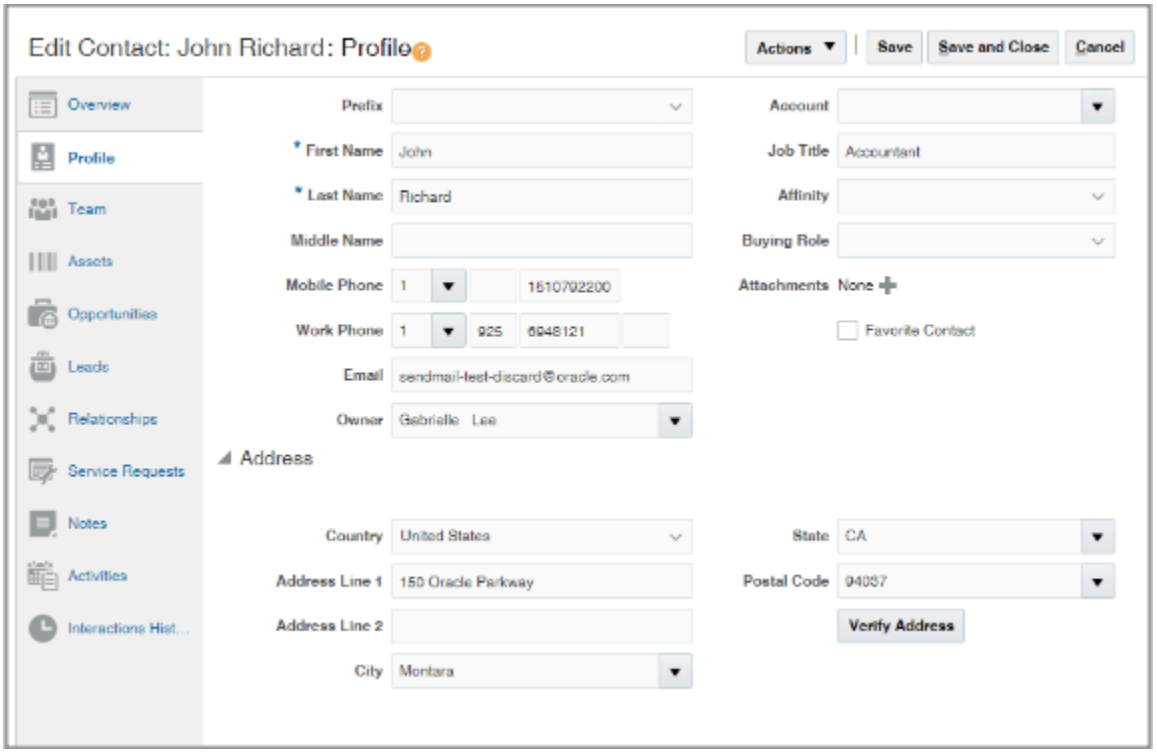
Callout Number	Description
1	The basic organization information and primary address you import using the account import macro.
2	Attachments you import separately. (no macro available)
3	Primary contact information imported using the contact import macro.
4	Parent account imported along with the account.



What You Import for Contacts

For contacts, you're importing all of the basic information displayed on the Profile tab of the Edit Contact page. This includes the name, the primary address, phone, and other contact information, as well as the contact owner and the account, if any. You can import multiple addresses for a contact using the separate address import macro.

Here's a screenshot of the Profile tab on the Edit Contact page.



Account Hierarchies

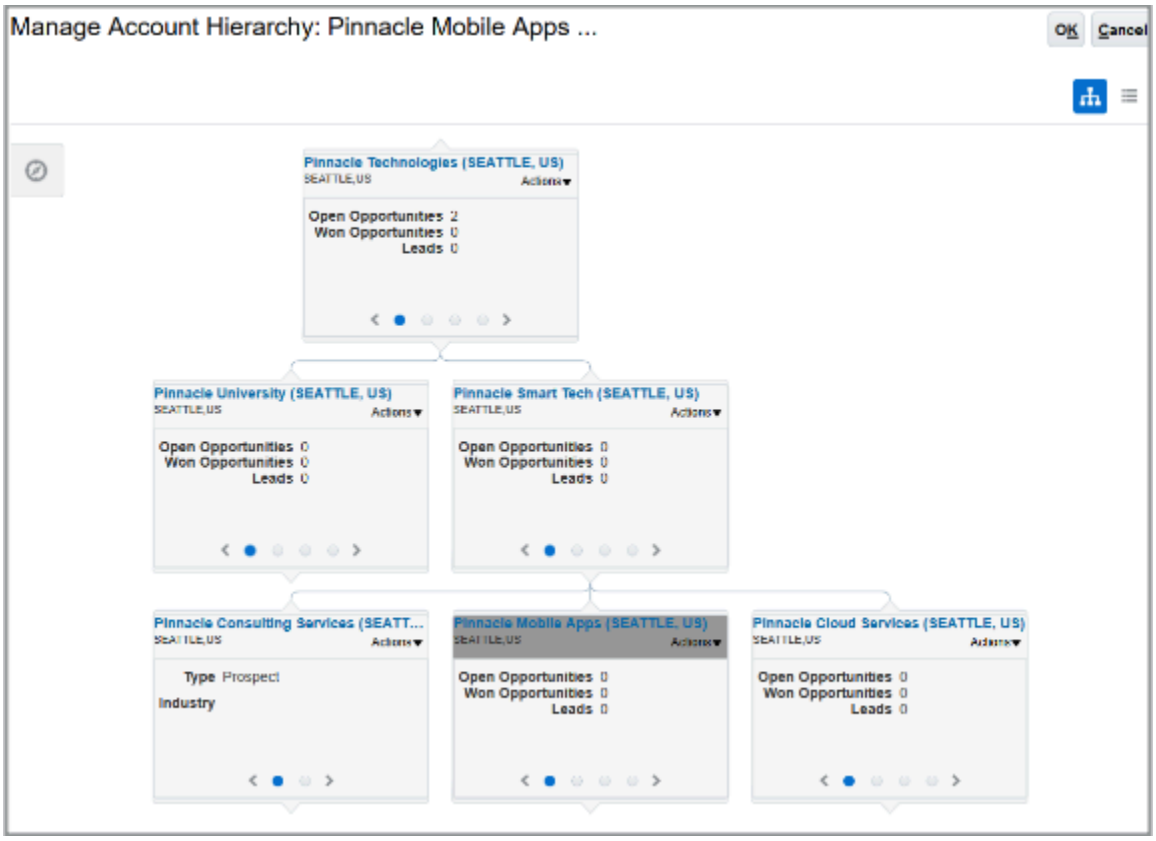
An account hierarchy provides salespeople a visual representation of relationships between accounts. You can use an account hierarchy to represent the structure of accounts in large customers and organizations with multiple layers. The hierarchy need not mirror the formal corporate structure, but can instead represent your organization's view of your customers. Each account in the hierarchy can have only one parent account.

Capturing account hierarchies can benefit the sales organization in a number of ways:

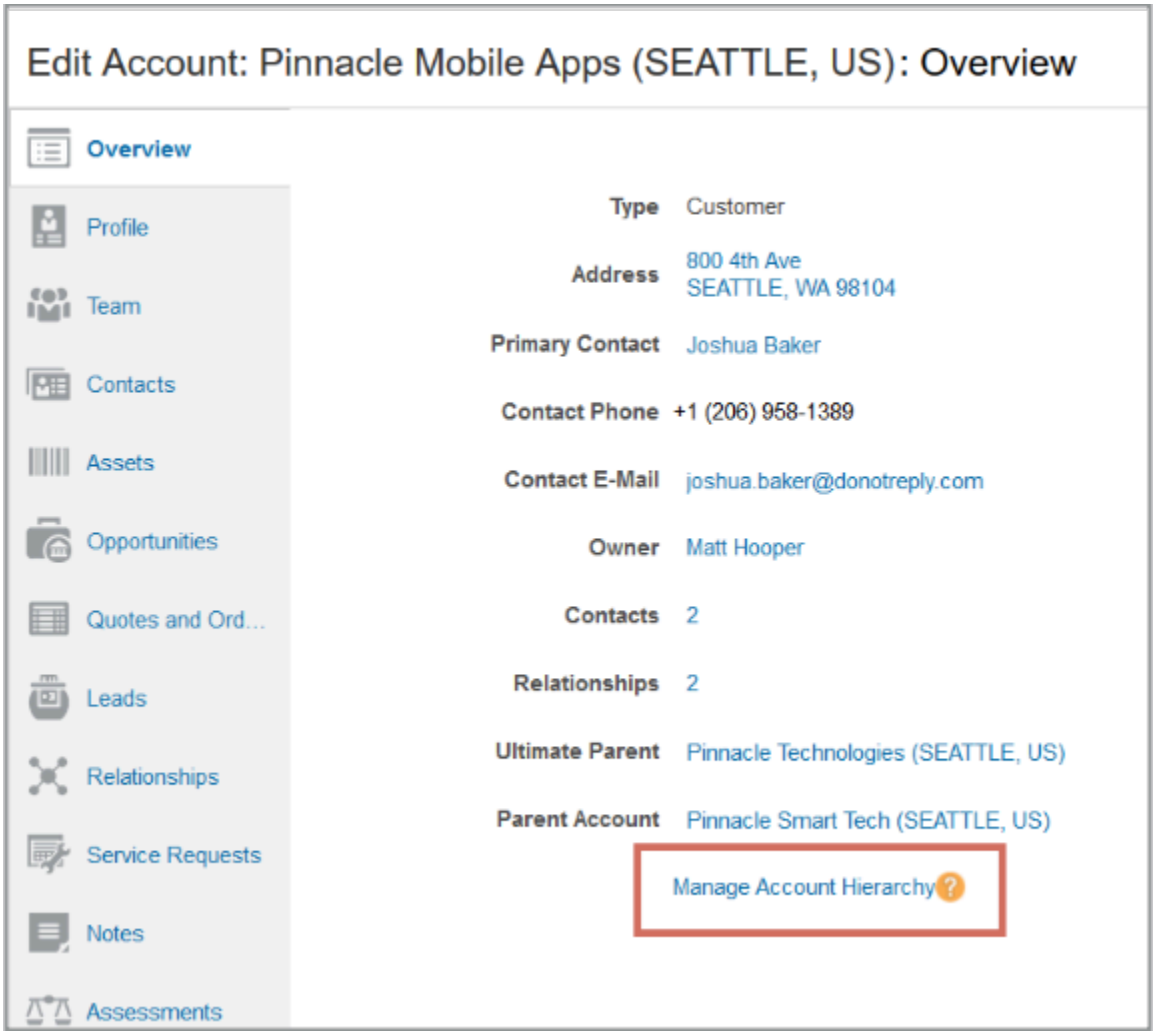
- Salespeople can use the hierarchy to see the position of their account in the hierarchy.
- You can create BI Publisher reports to show revenue for the hierarchy as a whole.
- You can use the hierarchy to provide key account directors and other select managers access to accounts and opportunities in the hierarchy that they can't access otherwise.

  Accounts for a large multinational corporation, for example, are typically assigned to sales teams in different countries or regions. Because managers in each region can only access information in their own region, no single manager can access all of the accounts and opportunities for the entire multinational. By including an account in the territory of a manager, you can provide that manager with edit access to all accounts and opportunities in the hierarchy below that account. If you include the top account in the territory, the manager gets edit access to all accounts. If you include an account in the middle of the hierarchy, the manager can access only those accounts in that particular branch.

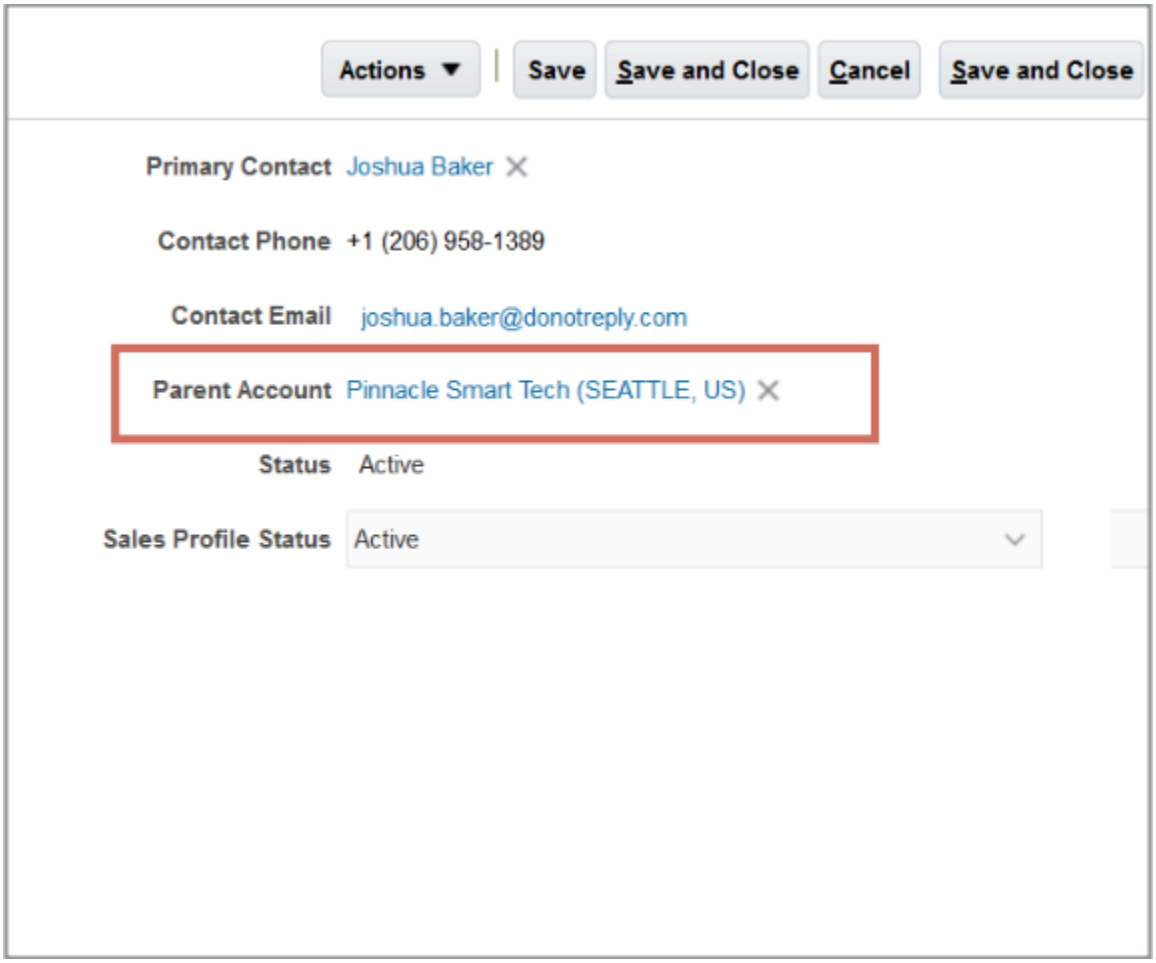
Here's a screenshot of the hierarchy of the fictitious Pinnacle Technologies company and its subsidiaries.



You can create and maintain the account hierarchy in the UI, by clicking the Manage Account Hierarchy link in the Edit Account page, Overview tab.



You can also build the hierarchy by entering the parent of an account on the Edit Account, Profile tab. Here's a screenshot of the portion of the tab, highlighting the Parent Account field.



Alternatively, you can import the hierarchy as described in this chapter.

Related Topics

Download the Files for Account and Contact Import

To import accounts and contacts requires you to use two or three different macros. You import the accounts first followed by their contacts. Importing the additional account addresses is optional. Here's how to download the files you need.

1. Sign in to My Oracle Support.
2. Search for the document Oracle CX Sales: Getting Started with Your Sales Implementation: Import Macros (Doc ID 2229503.1)

3. In the Details section of the document, locate the section appropriate to your application update, and download these files to the same folder on your computer. You can create different folders for the different macros provided that each folder includes the `.jar` file.

File Name	Description
`oracle_ucm_client_11.1.1.jar`	You must include this file in the same directory as the import macro.
Account Import Macro	The Excel macro that you populate with the account data
Contact Import Macro	The Excel macro that you populate with the contact data
Address Import Macro	Enables you to import additional addresses for both accounts and contacts. You must expose the multiple address region in the account and contact pages before you import.

View the Industry Codes for Accounts

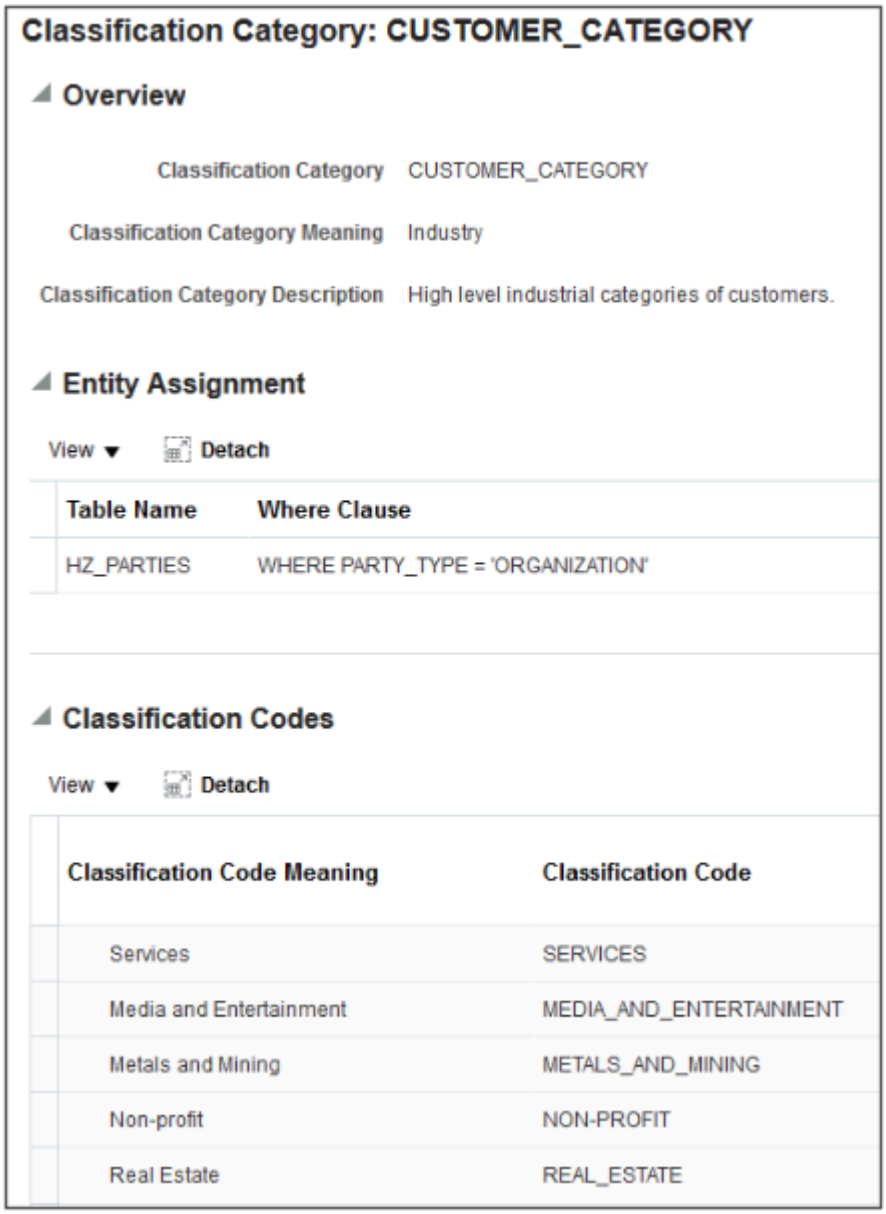
Here's how to find the account classification codes to use in the Industry Code column in the account import macro.

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Accounts and Contacts
    - Task: Manage Classification Categories
2. In the Search region of the Manage Classification Categories page, enter the classification category name in the **Classification Category** field. For the default category provided by Oracle, enter `CUSTOMER_CATEGORY`.
3. Click **Search**.

4. Click the classification category name.

   Use the classification codes listed in the Classification Code column on the page for entries in the import macro.

   Here's a screenshot of a part of the Classification Category page for the CUSTOMER_CATEGORY provided by Oracle.



5. Click **Done**.

Import Accounts and Account Hierarchies Using the Account Import Macro

Watch video

Here's how you populate the account import macro with your data and import. You can enter and import a maximum of 5,000 records at a time. You must wait until a previous import is complete before using the macro again.

Note: You can modify the macro to import additional fields, including any custom fields you created, using the Attributes Mapping worksheet in the macro.

1. Open the Account Import Macro.
2. If you receive a security warning that macros have been disabled, you must enable macros.
3. Click the **Resource EMail to ID Mapping** worksheet.
4. Click **Populate Resource Attributes from Server** to populate the worksheet with information about the resources who are the owners of the accounts you're importing.

   The Login window appears.
5. In the Login window, do the following:
   a. Enter the host name. The host name is in the portion of the URL between `https://` and `/sales`.
   b. Enter the user name and password.
   c. Click **Submit**.
6. If you're importing additional fields, including custom fields, then do the following:
   a. Click the **Attributes Mapping** worksheet.
   b. Click **Fetch Attributes from Server**.
   c. In an empty row in the worksheet, select the attribute from the Attribute Name column.
   d. Enter the name you want displayed as the column heading in the Account worksheet. This name displays only in the macro.
   e. Click **Update Headers** to add the column to the Account worksheet.
7. Click the **Account** worksheet, and enter the account data in the columns.

   The address you enter in the worksheet becomes the primary address for the account. If you create sales territories by address, the assignment process uses the primary address to assign territories.

Column	What to Enter
Account Number	Required unique ID for the organization. You can leave this field blank and generate the IDs later by clicking **Generate Account Number**.
Account Name	The name of the organization. Entry in this column is required.

Column	What to Enter
D-U-N-S number	The data universal numbering system (D-U-N-S) number from Dun & Bradstreet Corporation.
Account Type	Enter either ZCA_CUSTOMER or ZCA_PROSPECT. o ZCA_CUSTOMER for organizations you have sold to in the past. o ZCA_PROSPECT for potential customers. If an organization still requires qualification, then you should consider importing the record as a lead instead. If you leave this column blank, then the macro enters ZCA_PROSPECT.
Owner E-Mail	Enter the email address of the salesperson who is the account owner. The email address must be listed on the Resource EMail to ID Mapping worksheet. Entry in this column is required.
Address Number	A unique identifier for the address. If you leave this column blank, then the macro generates the number for you when you import. If you want to reuse an address from another account, then you can enter the address number from that address and skip the rest of the address fields.
Address 1	Enter the street address for the primary account address.
Address 2	Enter additional address information, such as the suite number.
City	City.
State	For the US, enter one of the two-letter state codes.
Postal Code	Postal code.
Country Code	The two-letter ISO code for a country. For example, enter US for the United States, and IN for India. Entry is required.
Address Type	Address types indicate how an address is used. For example, a customer gets billed at the bill-to address and receives the goods at the ship-to address. Address types are displayed only if you enable the display of multiple addresses for accounts. You can import any of the address type codes entered in the lookup type Party Site Use Code (PARTY_SITE_USE_CODE) with the tag SALES_CLOUD. By default, these are the codes available for import: o BILL_TO

Column	What to Enter
	○ SELL_TO ○ SHIP_TO The sales application by itself doesn't use the address type to drive any logic, but different applications you integrate may. By default, every account address you create in the application is set to the sell-to address.
Phone Country Code	Country code for the main phone for the organization.
Phone Number	Main phone number. No spaces or delimiters.
Fax Country Code	Fax number country code.
Fax Number	Fax number. No spaces or delimiters.
Email	Email address.
URL	The URL.
Industry Code	The industry code that you retrieved from the application for the classification category that you're using. You can obtain a list of the codes using the Manage Classification Categories task as described in the Viewing Classification Categories for Accounts topic.
Named Flag	A Y entry indicates the account is a named account. You can create special assignment for named accounts.
Parent Account Number	Enter the account number of a parent account to create an account hierarchy. You can copy over the IDs from the Account Number column.

8. In the account import macro, click **Create Import Activity**.
   The Login window is already populated with the information you provided earlier.
9. Click **Submit**.
10. Here's what to do if you're prompted to correct errors in your entries:
    a. Click **OK**
       The Error worksheet displays your errors.
    b. Click each error link in column D and make the correction on the Account worksheet.
       > **Note:** After you correct an error, you must click outside the field for the correction to be recognized.
    c. Click **Create Import Activity** and **Submit** again.

11. If the macro data is validated without errors, then the macro displays one of the following messages.

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

12. If your import activity was submitted successfully, then click **Activity Details**.
    The Activity Details window lists the import activity name, ID, and its status.
    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - A status of "Completed" means your import completed successfully.

Import Contacts

After the account import process completes, you can import the account contacts. You can import multiple contacts for each account, but you must specify one of the contacts as the primary contact. If you don't identify an account for a contact, the contact gets imported as a stand-alone contact. Using the macro, you can import up to 5,000 contacts at a time. You must ensure each import completes before starting another.

1. Open the Contact Import Macro.
2. Enable macros in Microsoft Excel, if required.
3. Select the **Resource EMail to ID Mapping** worksheet.
4. Click **Populate Resource Attributes from Server** to populate the worksheet with information about the resources you will assign as owners of the contacts you're importing. The contact owner is usually the resource who created the record. Owner entry is required.
5. Sign in on the Login window:
    a. Enter the host name. The host name is in the portion of the URL between `https://` and `/sales`.
    b. Enter the user name and password.
    c. Click **Submit**.

    The worksheet now includes both IDs and email addresses of the sales resources in your application. The email doesn't get imported; it just helps you enter the owner.
6. If you're importing additional fields, including custom fields, then do the following:
    a. Click the **Attributes Mapping** worksheet.
    b. Click **Fetch Attributes from Server**.
    c. In an empty row in the worksheet, select the attribute from the Attribute Name column.

d. Enter the name you want displayed as the column heading in the Contact worksheet. This name displays only in the macro.
e. Click **Update Headers** to add the column to the Contact worksheet.

7. Enter the contact information in the Contact worksheet. Here's a description of the columns:

Column	What to Enter
Contact Number	Unique ID for the contact. If you leave this required ID blank, the macro automatically generates it for you from the date and time when you import. The application uses the contact number to identify the contact for updates.
Prefix	Enter the contact name prefix. Here are the valid values: o DR. o MISS o MR. o MRS. o SIR
First Name	Contact first name. Entry is required.
Last Name	Contact last name. Entry is required.
Job Title	Contact job title.
Owner E-Mail	Enter the email of the account owner. The email must be one of the email addresses on the Resource EMail to ID Mapping worksheet. An owner is required for every record.
Work Phone Country Code	Country code for the work phone. If you import a work phone and no mobile phone, then the application displays the work phone as the primary phone in the contact and account UI.
Work Phone Number	Phone number without spaces.
Mobile Country Code	Country code for the contact's mobile phone number. If you import a mobile phone number, it automatically becomes the contact's primary number in the contact and account UI.
Mobile Number	Phone number without spaces.

Column	What to Enter
E-mail	Email address.
Address Number	If you don't have a unique ID to plug in this required field, you can leave it blank. The macro generates it for you automatically.
Address 1	Enter a street address unless you're using the account address.
Address 2	Second address line.
Address 3	This column is hidden in the macro.
City	City.
State	State.
Postal Code	ZIP or other postal code.
Country Code	Two-letter ISO country code. You must enter a country even if you don't enter an address.
Account Number	The account number links the contact to the account. Copy the account number for the contact's organization from the Account Number column in the account import macro file. If you leave this column blank, then the contact is imported as a standalone contact.
Primary Contact Flag	Each account must have one and only one primary contact. You must select **Y** for one of the contacts for each account. The other contacts must have a value of **N**.

8. Click **Create Import Activity**.

   The Login window appears already populated with the information you provided.
9. Click **Submit**.
10. If you're prompted to correct errors, here's what to do:

    a. Click **OK**

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

       Note: After you correct an error, you must click outside the field for the correction to be recognized.

    c. Click **Create Import Activity** and **Submit** again.

11. If the macro data is validated without errors, then the macro 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.
`Unable to submit the file import activity. Check log for details.`	You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.

12. If your import activity was submitted successfully, then click **Activity Details**.

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

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is `Completed`.

13. Optionally, click **Generate Log** to save a file listing the contacts that were imported.

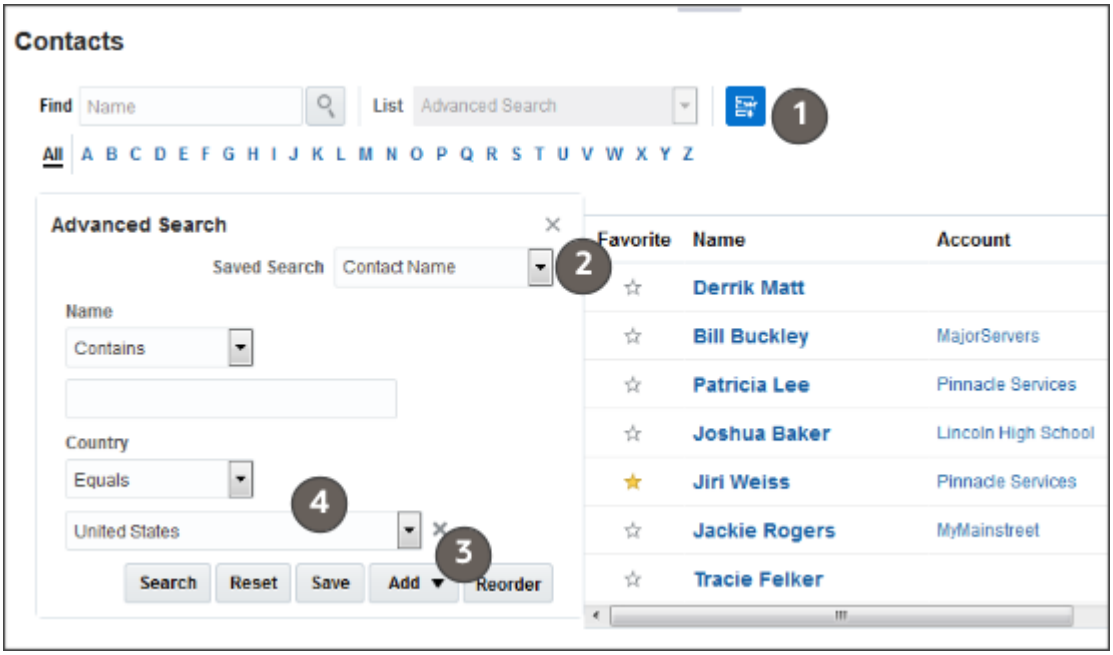
Validate the Imported Contacts

You can validate the imported contacts either in the Contacts work area or in Workspace. Here's how to do it in the Contacts work area.

You can view the primary contacts of the accounts you imported from the list of accounts. Here's another way that you can view a list of contacts for the country you imported:

1. Make sure that you're signed in as a sales administrator in the sales organization. Sales administrators have broad access to sales data.
2. Open the **Contacts** work area.

3. Click **Advanced Search** (the filter icon, callout 1 in the screenshot) to open the Advanced Search panel.



4. From the **Saved Search** list select **Contact Name** (callout 2).
5. Add United States or the country you imported as an additional filter:
    a. Click **Add** (callout 3) and select **Country**.
    b. Enter the country (callout 4).
6. Click **Search**.

Import Additional Addresses

Here's how to import additional addresses for accounts and for contacts using the address macro. You must expose the multiple addresses section in the UI to view them.

1. Open the Address Import Macro.
2. If you receive a security warning that macros have been disabled, you must enable macros.
3. Review the attributes available for import on the Address worksheet. If you need to import additional address attributes, then do the following:
    a. Click the **Attributes Mapping** worksheet.
    b. Click **Fetch Attributes from Server**.
    c. In an empty row in the worksheet, select the attribute from the Attribute Name column.
    d. Enter the name you want displayed as the column heading in the Address worksheet. This name displays only in the macro.
    e. Click **Update Headers** to add the column to the Address worksheet..
4. Enter the address data on the Address worksheet.

    Here's a description of the available columns.

Column	What to Enter
Address Number	A unique identifier for the address. If you leave this column blank, then the macro generates the number for you.
Address 1	Enter the street address for the primary account address.
Address 2	Enter additional address information, such as the suite number.
City	City.
State	For the US, enter one of the two-letter state codes.
Postal Code	Postal code.
Country Code	The two-letter ISO code for a country. For example, enter US for the United States, and IN for India. Entry is required.
Address Type	Address types indicate how an address is used. For example, a customer gets billed at the bill-to address and receives the goods at the ship-to address. Address types are displayed only if you enable the display of multiple addresses for accounts. You can import any of the address type codes entered in the lookup type Party Site Use Code (PARTY_SITE_USE_CODE) with the tag SALES_CLOUD. By default, these are the codes available for import: o BILL_TO o SELL_TO o SHIP_TO The sales application by itself doesn't use the address type to drive any logic, but different applications you integrate may. By default, every account address you create in the application is set to the sell-to address.
Associated Party Number	Copy the account or contact number from the appropriate macro to link the address.

5. Import the additional addresses. The process is the same for all the macros:

    a. Click **Create Import Activity** and sign in.
    b. If you get errors, correct them and import again.
    c. If your import activity was submitted successfully, then click **Activity Details**.

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

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - A status of "Completed" means your import completed successfully.

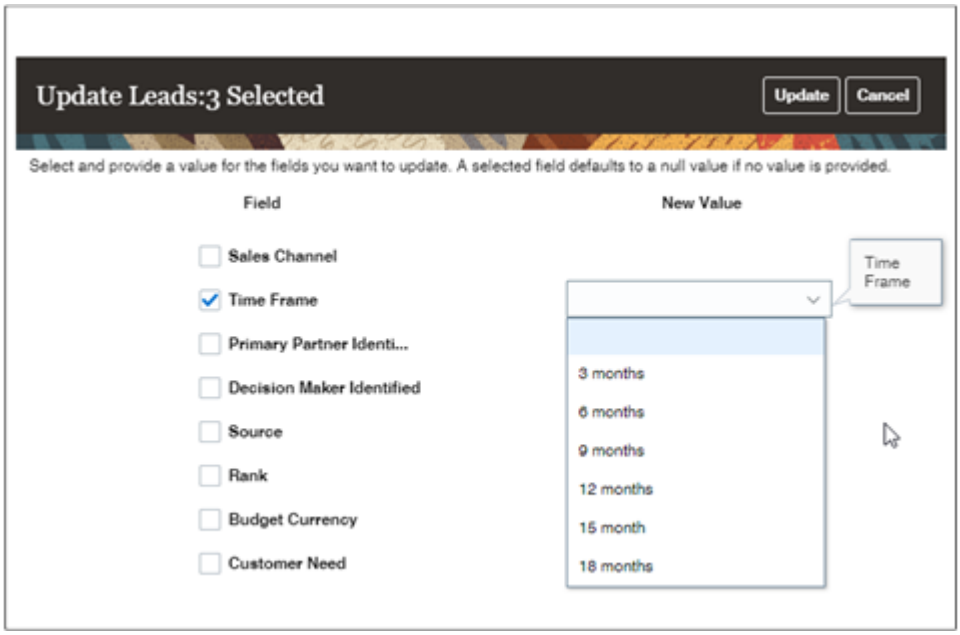
17 Mass Update and Inline Editing

Mass Update

With mass update , salespeople can update fields on multiple records at the same time with a few clicks. No need to drill into and edit each record individually. In Digital Sales UIs, this feature is available by default. In CX Sales, you must complete the updates listed in this chapter.

In CX Sales UI's Workspace and in the new work areas that use Adaptive Search, updating ownership and status of multiple leads is as simple as selecting the leads in the landing page list, right-clicking, and selecting the **Update** action.

Salespeople get a list of fields they can update such as the one shown in the screenshot.



Mass update is also available in the CX Sales UI legacy work areas that haven't been converted to Adaptive Search, including Business Plans, Competitors, Service Requests, and Products. Because these work areas use the older CRM Search technology, you must set these up separately. Inline editing is available only in these legacy work areas.

Note: Mass update isn't available for dynamic choice list (DCL) fields with dynamic filters.

Setup Overview

Here's how to enable mass update and inline editing in CX Sales UIs.

Step	Applies To	Description	Navigation	Where to Get More Details
1	CX Sales	Enable mass update of records in Workspace and the new single-object work areas, including Accounts, Contacts, Leads, and Opportunities.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Configure Adaptive Search** > **Parameters**	See the topic: *Enable Mass Update*
2	CX Sales	Optionally, enable mass update of records in the work areas that haven't yet been converted to the new Adaptive Search technology. You can do this by adding the Update action to a custom layout of the landing page in Application Composer. You can also specify the maximum number of records users can update in a profile option.	• **Navigator** > **Configuration** > **Application Composer** • **Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Administrator Profile Values**	See the topics in the section Inline Editing in Legacy Work Areas: • *Enable the Mass Update Action* • *Enable Inline Editing of Records Displayed in Lists*
3	CX Sales	Optionally, you enable the inline editing in the legacy work areas, by setting the profile option Click-to-Edit on Landing Page Enabled to Yes.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Administrator Profile Values**	See the topic: *Enable Inline Editing of Records Displayed in Lists*

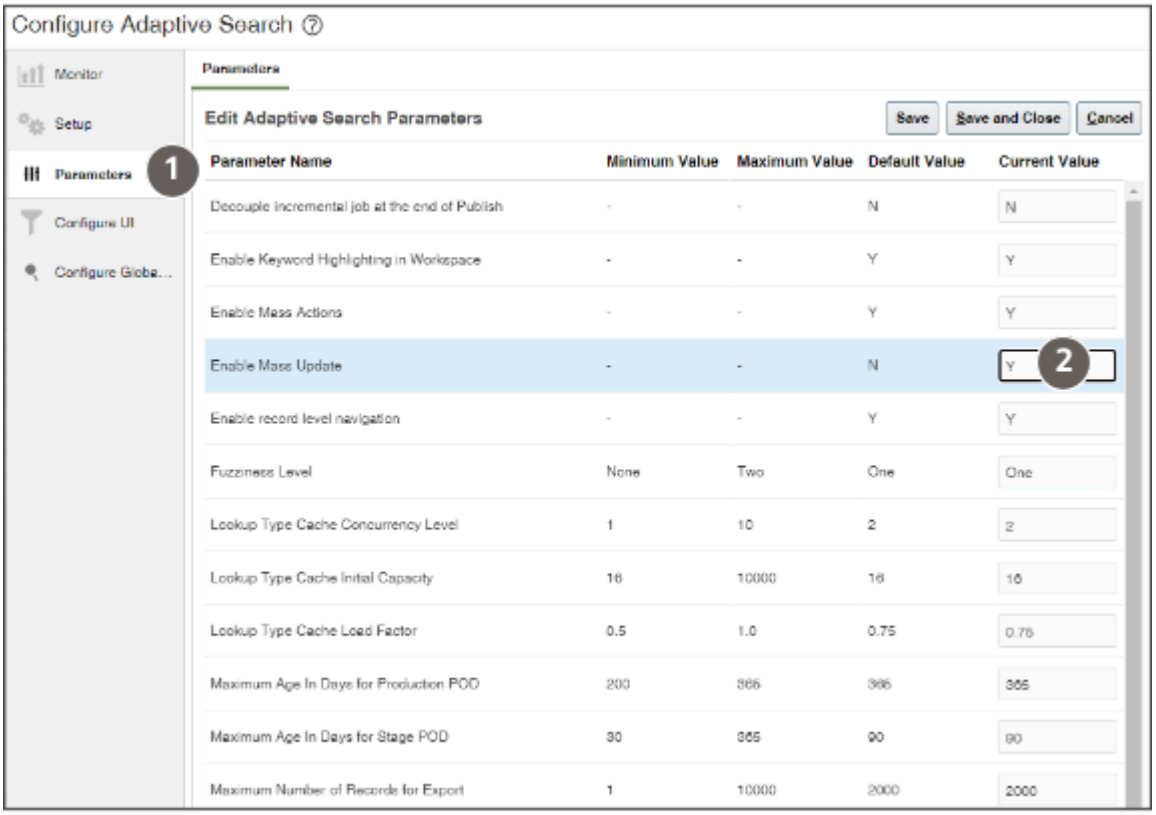
Enable Mass Update

Here's how to make it possible for salespeople to update multiple records at the same time while using Workspace, Accounts, Contacts, Leads, Opportunities, and the other work areas in CX Sales that now use Adaptive Search.

1. Navigate to the Setup and Maintenance work area, open the **Configure Adaptive Search** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Show: All Tasks
    - Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, click **Parameters** (callout 1).

3. Click **Edit**.

   Here's a screenshot of the page after you click Edit.



4. In the **Enable Mass Update** row, **Current Value** column, enter `Y` (callout 2).
5. Click **Save and Close**.

Enable Mass Update and Inline Editing in Legacy Work Areas

Enable the Mass Update Action

You enable mass update for the legacy work areas that still haven't been updated to behave like Workspace, by creating a custom layout of the landing page in Application Composer. Within the layout, you specify which fields users can update.

Create and Activate a Sandbox

1. Click **Navigator** > **Configuration** > **Sandboxes**.
2. On the Sandboxes page, click **Create Sandbox**.
3. Enter a name for your sandbox.

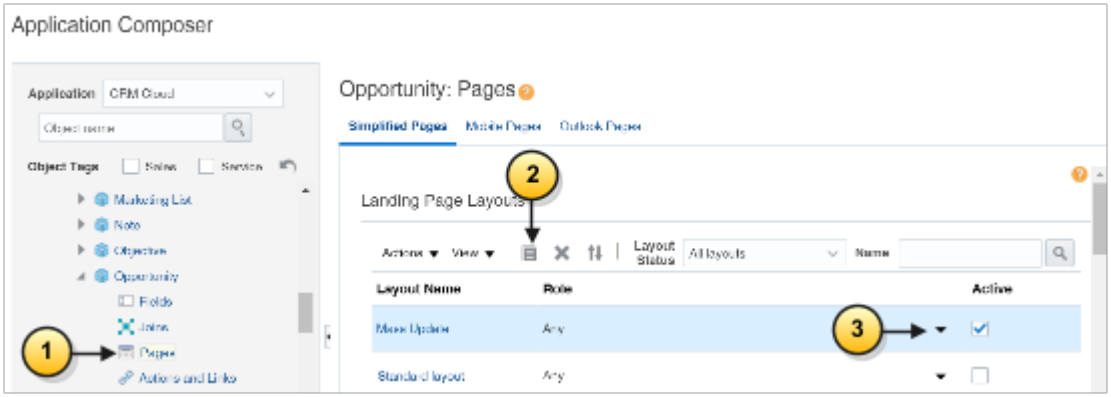
4. In the All Tools section, select **Application Composer** as the tool you want to activate for this sandbox.
5. Click **Create and Enter** to create and enter the sandbox.

The application displays a bar at the top of the page with the sandbox name.

Enable the Update Action and Specify the Fields in a Custom Layout

1. Open Application Composer, **Navigator** > **Configuration** > **Application Composer**.
2. In the navigation tree, expand **Standard Objects**, and then expand the object you want to modify. For example, expand the **Opportunity** object.
3. Within the object you're modifying, click the **Pages** node.
4. Ensure that the **Simplified Pages** tab is selected.
5. In the Landing Page Layouts region, select the Standard Layout and click **Duplicate Landing Page Layout** (the document icon).
6. In the Duplicate Layout window, enter a name for your layout. The Standard Layout is the source.
7. Click **Save and Edit**.
   Notice that your new layout is now active. The Standard Layout you copied is inactive.
   Here's a screenshot of Application Composer showing the Opportunity: Pages region. Callouts highlight some of the features.

Callout Number	Description
1	Pages node
2	Duplicate Landing Page Layout button
3	Role Name (down arrow icon) that you use to specify job roles that see the layout.



8. Edit the new layout to add the Update action and select the fields that users can update. Here are the steps for the Opportunities landing page:
   a. Click **Edit** (the pencil icon) on the **Fuse Opportunity Overview Table**.
   b. Navigate to the Configure Detail Form: Buttons and Actions region.
   c. In the Available Actions window, move the **Update** action to the Selected Actions pane. You can either double-click or use the arrow buttons.

d. Scroll down to the Configure Mass Update Fields region.
e. Move the fields you want users to update to the Selected Fields column.

> **Tip:** If entry in a field depends on the value of another field, you must expose both fields. For example, users can't enter a sales stage unless they select the sales method first.

f. Click **Save and Close**, then **Done**.

9. By default, your custom layout is available to everyone. Here's how to restrict use of layout to specific job roles:

a. Select the layout and click **Role Name** (the down arrow icon).
b. In the Select: Roles window, click **Show available predefined roles** and **Specific Roles**.
c. Move the job roles to the Selected Roles column and click **OK**.

Test and Publish the Sandbox

Test your new layout in the work area where you enabled it and publish the sandbox.

1. Click on the sandbox name in the sandbox toolbar and select **Publish**.
2. Click **OK** in the dialog box to navigate to the Sandbox Detail page.
3. In the Sandbox Detail page, click **Publish** again.
4. Click **Continue to Publish** in the warning message to confirm that you want to publish.

Specify the Maximum Number or Records Users Can Update at the Same Time

You can specify the maximum records users can update at the same time in the legacy work areas by setting two profile options.

Note the following:

- By default, users can update a maximum of 25 records at the same time.
- The maximum number of records you can update is 500.
- For custom objects, the maximum number is set to 25 records. You cannot change this number.

Application Object	Profile Option
Activities	Activity Mass Update Threshold Value (ZMM_MASS_UPDATE_THRESHOLD)
• Accounts • Assets • Contacts • Leads • Opportunities	Mass Update Threshold Value (ZBS_MASS_UPDATE_THRESHOLD)

Set the Profile Options

Here's how to set the profile options:

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. In the Manage Administrator Profile Values page, search by the profile option name or code.
3. Click the profile option name link.
4. Set the profile option value.
5. Save your changes.

Enable Inline Editing of Records Displayed in Lists

Enabling inline editing of records in landing page lists saves the extra clicks it takes to drill down into individual records. Inline editing is available in the legacy work areas.

You enable the feature by setting the system profile option Click-to-Edit on Landing Page Enabled.

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option code name ZBS_ENABLE_CLICK_TO_EDIT in the **Profile Option Code** field.
3. Click **Search**.
4. Click on the profile option name in the search results.
5. Set the profile option value to Yes.
6. Click **Save and Close**.

18 Sales Dashboard

Overview of the Sales Dashboard

A sales dashboard is a visual representation of key sales performance metrics and KPIs (Key Performance Indicators) designed to provide a quick and easy-to-understand overview of a sales team's performance.

Salespeople and sales managers can use the Sales Dashboard to review items that need their immediate attention, including upcoming appointments and tasks. The dashboard can also display tables of information and visualizations from OTBI and from shared saved searches.

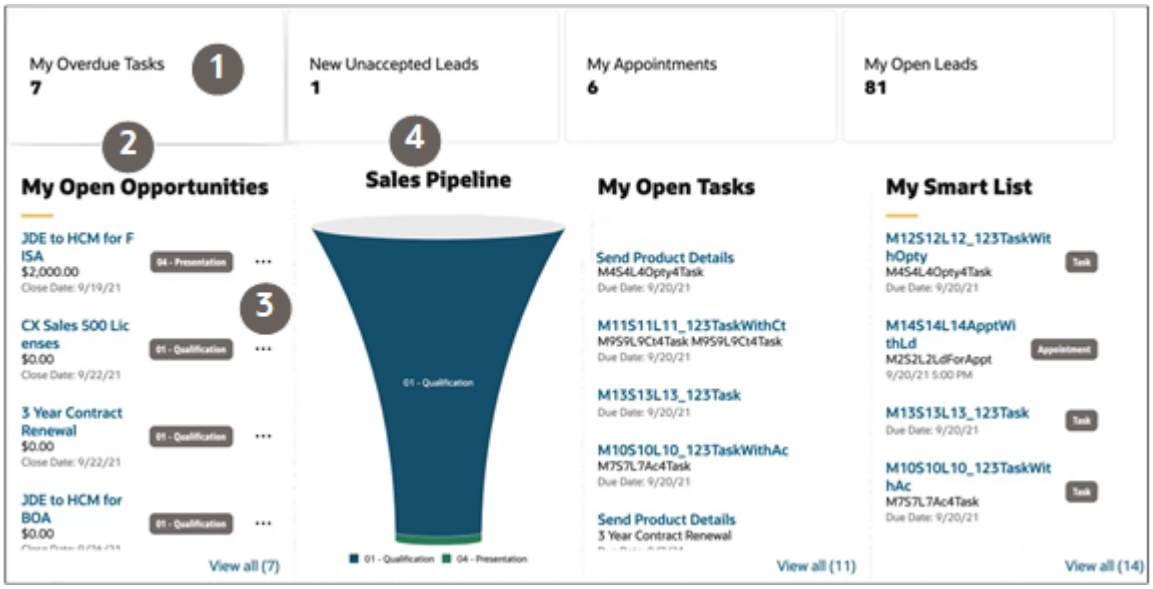
Oracle delivers two Sales Dashboards: one for the sales representative and one for the sales manager.

As an administrator, you can use Oracle Visual Builder Studio to configure each version of the Sales Dashboard to meet your requirements.

Here's an example of what a salesperson sees in the Sales Dashboard provided by Oracle:

- The tiles at the top of the page, called Metric Cards (or Attention Tiles), display the number of important work items in the list generated from a saved search. For example, the My Overdue Tasks tile shows the number of overdue tasks a salesperson owns (callout 1 in the screenshot). Clicking on a tile displays the list.
- The bottom section of the salesperson dashboard displays a list or graphical representations, called visualizations:
    - My Open Opportunities (callout 2) lists opportunities that are closing soon. The list is generated from a saved search with the same name. Salespeople can take an action on an item in the list by clicking **Actions** (the three dot icon, callout 3), or they can click **View all** to see the complete list of open opportunities.

      The layout of My Open Opportunities and other sections of the Sales Dashboard are saved as templates that you can copy and use to display other saved searches in a similar way.
    - Sales Pipeline (callout 4) displays a visualization of a salesperson's pipeline by sales stage. Click the opportunity stages to get a list of opportunities at each stage. The data for the visualization comes from an Oracle Analytics Cloud analysis.
    - My List shows accounts, contacts, leads, and opportunities that were recently accessed by the salesperson or are associated with an activity. Items accessed more often get higher priority on the list.



What You Can Modify

The Sales Dashboard displays content in individual sections, or logical regions of the page. Each section maps to a template, which defines the content displayed within that section.

In VB Studio, there are four types of templates you can use to display both preconfigured and custom saved searches:

- Attention Tile (also called a Metric Card)

  A tile that displays the name of the saved search and the number of items in the list of results. Clicking on the tile displays the list.

- List

  Displays data as a single-column a list.

- Table

  Displays data in a table with multiple columns.

- Visualizations

  Displays data as a visualization.

To display visualizations created from saved searches and reports, you use the Chart template type.

Digital Sales delivers a predefined set of visualizations that you can add to a dashboard. Or you can create your own custom visualizations using the Visualization Configurations page. See the topic *Create Visualizations*. (You can add the same visualizations to both the Sales Dashboard and to CX Sales Mobile layouts.)

For each dashboard, you can:

- Add and remove existing templates, and change their display order.
- Create new templates.
- Add visualizations you created from saved searches or from Oracle Analytics Cloud analyses.

Sales Representative and Sales Manager Dashboards

Let's look at the templates that are preconfigured for each version of the Sales Dashboard.

The dashboard for the sales representative includes these templates:

- Attention Tile for Sales Representative
- My Appointments Table
- My Open Opportunities List
- Sales Pipeline Chart
- My Open Tasks List
- My List

The dashboard for the sales manager includes these templates:

- Attention Tile for Sales Manager
- My Appointments Table
- All Opportunities List
- My Team's Pipeline Chart
- My Team's Performance Chart
- My Team's Deal Size Chart

Digital Sales also delivers a default Sales Dashboard. If the user isn't a sales representative or sales manager with the right roles, then the default Sales Dashboard displays at runtime. The default dashboard includes these templates:

- Attention Tile for Sales Representative
- My Appointments Table
- My Open Leads List
- Sales Pipeline Chart
- My Open Tasks List
- My List

Complete List of Sales Dashboard Templates

Digital Sales delivers the below templates already configured for the Sales Dashboard. You can add these templates to any custom Sales Dashboard layout.

Template Type	Template Name
Attention Tile	• Attention Tile for Inside Sales Manager • Attention Tile for Sales Representative • Default Attention Tile • Template for Aggregates
Lists	• All Accounts List • All Contacts List

Template Type	Template Name
	• All Opportunities List • My Open Leads List • My Open Opportunities List • My Open Tasks List • My List • My Team's Opportunities List • Template for List
Table	• My Appointments Table • Template for Table
Visualizations	• My Earnings by Period • My Team's Deal Size Chart • My Team's Leads Size Chart • My Team's Performance Chart • My Team's Pipeline Chart • Sales Pipeline Chart • Template for Chart

Overview of Sales Dashboard Setup

Here's an overview of the steps you can use to configure the Sales Dashboard. It also lists the steps to enable access to the dashboard from Digital Sales.

Here's how you enable access to the Sales Dashboard from the Navigator:

1. Navigate to **Configuration** > **Sandboxes**.
2. Click **Create Sandbox** and enter a new sandbox with **Structure** enabled.
3. From **Tools,** select **Structure** to open the Structure page.
4. Locate and select the Sales Dashboard entry in the Navigation Configuration tab of the Structure tool.
5. Publish the sandbox by clicking the sandbox name and **Publish**.

Once the Sales Dashboard is enabled, you can access it from the Navigator by selecting Sales Dashboard. Alternatively, it can also be accessed via the Springboard.

Here's an overview of the steps you can use to configure the Sales Dashboard.

Step	Description	Navigation	Where to Get More Details
1	Duplicate the predefined dashboard layout that you want to configure in VB Studio. There are two predefined layouts: one for the	VB Studio	See the topic *Duplicate the Predefined Sales Dashboard Layout* in this chapter.

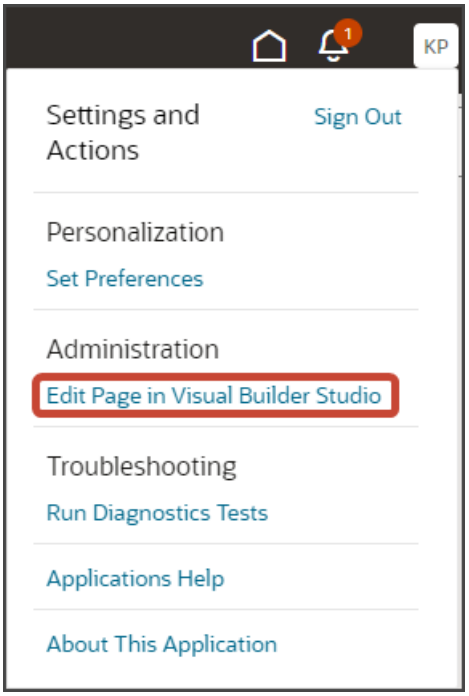
Step	Description	Navigation	Where to Get More Details
	sales representatives and one for sales managers.		
2	Add predefined or custom saved searches as metric cards (the tiles along the top), lists, or tables. The different elements of the dashboard provided by Oracle are saved as templates that you can copy and reuse.	VB Studio	See the topics: • *Add a Predefined Saved Search to the Sales Dashboard* • *Add a Custom Saved Search to the Sales Dashboard* • *Metric Cards and Badges* • *Configure Metric Card Badges and Descriptions*
3	You can add badges to the metric cards that warn users when certain conditions are met. For example, the My Overdue Tasks metric card provided by Oracle displays a warning badge if a user has 5 or more overdue tasks and a critical badge if there are 10 or more.	VB Studio	See the topics: • *Metric Cards and Badges* • *Configure Metric Card Badges and Descriptions*
4	Add any visualizations (charts) for saved searches or for Oracle Analytic Cloud analyses.	VB Studio	See the topic: *Add a Visualization to the Sales Dashboard*

Duplicate the Predefined Sales Dashboard Layout

You must duplicate the predefined Sales Dashboard layout, so you can make changes.

1. In your sales application, navigate to the Sales Dashboard.

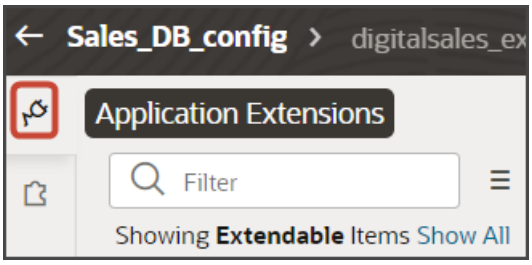
2. Under the Settings and Actions menu, select **Edit Page in Visual Builder Studio**.



3. Select the project that's already set up for you. If only one project exists, then you will automatically land in that project.
4. If you're working in an active sandbox when you launch Visual Builder Studio from Digital Sales, then Visual Builder Studio looks for a workspace that's associated with your sandbox. If you're not working in a sandbox when you launch Visual Builder Studio, then Visual Builder Studio looks for a workspace without a sandbox. You might have to select a workspace if more than one workspace exists. If no workspace exists, then Visual Builder Studio automatically creates one for you.
5. When you enter into your workspace in Visual Builder Studio, you land on the Page Designer. This is where you create your application extension.

   The Sales Dashboard is displayed in the main design area called the canvas.

   > **Tip:** To display more of the dashboard, collapse the left pane by clicking the App UIs tab on the left. Then, select **Wide screen** from the list along the top of the Page Designer.



6. On the Properties pane, click the Default Rule set link.

   The default rule set contains the page layouts that are available for the Sales Dashboard, one for the sales representative and one for the sales manager. There's also a default layout for those users who might not have the right roles. Each layout is read-only. To make changes to a layout, you must first duplicate it. In this case, we want to change the dashboard for the sales representative.

7. Scroll down to the **Representative** layout.

   Note the two icons: **Layout Preview** and **Duplicate**.

   - Click the **Duplicate** icon to make a copy of the layout that you can then configure.
   - Click the **Layout Preview** icon to view the template layout in the canvas. This lets you easily toggle between layouts.
8. Click the **Duplicate** icon.

   Visual Builder Studio makes a copy of the layout named **Representative (Copy)**.
9. In the **Representative (Copy)** layout, review the layout's condition to ensure that the correct role is specified for this layout.

   You're now ready to make changes to the dashboard layout.

Add a Predefined Saved Search to the Sales Dashboard

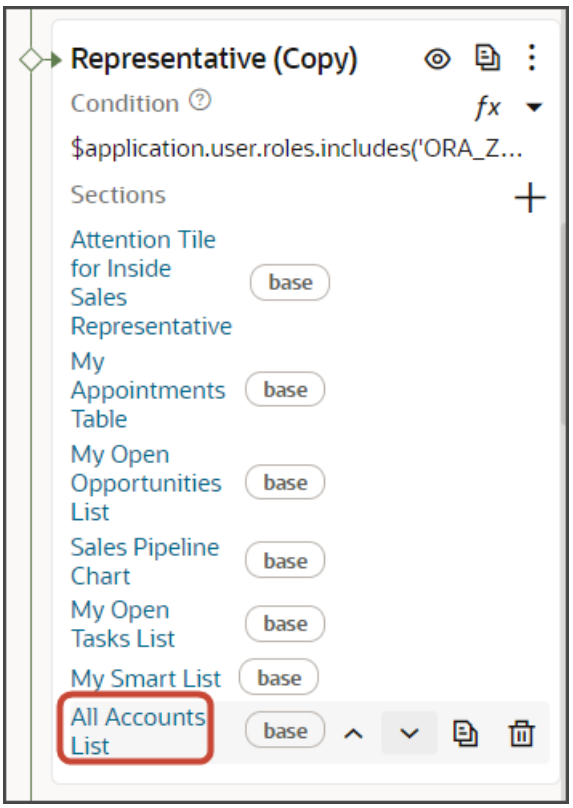
Here's how to add one of the saved searches predefined by Oracle to the Sales Dashboard. In this example, we're adding the All Accounts saved search to the Sales Dashboard for sales representatives.

> **Note:** To learn how to display a custom saved search on the dashboard, see the topic "*Add a Custom Saved Search to the Sales Dashboard* The instructions are the same with some minor differences.

To add a predefined (also known as "base") list template to a Sales Dashboard layout:

1. On the Properties pane for the Representative (Copy) layout, click the **+** Add Section icon.

2. Click **All Accounts List**.
   The newly added All Accounts List is added at the bottom of the layout. You can change the order the sections are displayed. Just use the Move Up and Move Down arrows in the Sections region.



3. To remove a section from the dashboard layout, click the Delete icon next to the section that you want to remove.
4. Click the Preview button to see your changes in your runtime test environment.



Add a Custom Saved Search to the Sales Dashboard

Here's how to display a custom saved search on the Sales Dashboard for sales managers either as a table or a list.

> **Note:** This example explains how to add a custom saved search or smart list to the dashboard layout as a table. To display a list, the instructions are the same except for some minor differences, which are noted in step 13.

Prerequisites

1. Create the custom saved search and share it with the job roles who view the dashboard. *Create Saved Searches for the Sales Organization*.

2. Display the saved search and copy its UUID. The UUID is displayed in the saved search page's URL.



You will use the UUID when adding the table to the Sales Dashboard in Visual Builder Studio.

Display the Custom Saved Search as a Table in the Sales Dashboard

1. Let's configure a dashboard layout for a manager.

   On the Properties pane for the Manager (Copy) layout, review the layout's condition to ensure that the correct role is specified for this layout.
2. Click the **+** Add Section icon > **+ New Section**.
3. In the Create Section dialog, enter a title, `My Open Leads < 10K`, and click **OK**.

   > **Note:** The title is the name of the template, not how the template will appear at runtime on the dashboard. The runtime title comes from the saved search.

   The newly added section is added to the bottom of the layout. Use the Move Up arrow to move the new section to the desired location.
4. Click the **My Open Leads < 10K** link.

   The template editor opens.
5. Click the Code button.



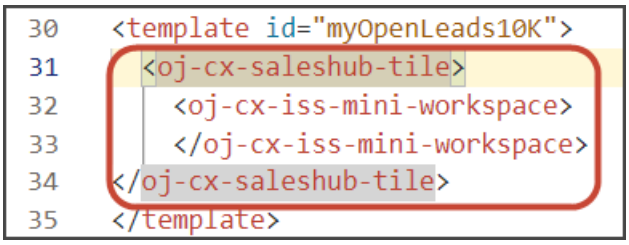
Your new **My Open Leads < 10K** section displays with empty placeholder `template` tags.



6. For a table, enter this code between the existing placeholder `template` tags.

```
<oj-cx-saleshub-tile>
 <oj-cx-iss-mini-workspace>
 </oj-cx-iss-mini-workspace>
</oj-cx-saleshub-tile>
```

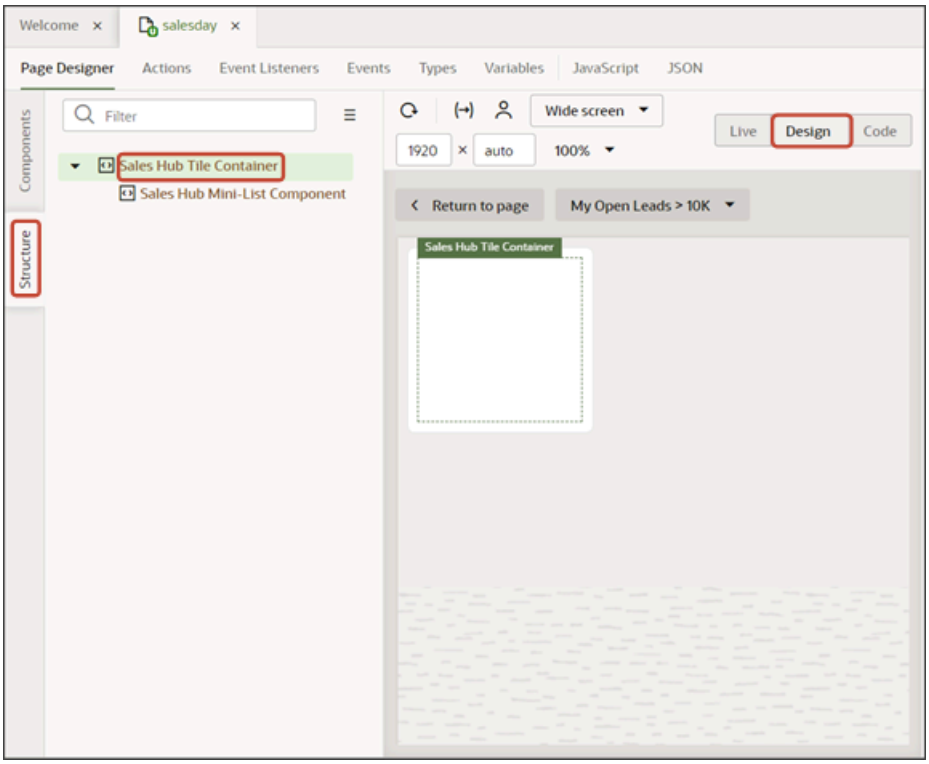
Here's a screenshot of the new code for a table:



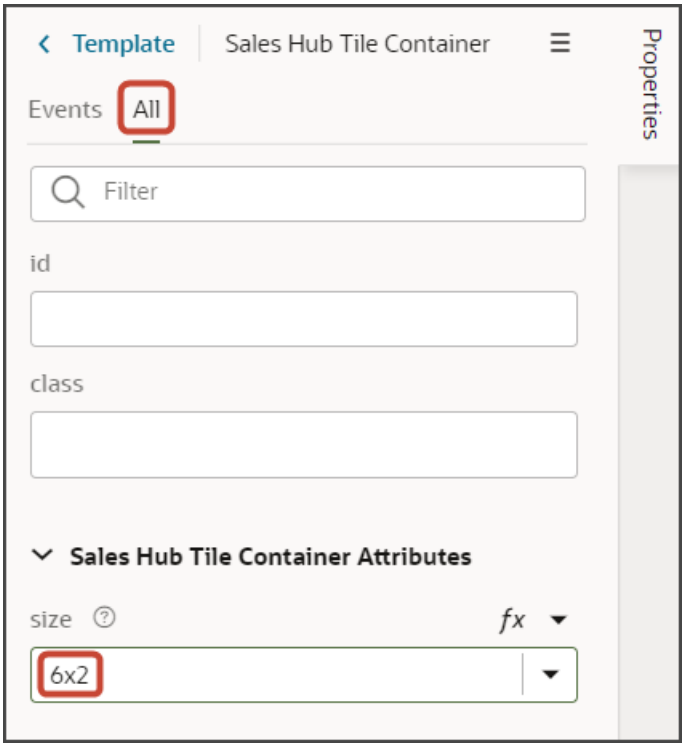
7. Click the Design button.



8. On the Structure pane, click **Sales Hub Tile Container**.



9. On the Properties pane, on the All tab, select **6x2** as the size.

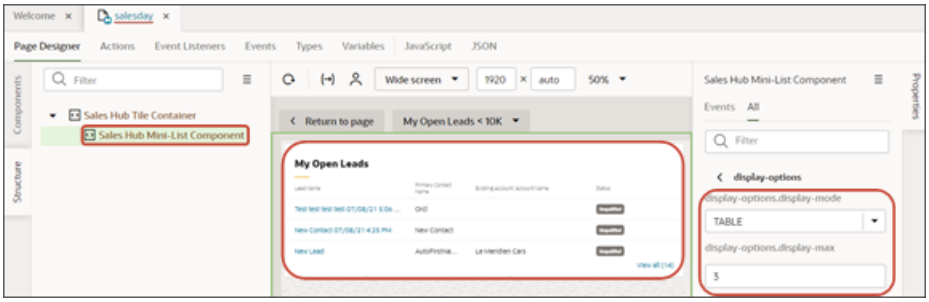


If data in the table is too wide for the size you select, then scroll bars automatically display.

10. Still on the Structure pane, click **Sales Hub Mini-List Component**.
11. On the Properties pane, on the All tab, click the **Show sub-properties** icon next to the Display Options field.
12. In the Display Option field, select **TABLE**.

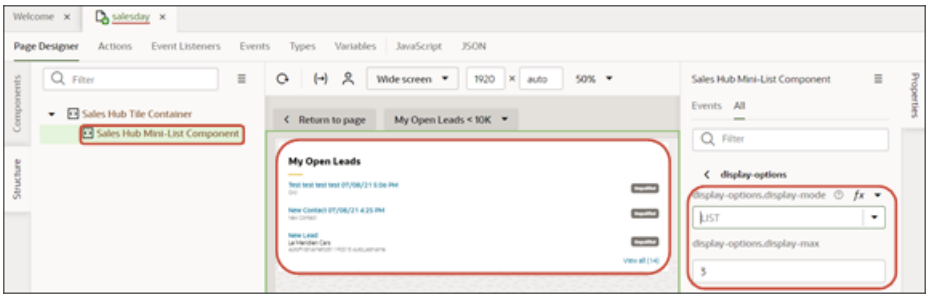
13. In the Maximum rows to display field, enter **3**.

    The table displays a maximum of 3 rows. If more data exists, then a View All link displays.



> **Note:** To add a list instead of a table, change the value of the Display Option field to **LIST**. Lists and tables use the same underlying component, **Sales Hub Mini-List Component**, and are both populated by saved searches.

    For example, here's a screenshot of creating a template for a list instead of a table:



    In addition to adding lists, you can also add a My List component to the Sales Dashboard. For more information about My List, see "My List" in the Oracle Fusion Cloud Sales Automation Using Digital Sales (Next Gen Sales) guide. To add a My List component, set the Display Option field to **LIST**, click **< Display Options**, and set the Show My List field to **true**.

14. Let's continue with the table example. Click **< Display Options**.
15. In the Type of objects field, select **Lead**.

> **Note:** A set of attributes is already predefined, per object, to display in the table. You can further modify which attributes display, if required. See "Modify the Columns in a Table Template" in the next section of this topic.

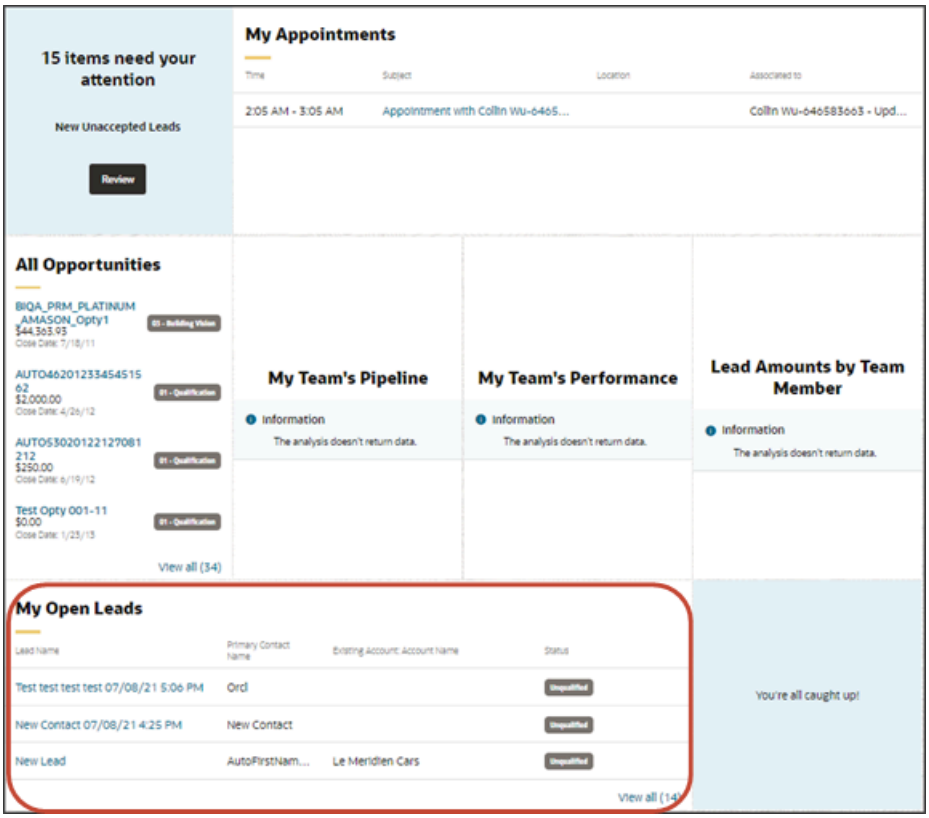
16. In the Identifier for Saved Search field, enter the UUID of the saved search.

    The UUID refers to the unique identifier of the saved search. The UUID is displayed in the saved search page's URL.

17. Click the Preview button to see your changes in your runtime test environment.



For example:



Modify the Columns in a Table Template

When you add a table to a dashboard, you specify the object that the table pulls its data from. For each object that you can select, Visual Builder Studio knows which attributes to display in the table since default attributes are already predefined. However, you can further modify which attributes display in the table, if desired. You can control three things: which fields to display as columns in the table, the width of those columns, and the column titles. Let's do that now.

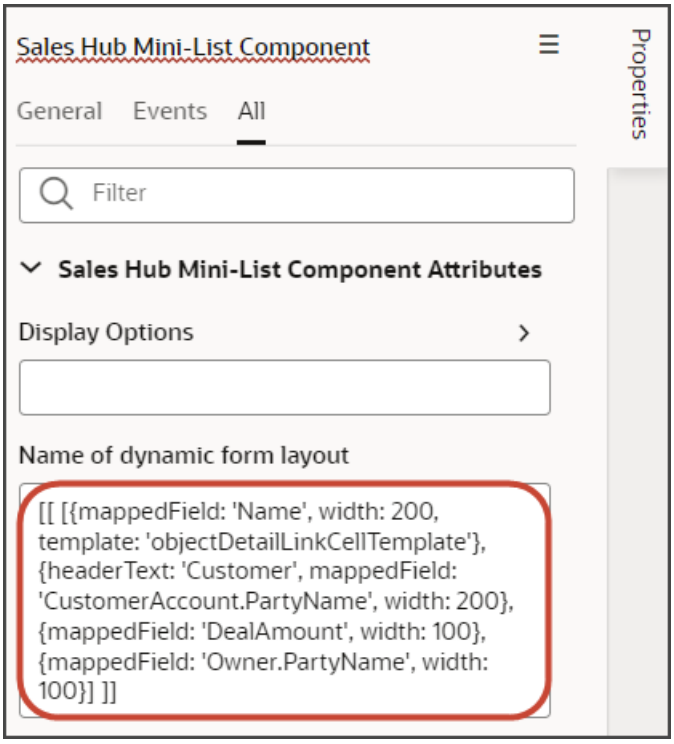
1. In the **Manager (Copy)** layout, click the **My Open Leads < 10K** template.
2. On the Structure pane, click **Sales Hub Mini-List Component**.
3. On the Properties pane, on the All tab, copy and paste the attributes you prefer to display in the **Name of dynamic form layout** field.

   Specify your preferred set of attributes using the field names from the object's elastic search payload, arranged in the below format. To override an attribute's display label, enter a headerText value. For example:

```
[[ [
{mappedField: 'Name', width: 200, template: 'objectDetailLinkCellTemplate'},
{headerText: 'Customer', mappedField: 'CustomerAccount.PartyName', width: 200},
{mappedField: 'DealAmount', width: 100},
```

```
{mappedField: 'Owner.PartyName', width: 100}
] ]]
```

Here's a screenshot of the Name of dynamic form layout field:



4. Click the Preview button to see your changes in your runtime test environment.



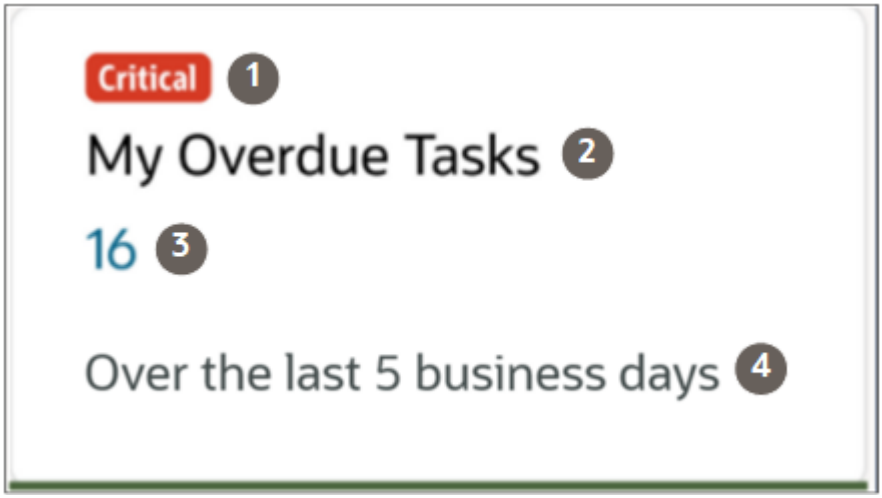
Notice the change in the table display:



Metric Cards and Badges

You can display a saved search on the Sales Dashboard as a metric card, one of the tiles at the top of the page. Metric cards are useful because they display an aggregate sum of items returned by the saved search. For example, how many overdue tasks do you have? Or, how many open leads exist that are over $100,000? Metric cards can display badges that visually alert salespeople when data meets certain conditions, which you can set. For example, the Critical badge appears automatically when there are 10 or more overdue tasks.

Here's a screenshot of a metric card and its components:



Anatomy of a Metric Card

Callout	Description
1	Badge
2	Title
3	The aggregate sum The sum is derived from the saved search that the metric card is based on.
4	Description

All metric cards provided by Oracle include a title and display the aggregate sum. Some metric cards provided by Oracle, such as the one for My Overdue Tasks, display badges. None of the metric cards include a description, but you can add one.

What You Can Configure

You can configure the following metric card components using Oracle Visual Builder Studio:

- Type of badge, and the conditions when the badge should appear

  For example, display a warning badge if the aggregate sum on the metric card is between 5 and 10 records. But if the aggregate sum is under 5, then don't display a badge at all.
- Badge text

  You can pick any text you'd like to display inside the badge.
- Metric card description

For more information, see "Configure Metric Card Badges and Descriptions."

Example of Badge Conditions

For example, the My Overdue Tasks metric card displays a badge above the card title under certain conditions. This metric card has two conditions and displays a different badge depending on the number of overdue tasks.

My Overdue Tasks Metric Card Badges

Condition: Number of Overdue Tasks	Badge Text
>= 5 and <=10	Warning
>10	Critical

If there are fewer than 5 overdue tasks, then no badge displays on the metric card.

Configure Metric Card Badges and Descriptions

You can configure metric cards so that different badges and descriptions display depending on certain conditions. For example, if a metric card displays 10 open leads, then maybe you'd like the warning badge to display. But if there are only 2 open leads, then maybe you don't want a badge to display at all. You do this configuration in Oracle Visual Builder Studio.

Prerequisites

A metric card displays data from a saved search. Before you add a metric card to the Sales Dashboard and configure it, you must:

- Create the saved search
- Share the saved search with the appropriate job role
- Capture the UUID of the saved search from the URL on the list page. Here's a screenshot showing the location of the UUID when you display the saved search.



- Create a copy of the Sales Dashboard layout where you want to add the metric card. See the topic *Duplicate the Predefined Sales Dashboard Layout* for details.

Overview of Setup Tasks

To configure the badges and descriptions for a metric card, complete these steps inside your Sales Dashboard layout:

1. Add a metric card region to the layout.
2. Specify the metric cards to display inside the region.
3. For each metric card, modify the card's badge properties:
    a. Specify the badge type and its display text.
    b. Specify the conditions when you want each badge type to display.
    c. Add description text, if needed.

Example of Metric Card Conditions

To configure badges and descriptions on a metric card, you first determine the display conditions. Each condition is a range of aggregate sum numbers that display on the metric card. For each range, you decide which type of badge and description to display. For example, you can configure this type of setup:

- If fewer than 5 overdue tasks exist, then don't show a badge at all.
- If 5-10 overdue tasks exist, then show a warning badge.
- If more than 10 overdue tasks exist, then show a critical badge and a description.

You can also configure the metric card so that the card always displays the same badge or description regardless of the aggregate sum on the card.

This setup is optional. If you skip this setup for a metric card, then no badges or descriptions will ever display on the card.

Sequence of Conditions

When you define the display conditions for a metric card, the order of those conditions is important. Each condition is evaluated in the order in which you define them, from top to bottom. Whichever condition is satisfied first is the condition that's applied.

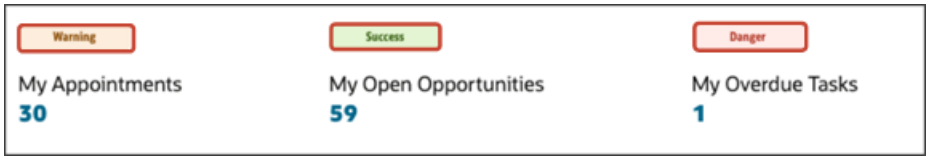
Badge Properties: Sample Format

For each metric card, the badge properties that you define must always follow a specific format. Here's a sample of the required format. In this sample, there's only 1 UUID which means that there's only 1 metric card.

```
saved-searches-list="[[ [
 {
 queryUuid: '5141f8ab-3aa8-4c0e-adf8-0b3ebb3218ac',
 badgeProp: [
```

```
{badgeStatus:'success', lowerLimit: 0,upperLimit: 3, badgeText: 'All OK'},
{badgeStatus:'warning', lowerLimit: 4, upperLimit: 5, badgeText: 'Please Check'},
{badgeStatus:'danger', lowerLimit: 6, badgeText: 'Problem'}
]
}
] ]]"
```

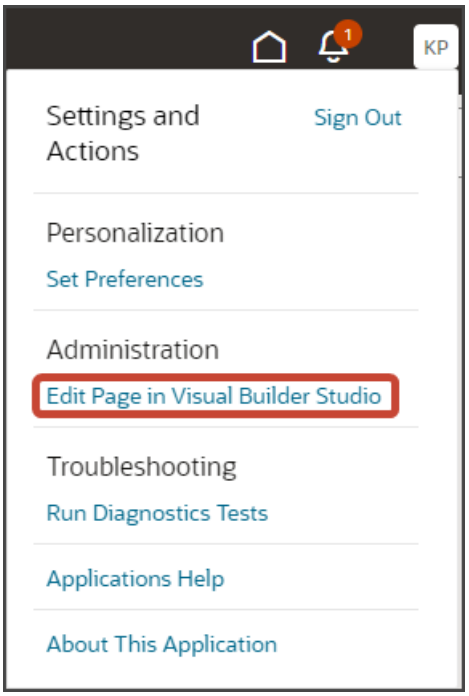
Badge Properties

Badge Property	Description
badgeStatus	• danger • info • neutral • success • warning Each type of badge (badgeStatus) displays with a specific color, which you can't change. Here's an example of several badges and colors: 
lowerLimit	Lower limit of the display condition for a specific badgeStatus.
upperLimit	Upper limit of the display condition for a specific badgeStatus.
badgeText	Text that appears on the badge. Each type of badge (badgeStatus) displays with default text, but you can use this property to change it.
metaText	Text description for the metric card.

Configure Badge Properties

To configure badges and descriptions for a metric card:

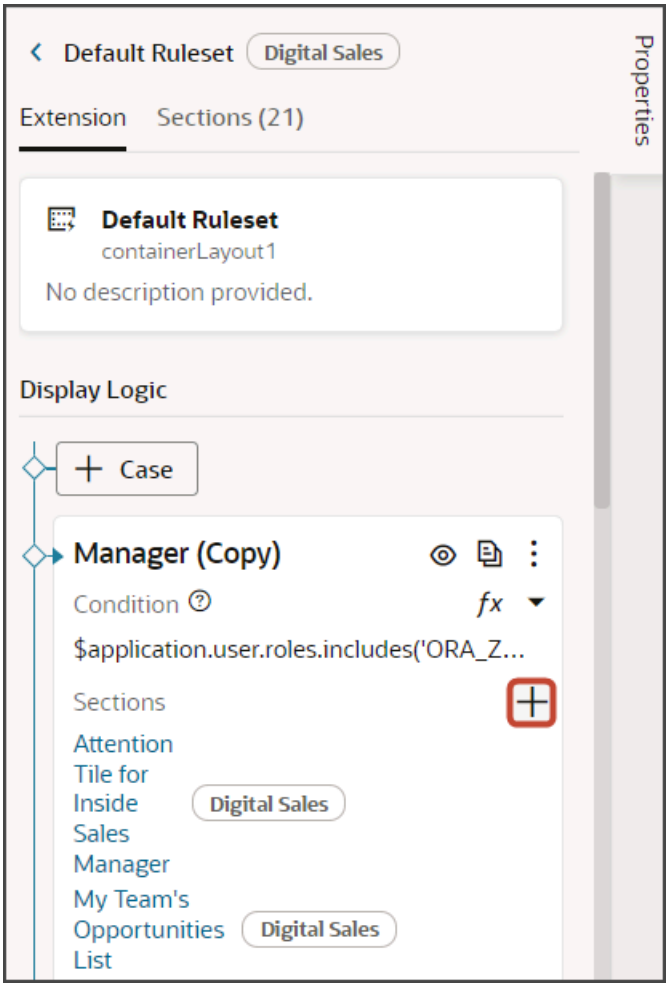
1. From the Sales Dashboard, enter into Oracle Visual Builder Studio. In the Settings and Actions menu, select **Edit Page in Visual Builder Studio**.



   You should be on the **salesday** tab in Page Designer.
2. Duplicate a Sales Dashboard layout, for example, duplicate the Manager layout and accept the default name, **Manager (Copy)**.

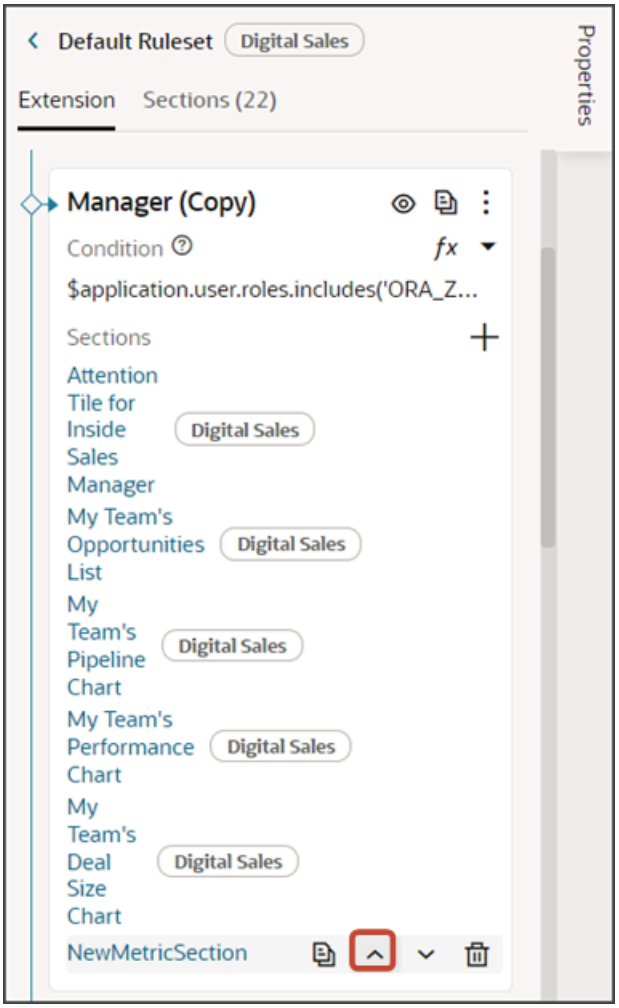
   See "Duplicate the Predefined Sales Dashboard Layout."

3. On the Properties pane for the Manager (Copy) layout, click the **+** Add Section icon > **+ New Section**.

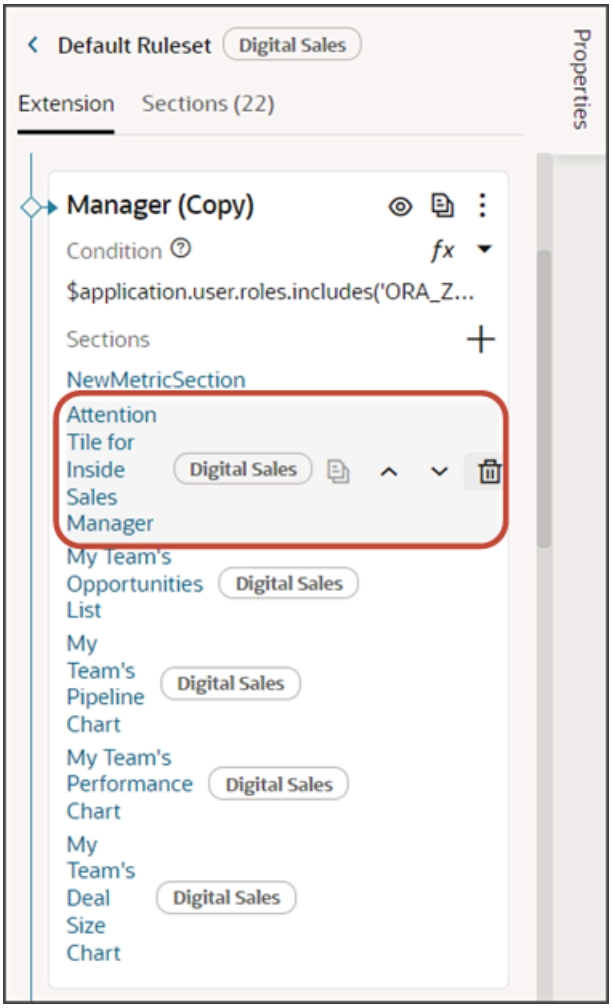


4. In the Create Section dialog, in the Title field, enter a section title, such as **NewMetricSection**, then click **OK**.

   The newly added section is added to the bottom of the layout. Use the Move Up arrow to move the new section to the top of the layout.



5. Delete the existing Attention Tile for Sales Manager section.



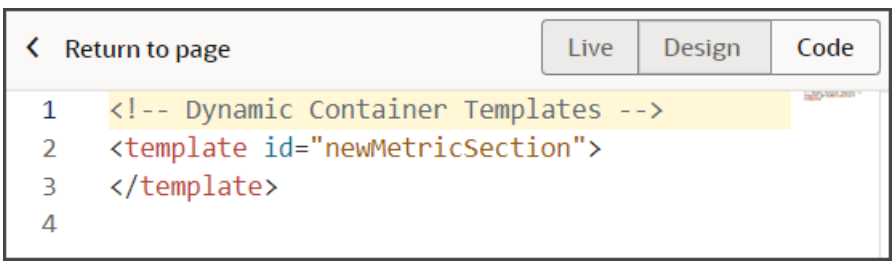
6. Click the **NewMetricSection** link.

   The template editor opens.

7. Click the Code button.



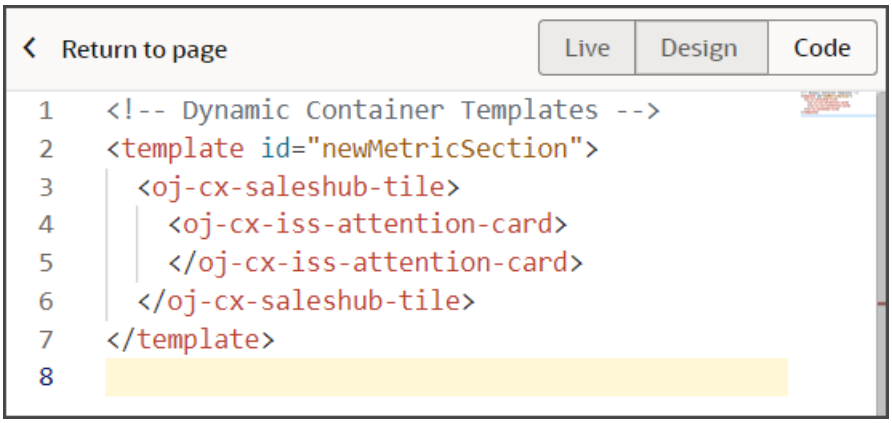
The **NewMetricSection** template displays with empty placeholder `template` tags.



8. To add a new metric card region to the dashboard layout, enter this code between the existing placeholder `template` tags.

```
<oj-cx-saleshub-tile>
 <oj-cx-iss-attention-card>
 </oj-cx-iss-attention-card>
</oj-cx-saleshub-tile>
```

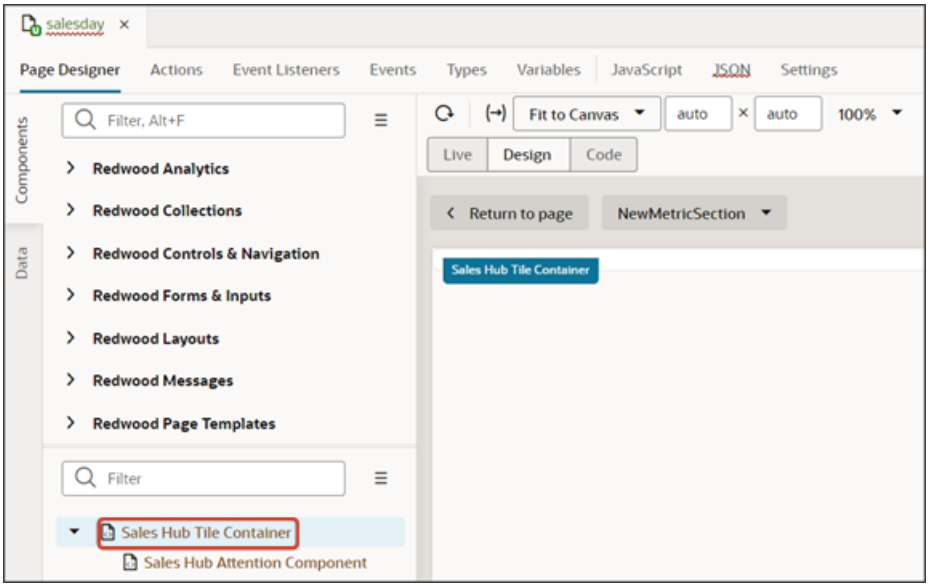
Here's a screenshot of the new template code for a metric card:



9. Click the Design button.



10. On the Structure pane, click **Sales Hub Tile Container**.



11. On the Properties pane, on the All tab, enter **8x1** as the size.
12. Still on the Structure pane, click **Sales Hub Attention Component**.
13. Click the Code button.
14. Add this placeholder code inside the oj-cx-iss-attention-card opening tag:

```
saved-searches-list="[[ [
```

```
{
queryUuid: '5141f8ab-3aa8-4c0e-adf8-0b3ebb3218ac',
badgeProp: [
{badgeStatus:'success', lowerLimit: 0,upperLimit: 3, badgeText: 'All OK'},
{badgeStatus:'warning', lowerLimit: 4, upperLimit: 5, badgeText: 'Please Check'},
{badgeStatus:'danger', lowerLimit: 6, badgeText: 'Problem'}
]
},
{
queryUuid: 'b803d9db-8b59-44b9-8968-f3525ae62882',
badgeProp: [
{badgeStatus:'success', lower: 25, Upper: 35, badgeText: 'All OK'},
{badgeStatus:'info', upper: 24, badgeText: 'Track'}
]
}
] ]]"
```

In the above sample, there are 2 UUIDs. The UUID refers to the unique identifier of each saved search that populates a metric card. Each UUID represents a single metric card.

Copy and paste the placeholder code to meet the number of metric cards you want to add to this region. For optimal viewing, 6 or 7 metric cards is a good maximum number to include in this region.

15. Once you've adjusted the code with the number of UUIDs (metric cards) you need, you can now update the rest of the code.
    a. For each metric card, replace the sample UUIDs with the correct UUIDs of your saved searches.
    b. For each UUID, optionally configure a badge properties section:

        - Specify the type of badge to display.
        - Define the conditions (upper and lower limits) under which each badge (and optionally a description) will display.
        - Optionally indicate the badge text. For example, does the text say Warning or Problem?
        - Optionally specify a description.

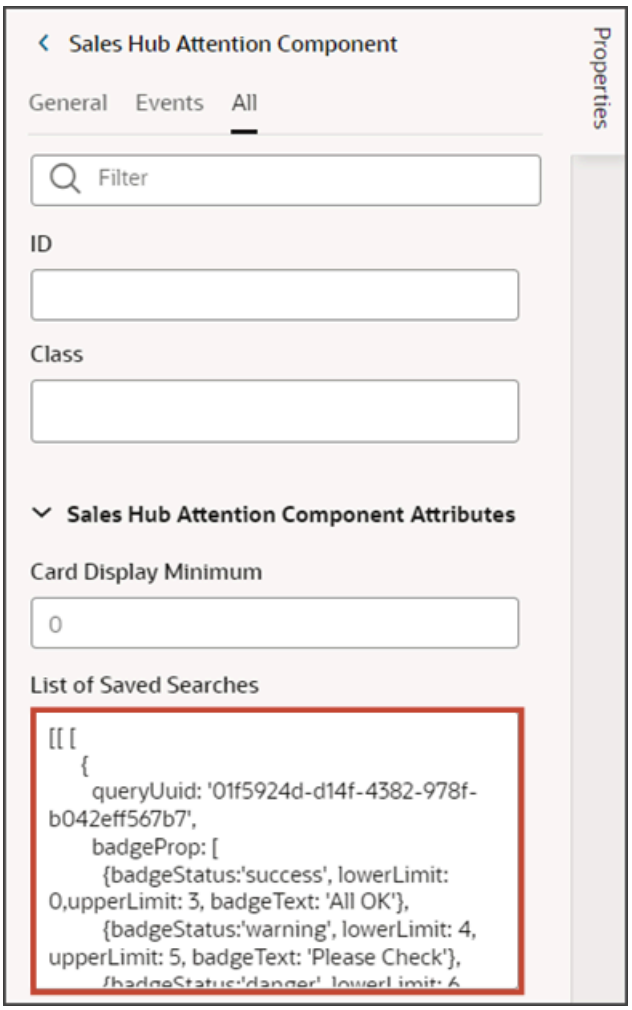
    Tips:

        - You can specify only a lower limit without an upper limit (to indicate an aggregate sum that's greater than 10, for example).
        - You can add metaText without any range conditions. So, if none of the ranges apply, then show a description on the metric card.
        - If you don't want to display a badge or description at all, then just add the queryUUIDs. For example:

```
saved-searches-list="[[ [
 {
 queryUuid: '5141f8ab-3aa8-4c0e-adf8-0b3ebb3218ac'
 },
 {
 queryUuid: 'b803d9db-8b59-44b9-8968-f3525ae62882'
 }
```

```
] ]]"
```

Note: The code that you add to the template editor displays in the List of Saved Searches field on the Properties pane.



16. Click the Preview button to see your changes in your runtime test environment.



Add a Visualization to the Sales Dashboard

You can add visualizations of saved searches or for Oracle Transactional Business Intelligence (OTBI) analyses to the Sales Dashboard. Your sales application delivers a set of predefined visualizations, or you can configure custom visualizations using the Visualization Configurations page. This topic walks you through how to add both predefined and custom visualizations to the Sales Dashboard.

Predefined Visualizations

Digital Sales includes these predefined visualizations which you can add to a Sales Dashboard layout where needed:

- My Earnings by Period
- My Team's Deal Size Chart
- My Team's Leads Size Chart
- My Team's Performance Chart
- My Team's Pipeline Chart
- Sales Pipeline Chart
- Template for Chart

To create your own visualizations, follow the instructions in the topic *Create Visualizations*.

Prerequisites

Add a Predefined Visualization to the Contents Container Copy

1. In the copy of the layout, for example, **Manager (Copy)**, review the layout's condition to ensure that the correct role is specified for this layout.

   > **Note:** For testing, it's best to delete the condition to ensure it's visible to you.

2. You're now ready to add a predefined visualization to your copy of the Sales Dashboard. In this example, we're adding the Sales Pipeline Chart to the Sales Dashboard for sales managers.
   On the Properties pane for the Manager (Copy) layout, click the **+** Add Section icon.
3. Click **Sales Pipeline Chart**.
   The newly added Sales Pipeline Chart is added at the bottom of the layout. You can change the order the sections are displayed. Just use the Move Up and Move Down arrows in the Sections region.
   You can add up to five sections in each dashboard tab. As you add sections the dashboard layout changes. For details, see the topic *How Information Displays in a Sales Dashboard Tab as You Add Sections*.

   > **Tip:** If you don't want to display a huge visualization, such as a pie chart, don't move the visualization to the first position. The first section always takes up most of the real-estate on the page, so it's more suited to a table.

4. Click the Preview button to see your changes in your runtime test environment.



Add a Custom Visualization to the Sales Dashboard

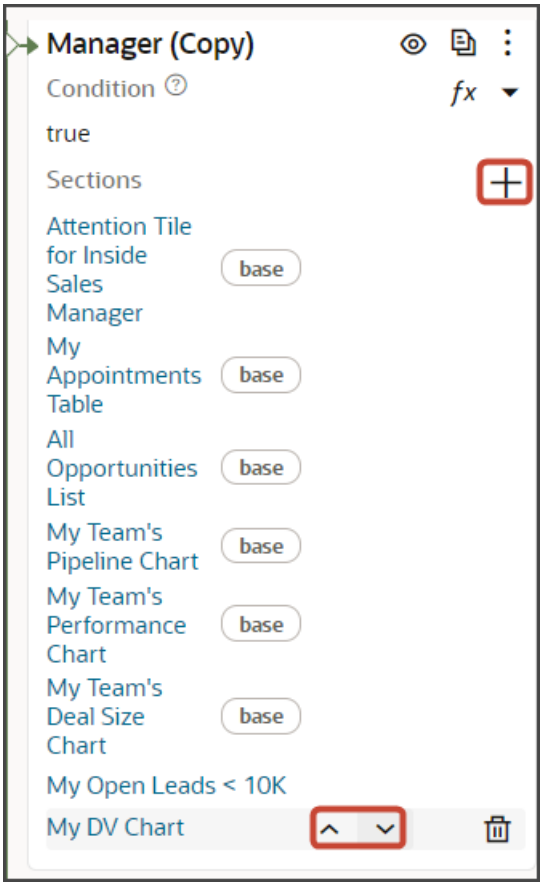
If you previously created your own visualizations using the Visualization Configurations page, then you can add them to any Sales Dashboard layout:

1. In the copy of the Sales Dashboard layout, for example, **Manager (Copy)**, review the layout's condition to ensure that the correct role is specified for this layout.

2. On the Properties pane for the Manager (Copy) layout, click the **+** Add Section icon > **+ New Section**.
3. In the Create Section dialog, in the Title field, enter a section title, such as **My DV Chart**, then click **OK**.

> **Note:** The title is the name of the section, not how the section will appear at runtime on the dashboard. The runtime title comes from the chart-title field which you set later in this procedure.

The newly added section is added to the bottom of the layout. You can change the order the sections are displayed. Just use the Move Up and Move Down arrows in the Sections region:



4. Click **My DV Chart**.

The template editor opens.

5. Click the Code button.



All custom sections that you've created for this dynamic container, if any, display in the editor.

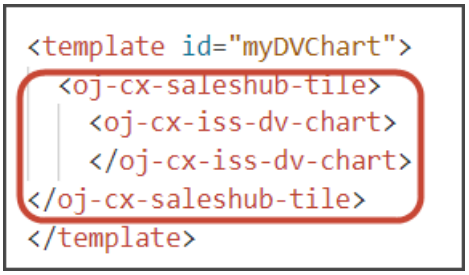
Your new **My DV Chart** section displays at the bottom with empty placeholder `template` tags.



6. For a visualization, enter this code between the existing placeholder `template` tags.

```
<oj-cx-saleshub-tile>
 <oj-cx-iss-dv-chart>
 </oj-cx-iss-dv-chart>
</oj-cx-saleshub-tile>
```

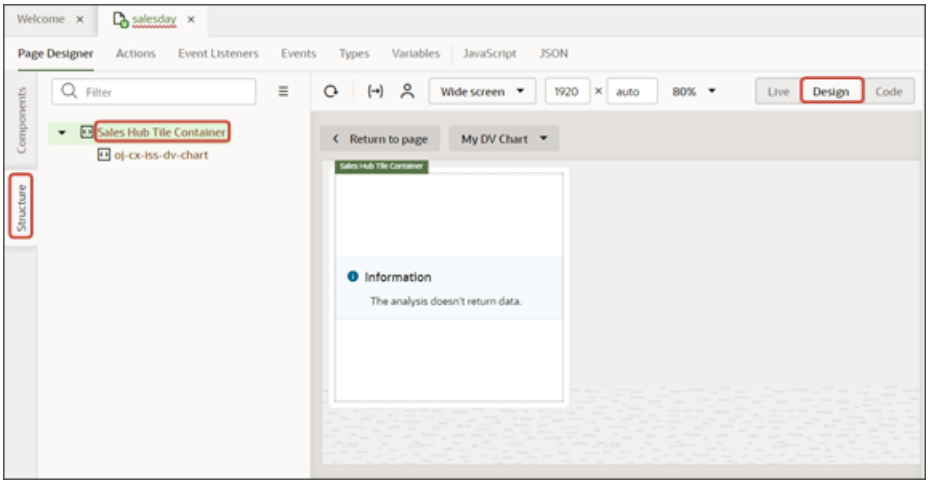
Here's a screenshot of the new template code for a visualization:



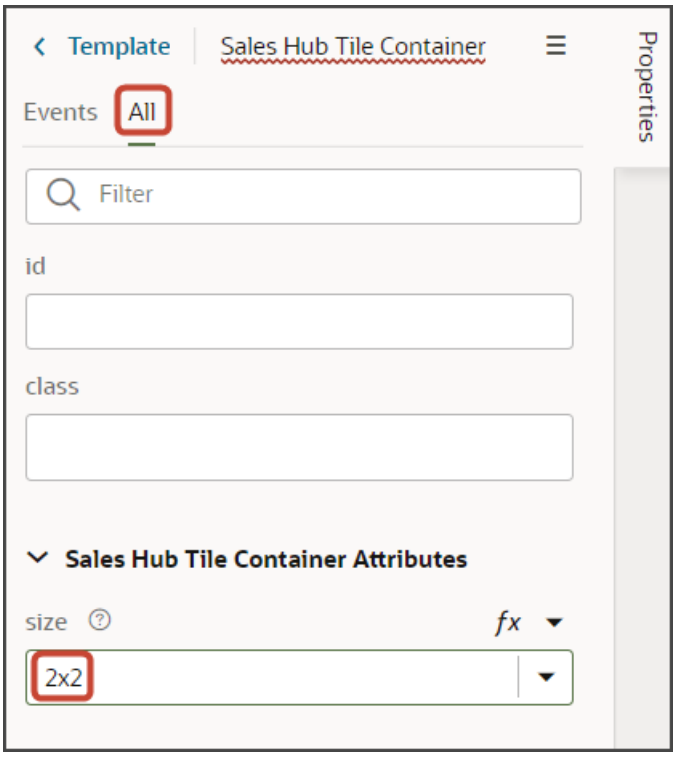
7. Click the Design button.



8. On the Structure pane, click **Sales Hub Tile Container**.

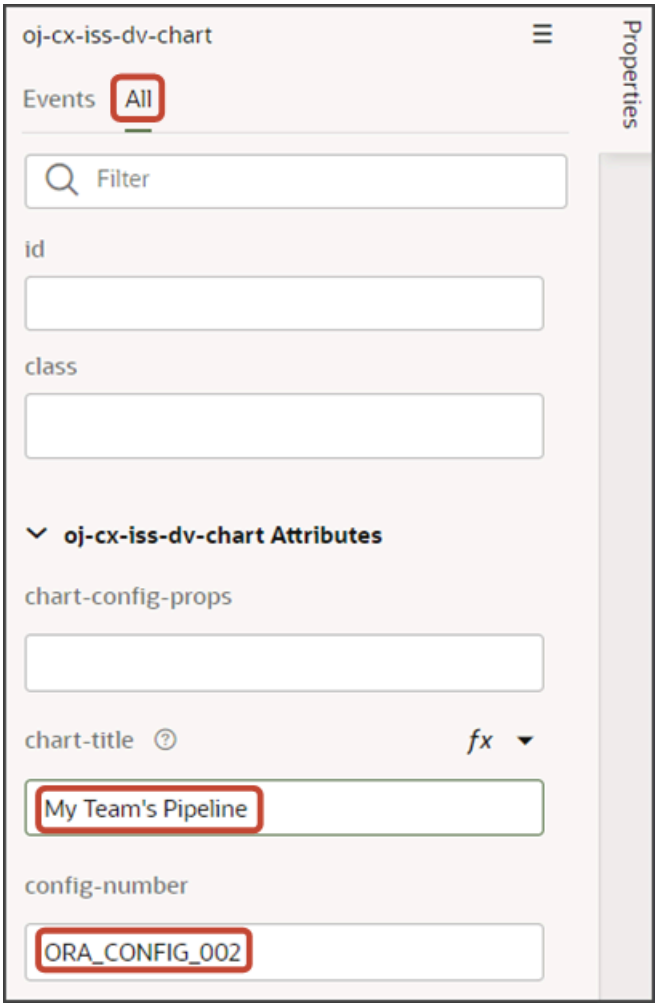


9. On the Properties pane, on the All tab, select **2x2** as the size.



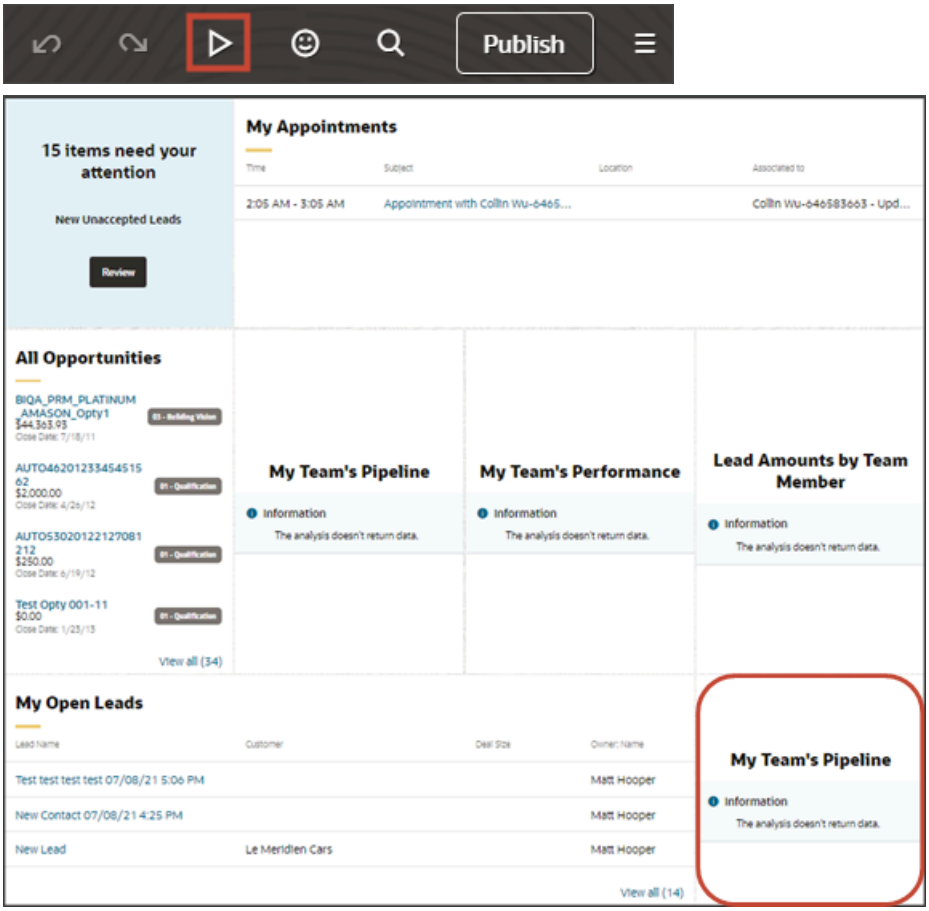
10. Still on the Structure pane, click **oj-cx-iss-dv-chart**.
11. On the Properties pane, in the Title field, enter `My Team's Pipeline`.

12. In the Configuration Number field, enter the reference number of the visualization that you previously created on the Visualization Configurations page.



For more information about creating visualizations, see *Create Visualizations*. (Visualizations can be added to both CX Sales Mobile layouts as well as Sales Dashboard layouts.)

13. Click the Preview button to see your changes in your runtime test environment.



How Information Displays in a Sales Dashboard Tab as You Add Sections

A sales dashboard can include anywhere from 1 to 5 sections in each of the tab pages you create. As you add sections, the display adjusts according to an underlying content style.

You can choose between 2 content styles:

- The default **above-fold** content style minimizes vertical scrolling by adjusting the size of the first section as you add more.
- The alternate **hero-plus** content style always displays the first section to the full width and height. All other sections appear underneath.

The Default Above-Fold Content Style

In the **above-fold** style, the first panel is the biggest section, but the panel shrinks horizontally and vertically as you add sections. Salespeople don't have to scroll if they have a standard-sized monitor.

Here's how the above fold layout changes depending on the number of sections you specify in the container.

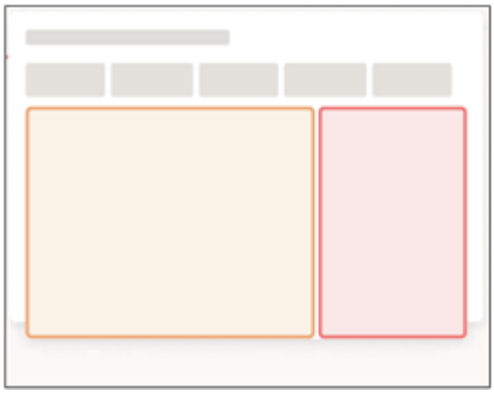
- 1 section

  The section takes up the full width and height of the content region of the tab.



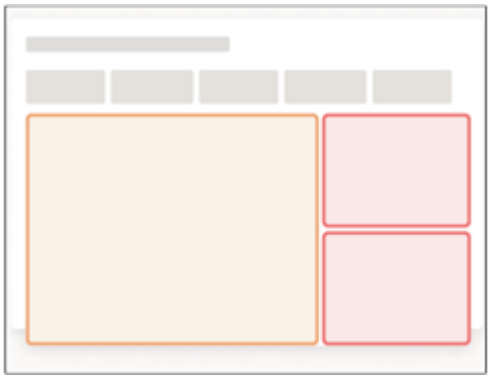
- 2 sections

  The first section takes up two-thirds of the width at full height and the second section takes up the rest.



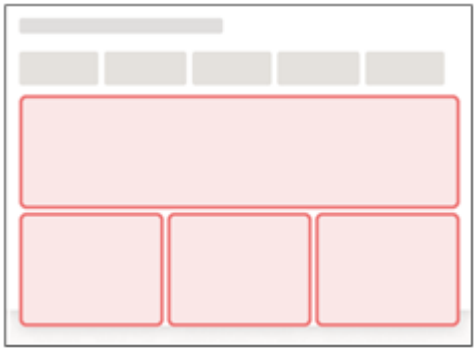
- 3 sections

  The first section takes up two-thirds of the width at full height and the second and third sections split up the remaining third horizontally.



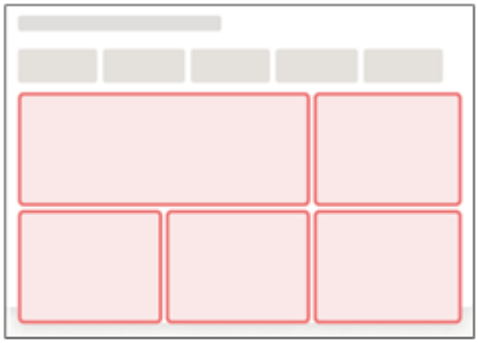
- 4 sections

  The first section takes up the full width of the dashboard but only a half of the height. The three other sections split the remaining space below the first section.



- 5 sections

  The first section takes up two-thirds of the width at half the height, The second section follows with one third of the width and at half the height. The three remaining sections split the remaining space below the first section.



The Alternate Hero-plus Layout

The **hero-plus** layout displays the fist section, the most important information, over the full width and height of the available space.When you add sections, they appear below. Salespeople may have to scroll down to see them.

- 1 section

  The first section takes up the full width and height of the space available.



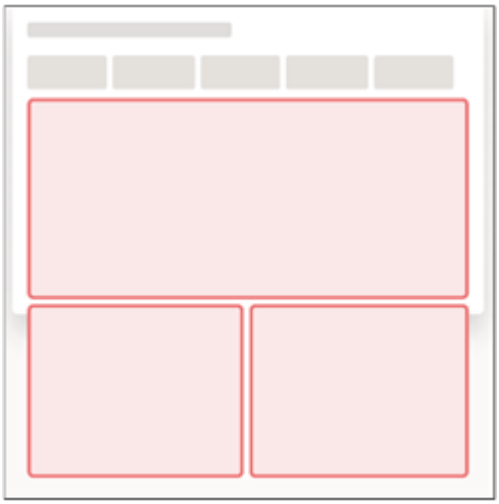
- 2 sections

  The first section takes up the width at full height. The second section displays below.



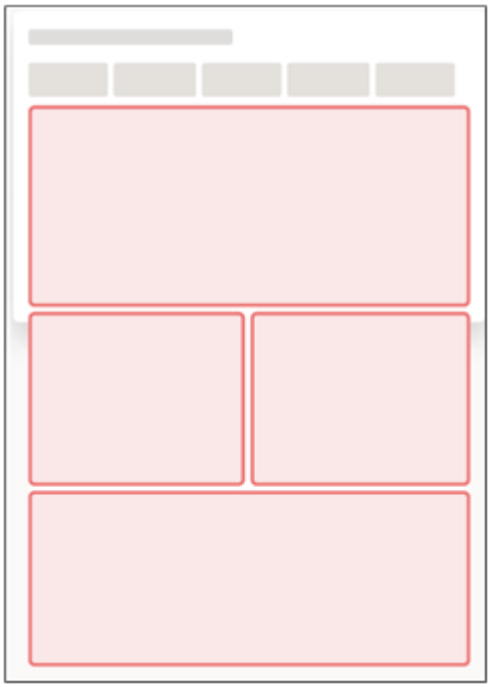
- 3 sections

  The first section takes up the width at full height. The remaining 2 sections display below next to each other, each at half of the width.



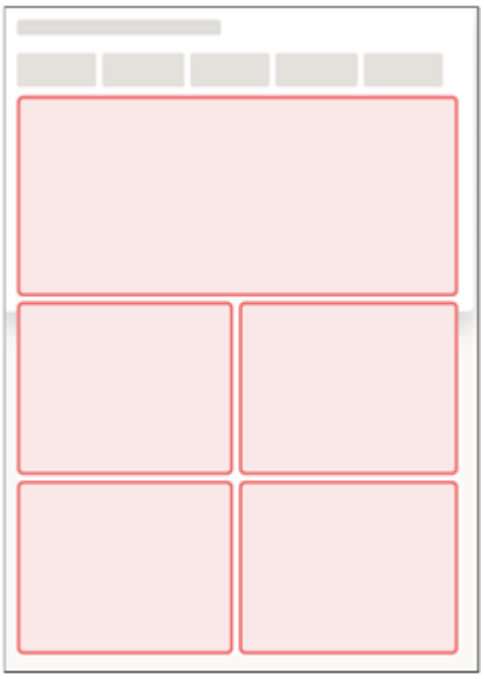
- 4 sections

  The first section takes up the width at full height. The next 2 sections display below, each at half of the width. The fourth section appears at full width below.



- 5 sections

  The first section takes up the full width and height of the dashboard. The rest of the sections appear underneath at half the width.



Add an Oracle Analytics Component to the Sales Dashboard

You can embed content created in Oracle Analytics Cloud into the Sales Dashboard using Oracle Visual Builder Studio.

For more information about the Oracle Analytics embedding framework, see the Oracle Cloud Visualizing Data and Building Reports in Oracle Analytics Cloud guide.

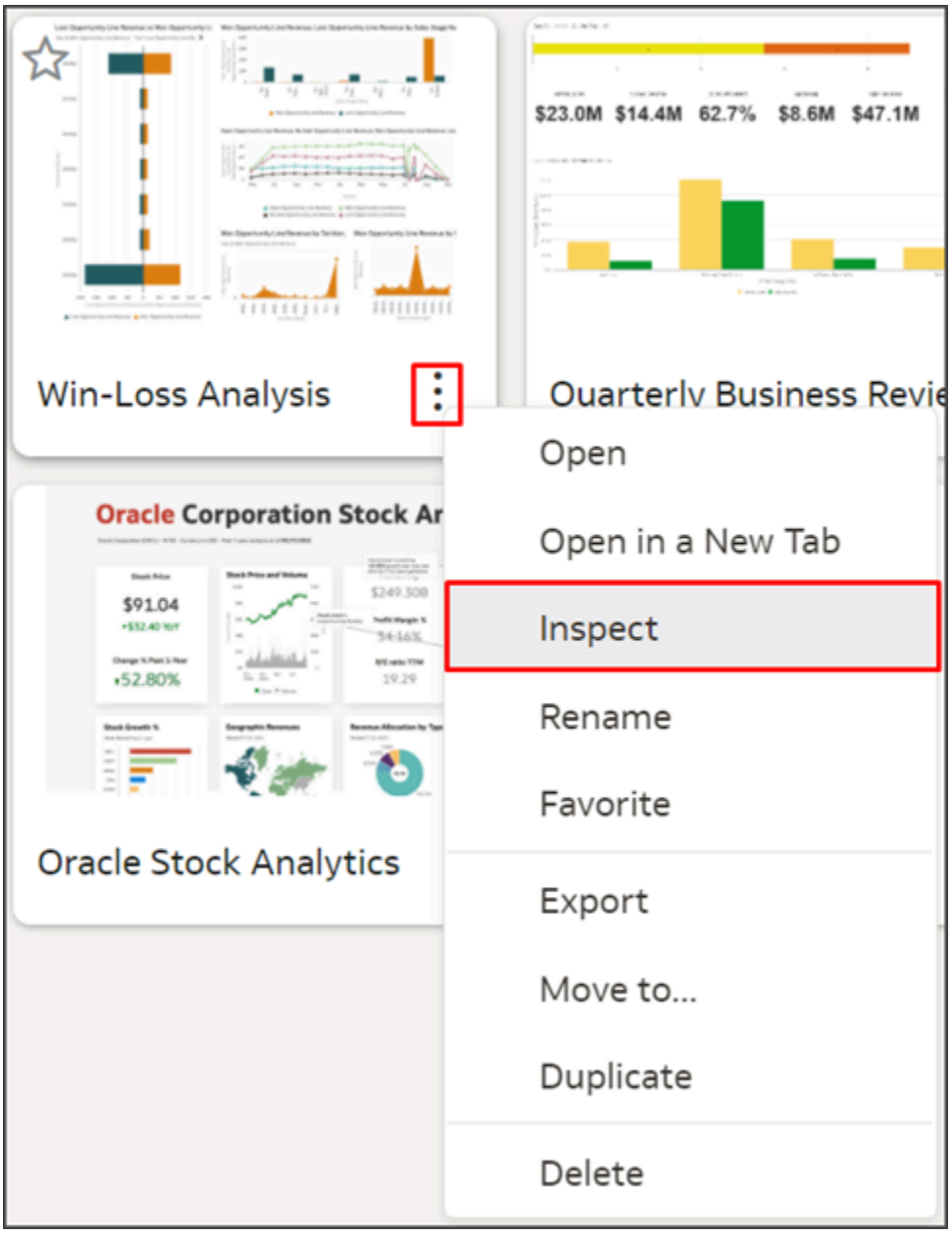
Here's an example of an Oracle Analytics component:



Prerequisites

Before adding an Oracle Analytics component to the Sales Dashboard, you must:

1. Retrieve the Object ID from your existing Oracle Analytics content:
    a. Navigate to the Oracle Analytics Host where the analytics workbook is saved.
    b. Click the Actions menu > **Inspect**.



    c. Next to the Object ID, click **Copy**.



d. Paste the Object ID, along with the Oracle Analytics Host URL, into a separate file for later use. For example:

   i. Oracle Analytics Host:

   ```
   https://oac01-gse00010001-px.analytics.ocp.oraclecloud.com/
   ```

   ii. Object ID:

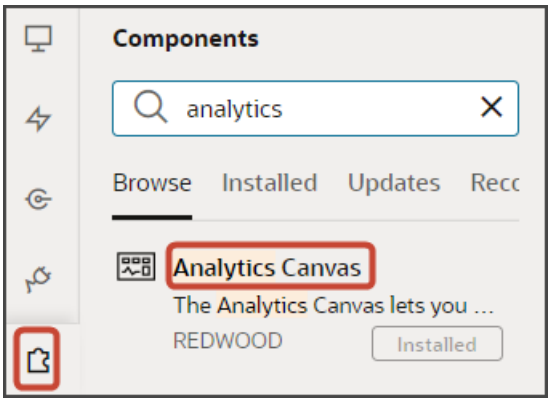
   ```
   /@Catalog/users/oac01.user/Win-Loss Analysis
   ```

2. Create your own workspace in Visual Builder Studio if you don't yet have one.

   For more information, see "Create Your Own Workspace" in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative.

3. Add the Analytics Canvas component to your workspace.

   a. Click the Components side tab in Visual Builder Studio.
   b. Use the search field to find the Analytics Canvas component.
   c. Click **Install**.



4. Create a copy of the Sales Dashboard layout in Visual Builder Studio. See *Duplicate the Predefined Sales Dashboard Layout*.

Add an Oracle Analytics Component to the Sales Dashboard

1. In a copied version of the Sales Dashboard layout, such as the Manager (Copy) layout, review the layout's condition to ensure that the correct role is specified for the layout.
2. On the Properties pane for the Manager (Copy) layout, click the **+** Add Section icon > **+ New Section**.
3. In the Create Section dialog, in the Title field, enter a section title such as **OAC Section**, then click **OK**.

   > **Note:** The title is the name of the section, not how the section will appear at runtime on the dashboard. The runtime title comes from the header attribute that you define for the component in step 6.

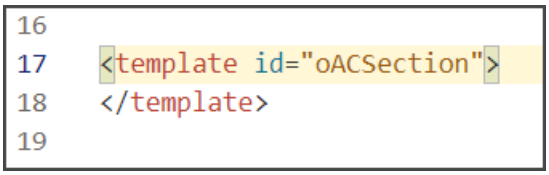
   The newly added section is added to the bottom of the layout. To reorder sections, use the Move Up or Move Down arrows in the Sections region.
4. Click **OAC Section**.

   The template editor opens.
5. Click the Code button.

   All custom sections that you've created for this layout display in the editor.

   Your new **OAC Section** section displays at the bottom with empty placeholder `template` tags.

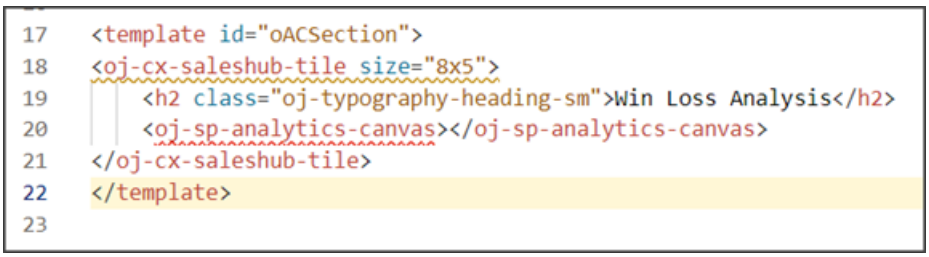
   

6. For an Analytics Canvas component, enter this code between the existing placeholder `template` tags.

```
<oj-cx-saleshub-tile size="8x5">
 <h2 class="oj-typography-heading-sm">Win Loss Analysis</h2>
 <oj-sp-analytics-canvas></oj-sp-analytics-canvas>
```

```
</oj-cx-saleshub-tile>
```

Here's a screenshot of the new template code:

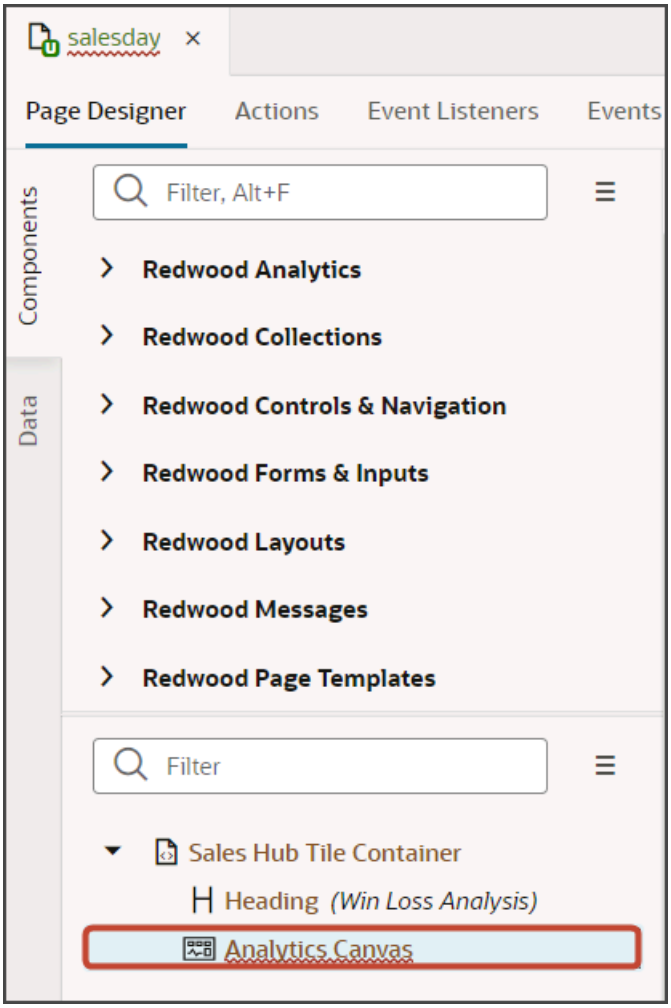


> **Tip:** The value of the size attribute defines the size of the component on the Sales Dashboard. Use "8x5" to take the full width of the dashboard.

7. Click the Design button.



8. On the Structure pane, click **Analytics Canvas**.



9. On the Properties pane, in the Oracle Analytics Host field, enter the host URL that you previously saved, such as **https://oac01-gse00010001-px.analytics.ocp.oraclecloud.com/**.
10. In the Project Path field, enter the repository path of the project to render, such as **/@Catalog/users/oac01.user/Win-Loss Analysis**.

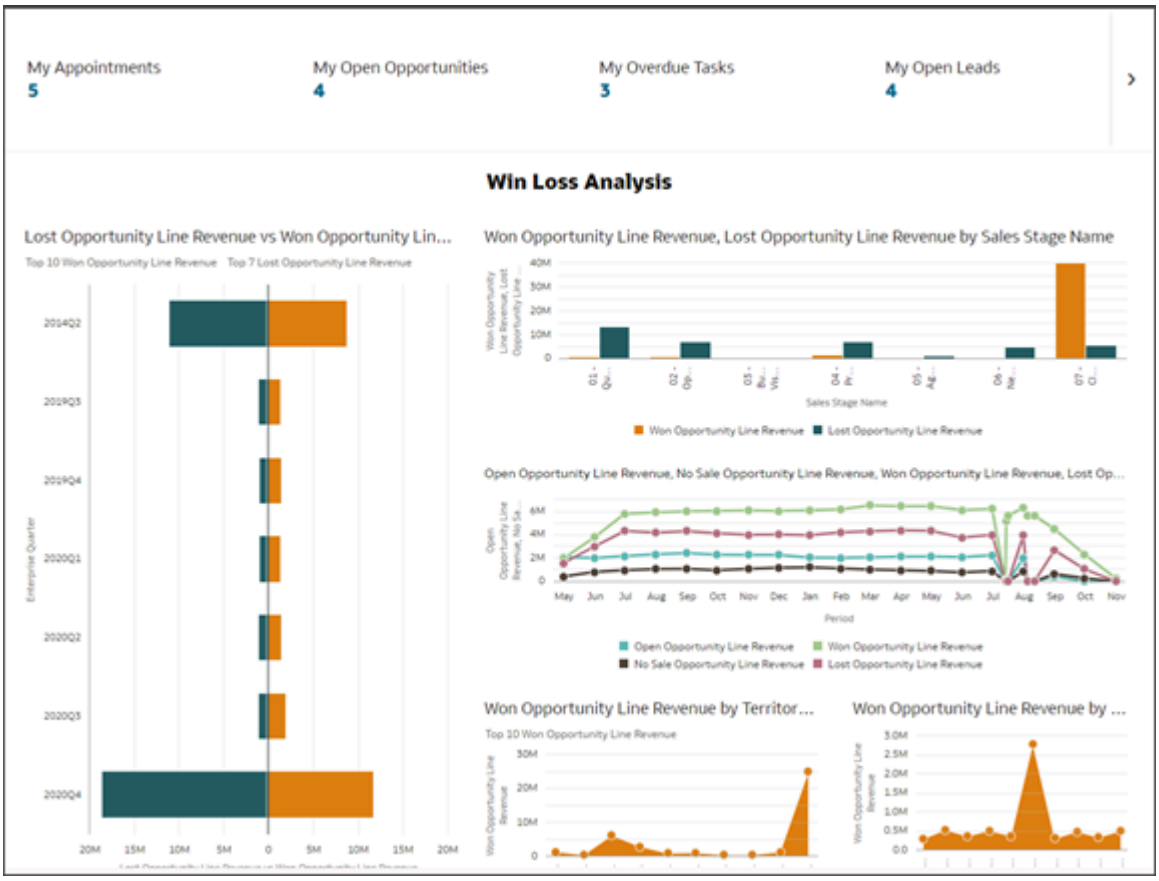
    This is the Object ID of the Oracle Analytics workbook that you previously saved.
11. Optionally click the Code button to view the template code. The code will look something like this:

```
<oj-cx-saleshub-tile size="8x5">
 <h2 class="oj-typography-heading-sm">Win Loss Analysis</h2>
 <oj-sp-analytics-canvas host="https://oac01-gse00010001-px.analytics.ocp.oraclecloud.com/"
 project-path="/@Catalog/users/oac01.user/Win-Loss Analysis"></oj-sp-analytics-canvas>
</oj-cx-saleshub-tile>
```

12. Click the Preview button to see your changes in your runtime test environment.



For example:



13. Click **Publish** to apply the changes to the Sales Dashboard.

For more information, see "Share and Publish Your Application Extension" in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative.

19 Sales Territories and Assignment

Setup Overview

If you assign accounts and opportunities to salespeople by address, product, industry, or other criteria, this chapter is for you.

You learn how to set up a sales territory hierarchy to automatically provide salespeople with access to the accounts and opportunities they need to work on. Although you set up Sales Territories in the CX Sales UIs, sales territories apply to both CX Sales and Digital Sales UIs.

The hierarchy you build also provides the reporting hierarchy used for forecasting and for assigning quotas. Salespeople access both forecasting and quotas using the CX Sales UI.

The sales territory hierarchy is separate from the resource hierarchy you built earlier when you created sales users. Both hierarchies provide access to opportunities: the owners of parent sales territories gain access to opportunity data in child territories in the same way as resource managers gain access to the opportunities of the resources reporting to them. However, forecasting and quotas rely on the sales territory hierarchy. If you want sales managers to forecast and work quotas, create a sales territory hierarchy that includes those sales managers.

> **Note:** If your salespeople forecast only the opportunities they own and you don't need to assign opportunities to them automatically by address or other criteria, then you can skip this chapter entirely. That's because, for this use case, the application sets up everything you need. It sets up a territory structure that mirrors your sales organization hierarchy. And it automatically assigns the opportunity to the opportunity owner's territory. The opportunity revenue gets included in the owner's forecast and passed up the management chain for adjustment and approval. The Forecasting chapter provides the details.

Here are the steps for setting up sales territories and assignment.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Digital Sales and CX Sales	Enable the territory dimensions you plan to use in your territories.	**Setup and Maintenance** > **Sales** > **Territories** > **Enable Dimensions and Metrics**	See the topic: *Enable Sales Territory Dimensions*
2	Both Digital Sales and CX Sales	Create a territory proposal. A proposal is a sandbox that permits you to update territories without affecting any existing territory setup.	**Navigator** > **Territories**	See the topic: *Create a Territory Proposal*
3	Both Digital Sales and CX Sales	Create the hierarchy of sales territories in the proposal starting with the top territory and working your way down. You can get an overview of some of the techniques you can use	**Navigator** > **Territories**	See the topic: *Create the Sales Territory Hierarchy*

Step	Applies To	Description	Navigation	Where to Get More Details
		for the setup in the Sales Territory Use Cases section.		
4	Both Digital Sales and CX Sales	Activate the territory proposal.	**Navigator** > **Territories**	See the topic: *Activate the Territory Proposal*
5	Both Digital Sales and CX Sales	Enable automatic assignment of sales territories to imported accounts by setting the following system profile options to Yes: • Sales Account Automatic Assignment on Import Enabled • Sales Account Automatic Assignment on Create Enabled • Sales Account Automatic Assignment on Update Enabled	**Setup and Maintenance** > **Sales** > **Foundation** > **Manage Administrator Profile Values**	See the topic: *Enable Automatic Assignment of Imported Accounts*
6	Both Digital Sales and CX Sales	You can enable automatic assignment of territories to opportunities whenever the opportunities are updated. By default, the application automatically assigns sales territories to accounts whenever an account is created or updated, but opportunity assignment isn't automatic. Sales users must trigger opportunity assignment manually while editing an opportunity or they must wait for the opportunity assignment process to run. Oracle specifies manual opportunity assignment as the default to prevent performance issues for companies with a large number of opportunity lines (100,000 and up). If your organization doesn't have such a large volume, then set the profile Assignment Submission at Save Enabled to Yes. Oracle	**Setup and Maintenance** > **Sales** > **Opportunities** > **Manage Opportunity Profile Options**	See the topic: *Make Opportunity Assignment Automatic*

Step	Applies To	Description	Navigation	Where to Get More Details
		also recommends a setting of Yes for forecasting.		
7	Both Digital Sales and CX Sales	Run the account and opportunity assignment processes (Request Account Assignments and Revenue Territory Territory Based Assignment) immediately after setting up sales territories and on a regular schedule, perhaps once every day during off-peak hours.	**Navigator** > **Tools** > **Scheduled Processes**	See topics: • *Run the Account Assignment Process* • *Run the Opportunity Assignment Process*

Sales Territories and Assignment

Getting assigned to a sales territory provides salespeople with access to accounts and opportunities. Sales territories also provide the framework for forecasting. Salespeople can forecast only opportunity lines in their territories and forecasts roll up the territory hierarchy.

How You Gain Access to Sales Data

All salespeople can view basic account information, including customer names, contacts, and addresses. You must have additional access to view the opportunities on the account, and to share all the details you need to collaborate during the sales process. Information that requires additional access includes customer interactions, to-do lists, and appointments. Without the additional access, you can't share collateral, and collaborate on presentations. If you implement Microsoft 365 or Mobile, then only the accounts that are part of a salesperson's territory are downloaded and synchronized. Here's how you get access to additional sales information:

- You're the owner of the record.

  Each record must have an owner. You automatically become the owner of any record you create. The owner, who is automatically a member of the team on the record, has full privileges, including the ability to edit the record and add others to the team. The record owner or the sales administrator can reassign ownership of individual records. The sales administrator can also reassign ownership of multiple records at the same time using the Mass Transfer feature available in the Navigator. Users converting a lead to an opportunity, can also assign the owners of the resulting accounts and opportunities.
- You're a member of the team on the record.

  The owner can add members manually and assign different levels of access to them: view only, edit, or full (the ability to add others). For opportunity and lead teams, you can also assign team members automatically using assignment rules.

- You're the owner or a member of a sales territory assigned to the record or owner or member of the parent territories in the sales territory hierarchy.

  Being the owner of a territory makes gives you additional privileges over a member: owners can review and submit forecasts up the sales territory hierarchy.

  > **Note:** While the territory name is always listed in each record that's assigned to a territory, opportunities also copy over the names of the territory members to the opportunity team. Lead teams and account teams don't include the territory team members. If you want to make the opportunity team behavior consistent with leads and accounts, you can set the system profile option Territory Based Resource Assignment Style as described in the Opportunity Profile Options Default Values and Effects topic in the Implementation Reference guide.

- You're a manager in the resource hierarchy of the resource with access.

  Managers in a salesperson's resource management hierarchy have automatic visibility to their team's set of accounts, contacts, opportunities, leads, and other information. They don't have to be explicitly assigned to each territory or team. The resource hierarchy provides you access to sales data, but not to forecasts. Only territory owners can view forecasts. Most Oracle customers create a sales territory hierarchy that matches the resource hierarchy, so a manager is also the owner of the territory, but the two can be different.

- You're assigned to an access group.

  Access groups provide an alternate way of providing access to sales data based on conditions you define. For example, you can use access groups to grant specific users access to all open opportunities, or all accounts in the UK, and so on. Access groups aren't replacements for sales territories, but they provide a good way to grant access to people who assist with sales. For example, you may need to provide the legal department with access to certain opportunities.

- You're a sales administrator (a user with the Sales Administrator job role).

  Sales administrators have access to everything.

- The implementation team configures and assigns job roles with different privileges.

  You can change the default access levels, by copying and modifying the existing job roles. See the Create and Edit Job, Abstract, and Duty Roles chapter of the Securing CX Sales and Fusion Service guide for more details.

How You Grant Additional Access Automatically

You can provide salespeople access by manually reassigning record ownership or adding someone to the team on the record, or you can automate the process using one or both of the following methods:

- Assign access using sales territories.

  You can set up the sales territory boundaries based on a wide variety of factors, called dimensions. The most common dimensions include address, product, customer size, customer type, and industry. Many Oracle customers also define their own additional dimensions.

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

  The application assigns territories for each individual opportunity line separately. If an opportunity line gets assigned to your territory, you automatically gain access to the whole opportunity. If Lisa Jones' territory

includes servers and Julian Henderson's laptops, both salespeople get access to an opportunity that includes servers and laptops.

- Assign opportunity and lead access to specific individuals by creating assignment rules.

  You can use rules to assign individual salespeople you specify to lead and opportunity teams if the rule conditions are met. Rules are the primary way of assigning salespeople to leads, and so rule setup is covered in the Leads chapter. For opportunities, you can create rules to assign additional salespeople using factors that aren't covered by sales territories, such as deal size or product knowledge. Creating rules to supplement territory assignment requires additional setup, including the setting of system profile options not covered in this guide. See the Implementation Reference guide for details.

Salespeople can trigger assignment manually or you can assign leads, accounts, and opportunities automatically by running assignment processes.

Sales Territory Boundaries

You define sales territory boundaries by the values you assign to their dimensions. For accounts, the territory dimensions provided by Oracle include:

- Address

  Define territories by address elements such as city, state, and postal code.

- Geography

  Legacy dimension that existing customers are using for geographical territories. While you can still use Geography to set up territories by states and other address elements, new Oracle customers should use the Address dimension instead. You can't use this dimension together with the Address dimension.

- Account type

  The account type specifies if the account is named or not.

- Customer size
- Industry
- Organization type

You can also create classification categories to define up to three additional dimensions.

Because opportunities are associated with an account, you can use the account dimensions to assign opportunities as well. Opportunities and leads have these additional dimensions:

- Business unit
- Product

  You can enter product groups or individual products from the sales catalog.

- Sales channel

  The available sales channels are: Direct, Indirect, and Partner.

Related Topics

- Opportunity Profile Options Default Values and Effects

Address Dimension

Use the Address dimension to set up sales territories by a combination of address elements, such as state, city, and postal code.

The application uses pattern matching for assignment, so you must include all variations of spellings that exist in your data in the territory definition. The cleaner and the more consistent your data, the less work you have to do.

When you define each territory, you can enter multiple rows of address elements:

- All the entries in a row must match for assignment (AND operator)
- If you enter multiple rows, one of the rows must match for assignment (OR operator)

Here's how the entries are matched:

- For all of the address attributes except Postal Code, the application uses exact matches. When you define the coverage for a territory, you must include all the possible spellings that exist in your address data. The match must be exact, but matches aren't case-sensitive, so you don't have to include **TX** and **Tx** as separate spellings, for example.
  If you're creating a territory for the state of Texas, you may need to include these different spellings, depending on what's in your data: **TX**, **Tex**, **Tex.**, and **Texas**.
  You enter these spelling variations as four separate lines in the Texas state territory definition. The country is always required.

Country	State
United States	TX
United States	Tex
United States	Tex.
United States	Texas

  Here's how you could define a territory for the city of Dallas, Texas:
  - You need both state and city to match.
  - Dallas must be spelled correctly in your data every time.

Country	State	City
United States	TX	Dallas

Country	State	City
United States	Tex	Dallas
United States	Tex.	Dallas
United States	Texas	Dallas

- To match by postal codes, such as US ZIP codes, you can enter ranges of values or partial values. Here are the rules:
    - You can enter ranges of values and the ranges don't have to be valid postal codes. For example: `94501-94599`.
    - Use the percent sign (%) at the end of an entry to indicate partial matches. For example, you can enter `940%` to indicate all the postal codes starting with 940.
    - You can't use the percent sign for ranges.
    - You can use US ZIP+4 postal codes in ranges, provided you enclose them in double quotation marks, for example: `"94065-0000"-"94070-9999"`.

If there's a chance that some of your Dallas addresses don't include the city, then you could add a line to your Dallas territory definition to enable assignment by postal code:

Country	State	City	Postal Code
United States	Any	Any	75001 - "75222-9999"

Here's an explanation:

- The country is required, but the values for state and city are Any because you're matching only the postal code. There's an implicit AND operation in each row, so if the postal code doesn't match, the account won't get assigned to the territory even if you specified the city.
- The upper limit of the postal code range is "75222-9999" to include addresses with ZIP+4 postal codes. Entering 75222 as the upper limit wouldn't assign addresses with 75222-0002. The double quotation marks are required because you're entering a code with a hyphen. The entry for the upper limit isn't a real postal code, but that's OK for the pattern matching.

Here are a few more examples of postal code territories:

Country	State	Postal Code	Explanation
United States	Any	940%	Territory for all the postal codes starting with 940%, which include most of the San Francisco peninsula.

Country	State	Postal Code	Explanation
United States	Any	94065 - 94070	Territory for Redwood City and San Carlos, California. The rule doesn't assign accounts with 94070 ZIP+4 codes in the address because these are higher numerically than 94070. For example, this rule won't assign a San Carlos account at an address with the postal code 94070-0121.
United States	Any	94065 - "94070-9999"	Territory for Redwood City and San Carlos, California. This version correctly assigns accounts with 94070 ZIP+4 code, including 94070-0121.

Postal Code Assignment Example

Here's an example of how accounts are assigned using postal codes. Suppose you set up the following three territories:

Territory Name	Country	State	City	Postal Code
San Francisco	United States	Any	Any	941%
Western Arizona	United States	Any	Any	853%
Phoenix, Arizona	United States	Any	Any	85000-85299

When you run assignment on the following accounts:

Account Name	Address
Blue Semiconductor	100 Main Street, Phoenix, AZ 85254
Fantastic Laptops	500 East Main Street, Avondale, AZ 85338
First Software	2361 21st Avenue, San Francisco, CA
Compucon	500 Spear Street, San Francisco CA 94105-1548

Account Name	Address

You get these territory assignments:

Account Name	Assigned Territory
Blue Semiconductor	Phoenix, Arizona
Fantastic Laptops	Western Arizona
First Software	Not assigned to any of the territories because the postal code is missing.
Compucon	San Francisco

Available Address Elements

When you enable the Address dimension, you can enable any of the following address elements. You can use the additional attributes to accommodate the address elements that are required for some countries.

- Country
- State
- Province
- County
- City
- Postal Code
- Additional Attribute 1
- Additional Attribute 2
- Additional Attribute 3
- Additional Attribute 4
- Additional Attribute 5

How Sales Territories Support Assignment and Forecasting

Here's how sales territories support automatic assignment and sales forecasting.

Sales Territory Assignment

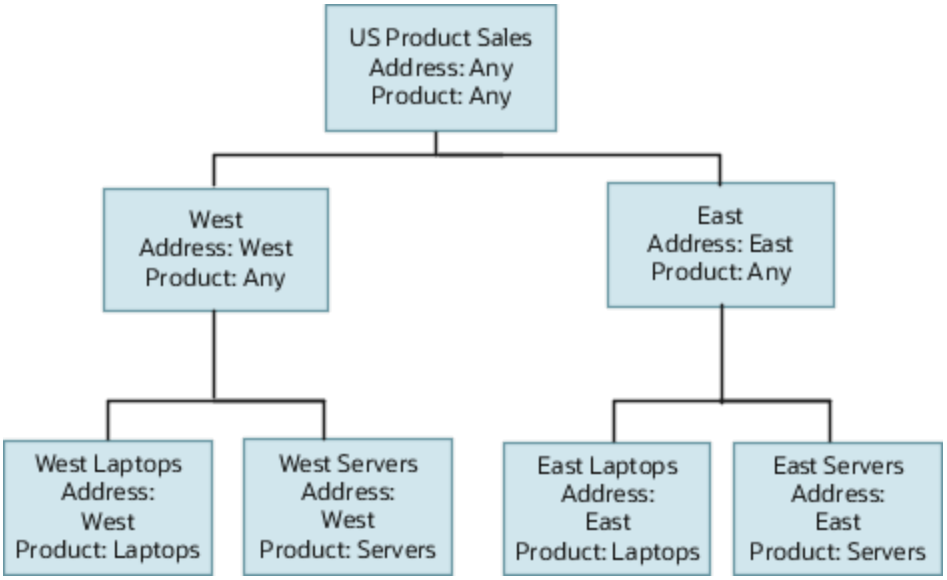
Sales territory assignment matches the values that you enter in the territory dimensions to the records you're assigning. The application:

1. Evaluates all territories regardless of their position in the sales territory hierarchy to see if there's a match.
2. Discards the ancestors of any of the matching territories.

Here's an example to illustrate how sales territories work in assignment and forecasting. Consider a simple territory hierarchy for a company that sells laptops and servers in the US:

- The company divides the US states and assigns them to two territories: East and West.
- The East and West territories are divided into two territories, one territory sells laptops and the other sells servers.
- The company requires only two territory dimensions to define territories: address and product.

Here's what the sales territory structure looks like:



Here are the values that you enter in the address and product dimensions for the example:

- A value of Any means that all values, even a missing value, match.
- The top territory in this hierarchy has a value of Any across all the dimensions making it the overall catchall territory.

  The application assigns all records not matching any of the coverage values of other territories to the overall catchall territory.
- The West and East territories have a value of Any for the Product dimension. They are the catchall territories for any opportunities in those regions for products other than laptops and servers.

Territory Name	Address	Product
US Product Sales	Any	Any

Territory Name	Address	Product
West	States in the western US	Any
East	States in the eastern US	Any
West Laptops	States in the western US	Laptops
West Servers	States in the western US	Servers
East Laptops	States in the eastern US	Laptops
East Servers	States in the eastern US	Servers

To assign accounts, assignment uses the address of the account only (there's no product information available in accounts). Here's how the application assigns an account with an address in New York:

1. Finds the following matching territories: East Laptops, East Servers, East, US Product Sales.

   East Laptops, East Servers, and East territories include New York explicitly in the list of states. US Product Sales has the value of Any in the address dimension.
2. Discards East and US Product Sales because these are parents and grandparents of the East Laptops and East Servers.

The application assigns the account to the East Laptops and East Servers territories.

For assigning opportunities, the application assigns each opportunity line separately. The assignment process uses the address of the account (each opportunity must be associated with an account). For example, here's how the application assigns an opportunity for servers and laptops in a New York account.

Here's how the application assigns the servers opportunity line:

1. Finds these matching territories: East Servers, East, and US Product Sales

   East Servers includes the correct product and state. East includes the state and Any as the value for the product. US Product Sales matches because it has Any for both dimensions.
2. Discards East and US Product Sales because these are parents and grandparents of East Servers.

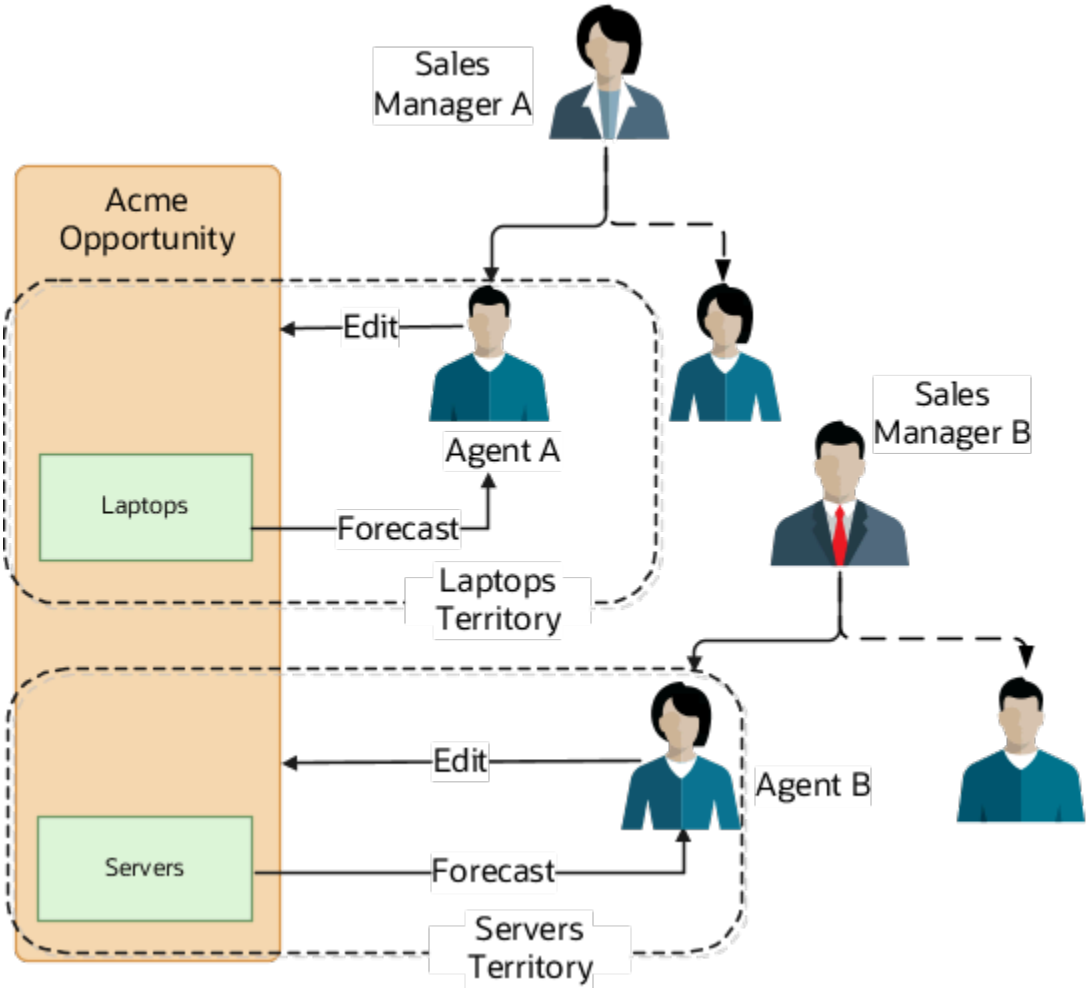
The application assigns the opportunity line to the East Servers territory. The application uses the same process to assign the laptop opportunity line to the East Laptops territory.

For the matching territories, assignment gives each territory owner edit access to the opportunity as a whole, and both territories are listed on the opportunity Team tab. Only the matching opportunity line is included in forecasts for that territory, however.

Here's a diagram that illustrates the different effects of territory assignment on opportunity access and forecasting. The diagram shows an opportunity for laptops and servers. Here's what happens when agent A owns the laptops territory and agent B owns the servers territory:

- Both agents gain edit access to the opportunity as a whole.
- Agent A can only forecast laptops.

- Agent B can only forecast servers.
- Agent A's and Agent B's managers (who are also the owners of the parent territories) gain access to the opportunity as a whole, but they get to view and adjust only the forecasts submitted by their subordinates.
- The colleagues of agents A and B don't have any visibility into the opportunity unless they have edit access to the account.



The Importance of Catchall Territories

Some of the values required for assignment may be missing from the records you're assigning and you may have gaps in your territory coverage. For these reasons, you must set up one or more catchall territories with `Any` as the value for each of your territory dimensions. The value of `Any` means that any value, even a missing value, is a match. The owner of the catchall territory, or another user you assign as a territory member, must monitor the catchall territory for records that didn't get assigned properly. You can adjust your territory structure over time to minimize the number of records assigned to the catchall territories.

Using the sample territory setup, an opportunity for service (a product not specified in any territory) in a Japanese account (a country not specified in any territory) is assigned to the overall catchall territory. An opportunity for service in California, gets assigned to the West territory because the West territory includes the rule: Country=US, State=CA.

How Sales Territories Work for Forecasting

You can enable two types of forecasts: Prime and Overlay. Forecasts designated as Prime forecast sales revenue. Overlay forecasts are designed to permit any overlay organization, such as sales support, to create a separate forecast. The overlay forecast isn't included as part of the sales revenue forecast. How forecasting works depends on the hierarchy of the sales territories you set up and the value you enter in the Enable Forecasting field for each territory. The Enable Forecasting field can have these values:

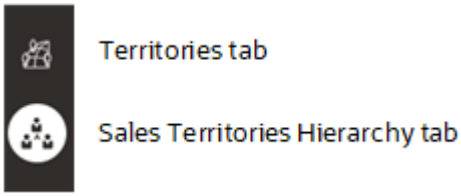
Enable Forecasting Field Value	Explanation
Prime only	The territory owner can forecast and adjust the sales revenue forecasts.
Overlay only	The territory owner can forecast and adjust forecasts that are not counted in the sales revenue forecast.
Prime and Overlay	The territory owner can adjust both types of forecasts.
Disabled	The territory owner is excluded from creating or reviewing forecasts.

The sales territory hierarchy that you set up determines how forecasts are passed up for adjustment and approval. In the example, the East Laptops and East Servers forecasts are automatically submitted to the owner of the East territory for adjustment. Then the forecasts are passed on to the US Product Sales territory owner. The western forecasts mirror that process.

Sales Territory UIs for Different Uses

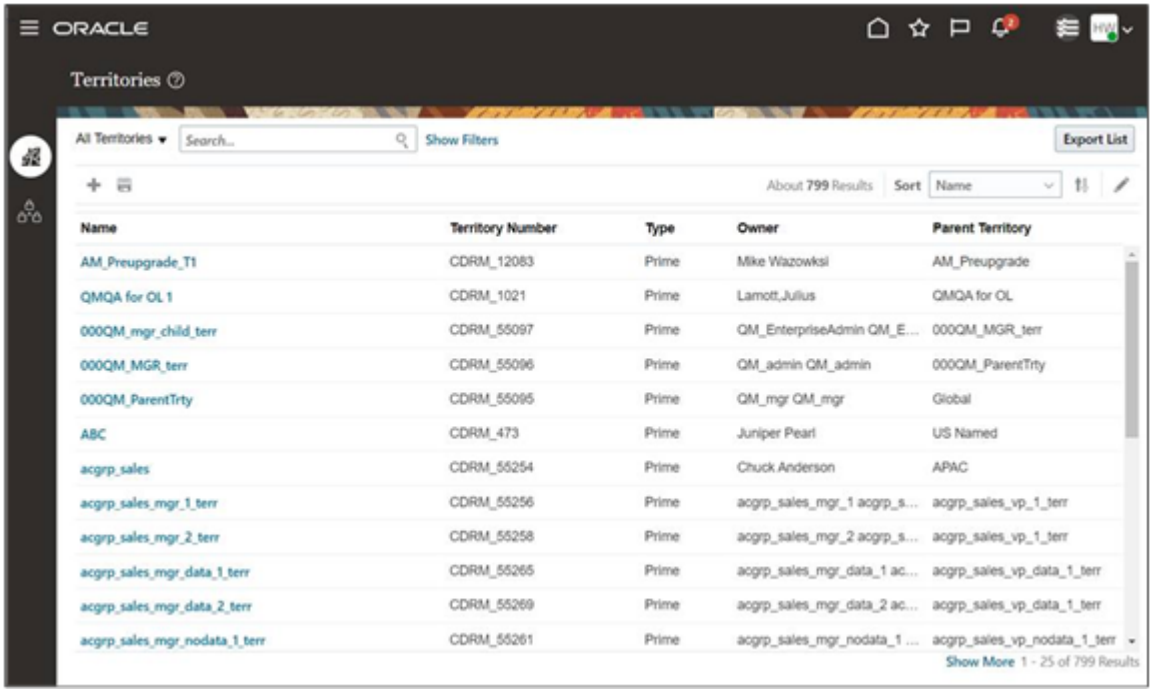
You have the option of using multiple UIs to manage sales territories. You can make changes to individual territory coverage and other adjustments in Workspace and in the Territories tab of the Territories work area. For creating territory hierarchies, you must use the Sales Territories Hierarchy tab of the Territories work area.

The Territories work area includes two tabs: a full-featured UI that's designed for setting up the territory hierarchy and a simpler UI that you can use for ongoing minor adjustments to territories after they're set up. Users can toggle between the two UIs by clicking the **Territories** and **Sales Territories Hierarchy** tabs on the left side of the Territories work area or in Workspace.



Territories Tab for Making Changes to Individual Territories

When you open the Territories work area, the application displays the Territories tab. The tab is optimized for sales managers who want to make simple changes to individual territories, such as changing territory owners or minor tweaks in coverage.



On this tab, you can add any prospect accounts as named accounts in your sales territories. In the Sales Territory Hierarchy Tab, the prospect accounts you add must be part of an account hierarchy below a customer account.

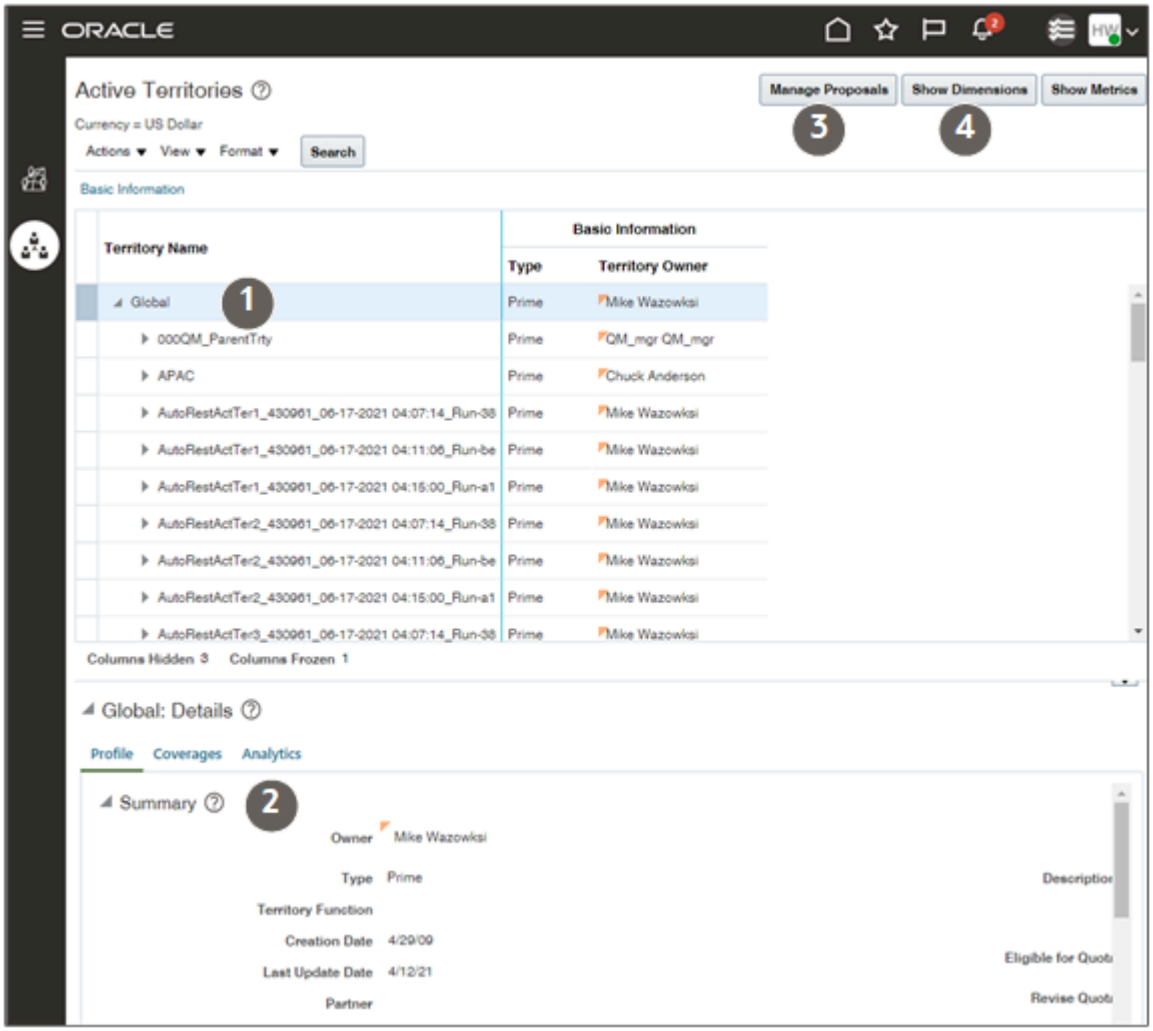
Note: If you want to use add accounts of type prospect to sales territories, make sure that the profile option Account Types Enabled for Assignment (ZCA_ASSIGNMENT_ACCT_TYPE_ENABLED) is enabled for prospects by setting the profile to `ZCA_CUSTOMER,ZCA_PROSPECT`, see the topic *Enable Prospects for Inclusion in Sales Territories*.

Sales Territories Hierarchy Tab for Building Your Sales Territory Hierarchy

To build sales territory hierarchies, you use the Sales Territory Hierarchies tab. On the Sales Territories Hierarchy tab, territory setup is done not on live territories, but in a proposal that you must activate after your setup is complete. Proposals make it possible to make territory revisions without affecting live territories and to create different versions to be used at different times.

Here's a screenshot of the Active Territories page on the tab. The callouts highlight and describe different features on the page.

Callout Number	Feature Description
1	The left pane of the Active Territories page displays the active territories as a collapsible hierarchy.
2	Selecting a territory, displays territory details at the bottom of the page.
3	Using the **Manage Proposals** button, you can create territory proposals with your territory changes.
4	The **Show Dimensions**,**Hide Dimensions** button lets you toggle the display of dimension details in the list of active territories.



Differences Between the Two UIs

Here are the major differences between what you can do in the two UIs. Whichever UI you're using to make your territory changes, your records aren't reassigned until the appropriate assignment process runs.

Feature	Sales Territory Hierarchies Tab	Territories Tab
Changing a territory owner or member	Your changes aren't effective until you activate the proposal.	Your changes take effect immediately.
Making changes without immediately effecting live territories	You create territories in a territory proposal that isolates your changes from existing active territories until you activate. You can even decide to create different proposals to go live in the future, to account for seasonal sales demands, for example.	Territory proposals aren't available. Changes you make to territories are immediate.
Inheriting the properties of parent territories	When you create child territories in both UIs, the child territories automatically inherit the properties and coverage of the parent	At creation, the child territories automatically inherit the properties and coverage of the parent territories. However, in the Territories

Feature	Sales Territory Hierarchies Tab	Territories Tab
	territories. In the Sales Territory Hierarchies Tab, you can also link territories so that any subsequent change in coverage for the parent territory is automatically reflected in the linked territory.	tab UI, you can't link the territories to make subsequent coverage changes reflected automatically.
Include prospect accounts in sales territories as named accounts.	You can only add prospect accounts that are part of an account hierarchy and below an account of type customer.	You can add any prospect account to a territory.

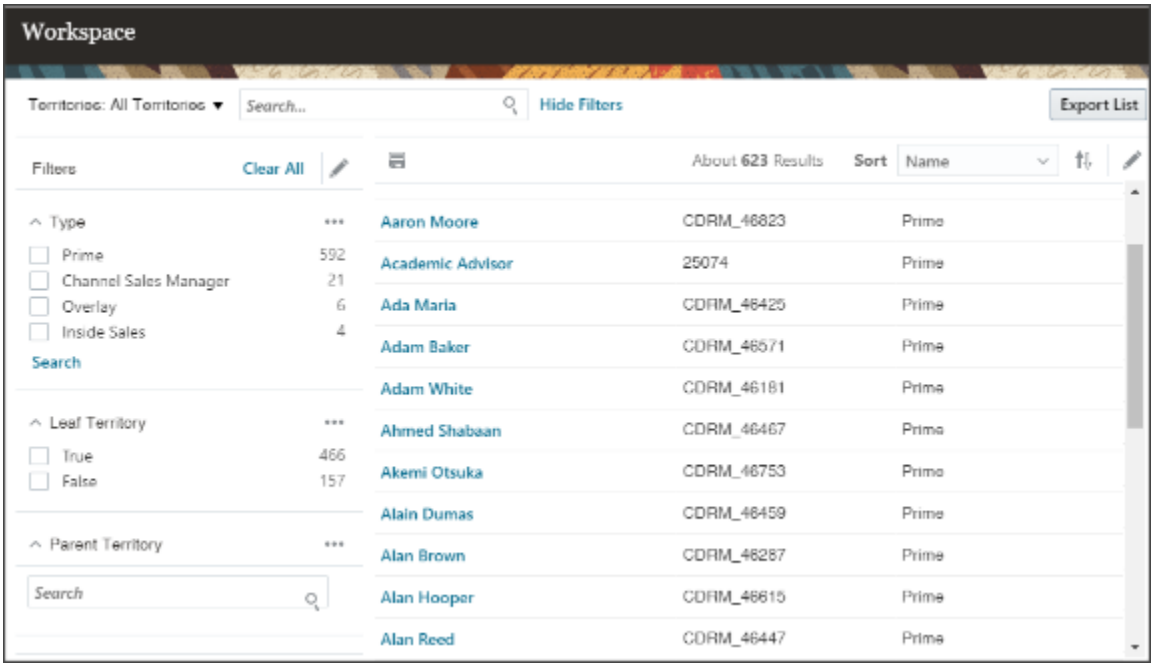
How You Can Make the Sales Territory Hierarchies UI the Default and Only UI

By default, users can toggle between both UIs using the tabs. You can make the Sales Territory Hierarchies UI the default UI and remove the tab controls. To change the defaults, all you have to do is set the system profile option Default to Territory Classic Interface (MOT_DEFAULT_CLASSIC_INTERFACE) to Yes. The setting, which is made at the site level, affects all users. You can edit the system profile value option from the Setup and Maintenance work area using the following:

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

Use Workspace for Resolving Territory Gaps and Overlap Issues

Managers who need to resolve territory gaps and overlap issues in existing territories, can also use Workspace. Both Workspace and the Territories work area let you search for territories not only by salespeople but also by dimension coverage details, such as included accounts, products, or geographies. The territories features in Workspace are the same as in the Territories tab in the Territories work area. What Workspace doesn't have is the ability to create and manage hierarchies. For that you must go to the Territories work area.



Can I include a prospect account in a sales territory?

Yes, you can include prospects as named accounts in sales territories.

> **Note:** Make sure that the profile option Account Types Enabled for Assignment (ZCA_ASSIGNMENT_ACCT_TYPE_ENABLED) is enabled for prospects by setting the profile to `ZCA_CUSTOMER,ZCA_PROSPECT`.

To add prospects to territories, use the Territories tab in the Territories work area. The Sales Territories Hierarchy tab, where you set up territory hierarchies using proposals, limits how you can add them. Here are the details of what you can do in each tab.

Territories Tab

On the Territories tab, you can add any account of type prospect to a live territory.

Sales Territories Hierarchy Tab

On the Sales Territory Hierarchy tab, you can:

- You can add prospect accounts only if they're child members of an account hierarchy for accounts of type customer.
- View and delete prospect accounts. These include prospect accounts that you added on the Territories tab that aren't part of a hierarchy.

Sales Territory Use Cases

Overview

This section uses very simple examples to illustrate how you set up sales territories to provide salespeople access to accounts and opportunities and how you enable them to forecast.

The examples use the two most frequently used dimensions: address and product. Here's what they cover:

- Automatically assigning access to individual salespeople by product or address.
- Automatically assigning access only to managers when salespeople manage and sell to their own accounts.
- Handling territories that don't roll up neatly by address or by product and to separate assignment and forecasting.
- Automatically assigning product specialists and others to help with a particular opportunity line using special territories, called overlay territories.
- How to set up catchall territories so executives don't have to troubleshoot territories.
- Ignoring or hiding the owner fields in the account and opportunity UIs and relying exclusively on sales territories and assignment rules to determine access.

As a rule, if you can draw the boundaries of sales territories along some dimension, then you should use sales territories to automatically assign access to accounts and opportunities to individual salespeople. Assigning salespeople using territories makes it easy for you to change the assignment when salespeople leave or are hired and to perform sales territory realignment. When you're realigning territories to balance the workload and to reward your top performers, you can experiment with different what-if sales territory scenarios in territory proposals. If you're dividing your territories by address and by product, then you can draw the territory boundaries for individual salespeople by either dimension.

Salespeople in a Region Sell Different Products to the Same Customers

Suppose, for example, that salespeople in a particular region sell different types of products to the same customers. You want salespeople to coordinate their engagement with each customer and to be always included on those opportunities that involve their products.

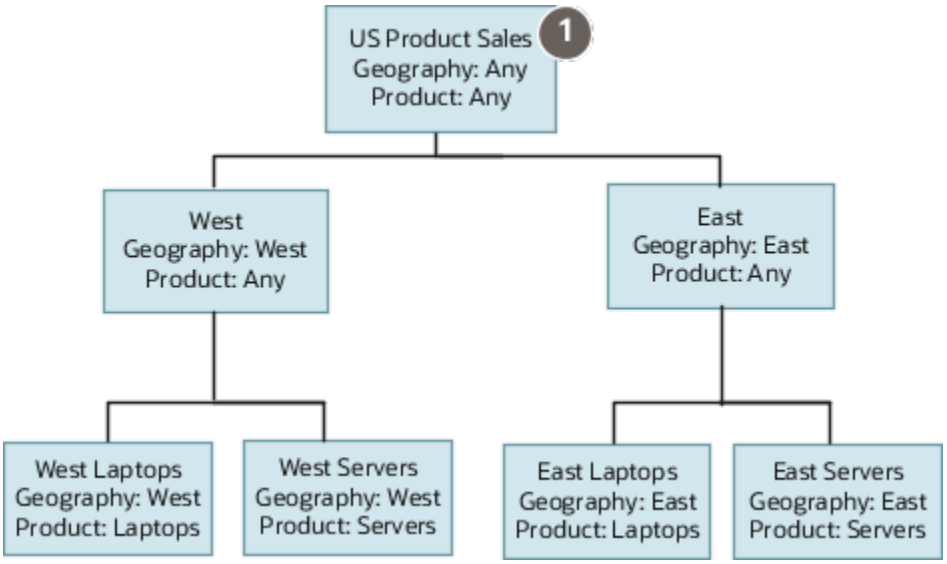
You know which salespeople work in each region, so you can use territories to provide them with edit access to all accounts in their region using the address dimension. You can then assign salespeople to opportunities when their products are involved using the product dimension.

Territory Setup

The US product sales organization is divided into two regions: West and East. Each regional office includes a manager and two salespeople who sell different products: one sells laptops and the other servers.

Here's a diagram of the sales territory hierarchy. You must always create at least one catchall territory with the value of Any for each of your dimensions. The overall catchall territory is the topmost territory (callout 1), but both the West and

East territories serve as catchall territories for the product dimension. For the Address dimension, you must list every state in each territory.



Here are the key entries for the territories in this example. Territory Type is always set to **Prime** because all territories are used for sales revenue forecasting. The Enable Forecasting field is always set to **Prime only**, enabling the territory owner to participate in sales revenue forecasting. For the Address dimension coverage, you must enter a separate line for every state.

Territory Name	Territory Type	Address	Product	Enable Forecasting
US Product Sales	Prime	Any	Any	Prime only
East	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Any	Prime only
East Laptops	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Laptops	Prime only

Territory Name	Territory Type	Address	Product	Enable Forecasting
East Servers	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Servers	Prime only
West	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Any	Prime only
West Laptops	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Laptops	Prime only
West Servers	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Servers	Prime only

How Assignment Works for This Scenario

When a lead comes in for a potential customer with an address in California who is interested in purchasing laptops, the inside sales team converts the qualified lead into an account and opportunity. The application does the following:

- Assigns the West Laptops and West Server territories to the account because California matches the address dimension. The owners of the territories gain full access to the account and can share information about their interactions with the customer. Full access means they can add other team members in addition to editing the account information itself.

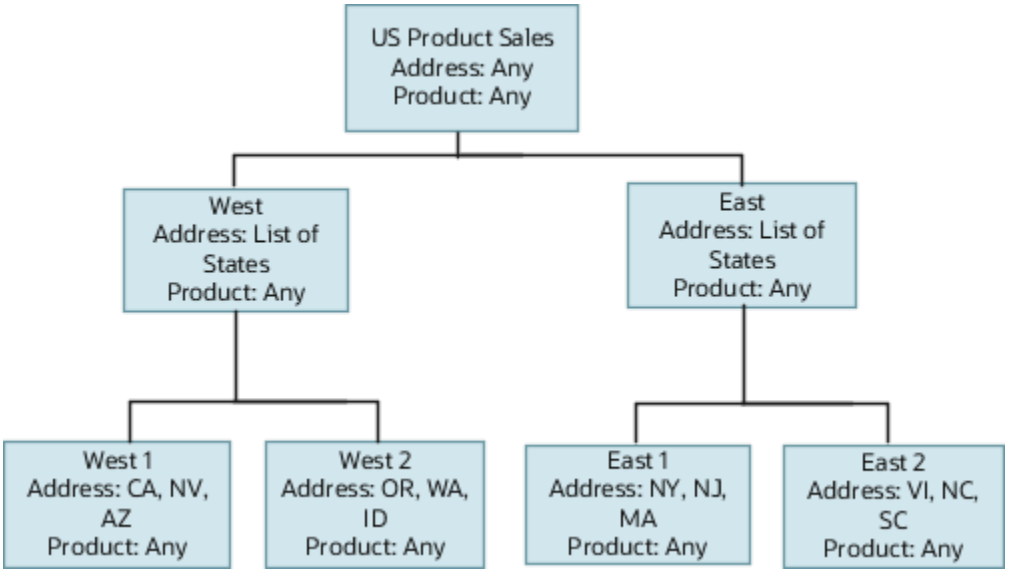
- If the account is missing the state in the address, the application assigns the account to the catchall territory, US Product Sales.
- Assigns the West Laptops territory to the opportunity line using the product dimension and the address of the account. The laptop revenue can now be forecast by the West Laptops territory owner.
- If the opportunity line for the California account is for products other than laptops and servers, then the application assigns the opportunity line to the West territory.

Salespeople Sell All Products to Customers in Their Region

If you draw boundaries purely by address elements in a geographical region, then each salesperson handles customers in their particular region and sells all of the products into that region.

Territory Setup

Here's a diagram of a sample territory structure. The West and East regions split the states in the US. Each of the two regional territories are split again. You must list every state in each territory.



Here are the territories for this example and the key entries for each. For the Address dimension coverage, you must enter a separate line for every state. The Product dimension value is always Any because salespeople sell all products. You could choose not include the Product dimension at all if you're not going to be using products for assignment elsewhere in your territory hierarchy. The Territory Type is always set to **Prime** and the Enable Forecasting field to **Prime only**

Territory Name	Territory Type	Address	Product	Enable Forecasting
US Product Sales	Prime	Any	Any	Prime only
East	Prime	• Country: United States, State: NY	Any	Prime only

Territory Name	Territory Type	Address	Product	Enable Forecasting
		• Country: United States, State: NJ • Country: United States, State: MA • Country: United States, State: FL And entries for all the remaining 21 states in the eastern half of the US		
East 1	Prime	A subset of the states in the east: NY ,NJ, MA, RI, and so on.	Any	Prime only
East 2	Prime	A subset of the states in the east: VI, NC, SC, FL, and so on.	Any	Prime only
West	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ • Country: United States, State: NM And entries for all the remaining 21 states in the western half of the US	Any	Prime only
West 1	Prime	A subset of the states in the west: CA, NV, AZ, and so on.	Any	Prime only
West 2	Prime	A subset of the states in the west: OR, WA, ID, MT, UT, NM, and so on.	Any	Prime only

How Assignment Works for This Scenario

When a lead comes in for a potential California customer who's interested in purchasing laptops, the inside sales team converts the qualified lead into an account and an opportunity. Here's what the application does:

- Assigns the West 1 territory to the account because California is in the West 1 territory. The salesperson in the territory gains edit access as does her management chain.
- Assigns the West 1 territory to any opportunity line for the California account using the account address.
- If the account is missing the state in the address or is located in another country, then the application assigns the account to the catchall territory: US Product Sales.

Salespeople in Each Region Manage Their Own Accounts and Sell All Products to Those Accounts

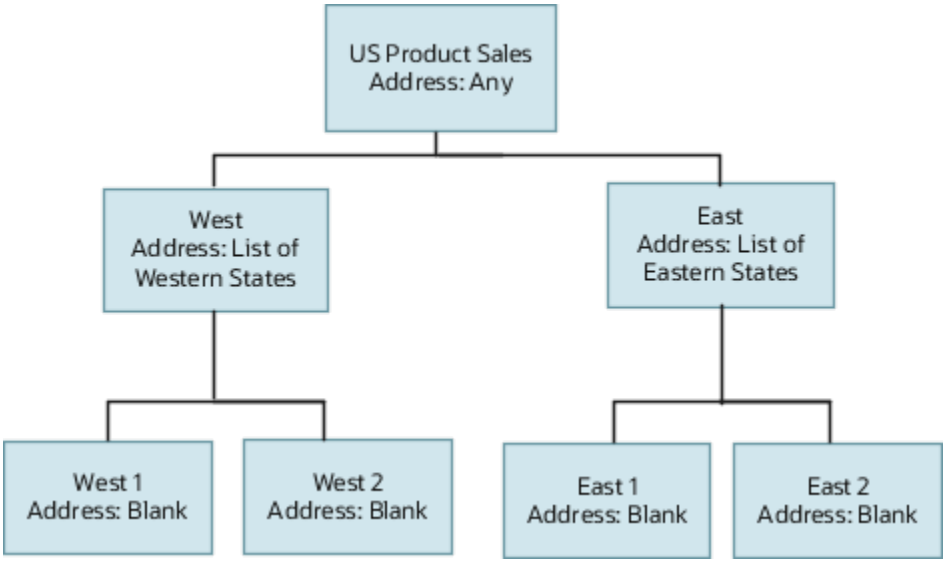
If individual salespeople in each region manage their own customer relationships and sell all products to those customers, then there may be no way of drawing sales territories to assign new accounts to them directly.

Instead, you can automatically assign access to the managers in each region and have the managers distribute the accounts to the salespeople working for them. Even though you are not assigning records to individual salespeople, you must still set up territories for them so they can forecast.

Territory Setup

Because everyone sells all products, you can set up sales territories by address only for the managers. For salespeople, you create territories with no coverage for the address dimension so the territories get skipped over by assignment but can be used for forecasting. A territory with no coverage is blank, has no entry, for any dimension.

Here's a diagram that shows the territory hierarchy using only the address dimension. You must list all the appropriate states in the West and East territories. An entry of Blank means the territory has no address coverage (no accounts are assigned automatically). Because all salespeople sell all products, the product dimension is not required unless you are using products in overlay territories or other portions of your territory setup.



Here are the key entries for each territory. Territory Type is always set to **Prime** because all territories are used for sales revenue forecasting. The Enable Forecasting field is always set to **Prime only**, enabling the territory owner to participate in sales revenue forecasting.

Territory Name	Territory Type	Address	Enable Forecasting
US Product Sales	Prime	Any	Prime only
East	Prime	• Country: United States, State: NY	Prime only

Territory Name	Territory Type	Address	Enable Forecasting
		• Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	
East 1	Prime	Blank	Prime only
East 2	Prime	Blank	Prime only
West	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Prime only
West 1	Prime	Blank	Prime only
West 2	Prime	Blank	Prime only

Child territories automatically inherit the coverage of their parent when you create them, so you must delete the inherited coverage to make them blank. For details on how to delete the coverage for a territory, see the Creating a Territory with No Coverage topic.

How Assignment Works for This Scenario

When a lead comes in for a potential customer with an address in California who is interested in purchasing laptops, the inside sales team converts the qualified lead into an account and opportunity. Here's the assignment process:

1. The application automatically assigns the new account to the West territory using the address dimension.
2. The manager who owns the West territory (or a sales administrator working on the manager's behalf), edits the salesperson's territory and includes the account by name.
3. Running territory assignment automatically assigns the opportunity lines for that account to the same salesperson as well.

If an account is missing the state information or the account is in a country other than the US, then the account is assigned to the catchall territory, US Product Sales.

> **Note:** Because the accounts are assigned by name to the territories, administrators must manually move the accounts during territory realignment.

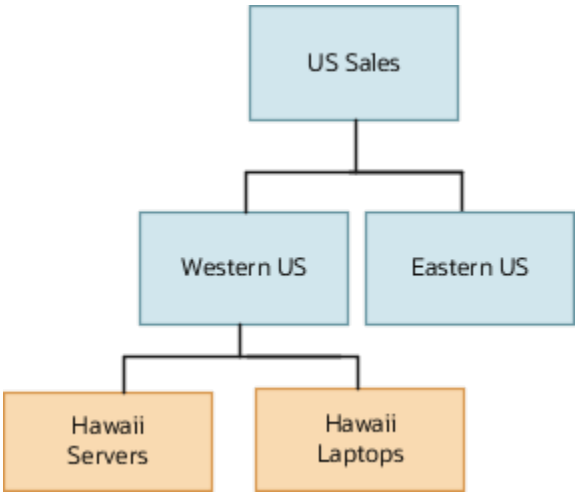
Irregular Territory Hierarchies Where Territories Don't Roll Up to the Same Parent

Normally, the coverage values in the child territories roll up to the parent. For example, the territory selling laptops in Hawaii and the territory selling servers in Hawaii both roll up to the territory selling products in the western US.

But what if the VP of US sales decides to take over the Hawaii servers territory for herself so she can play golf? Now the two Hawaii territories roll up to different levels in the territory hierarchy. You could end up with wrong assignments and duplicate forecasts. This topic explains how you can assure proper assignment and forecasting by creating parent territories with no coverage. A parent territory with no coverage still gets the forecasts from the children territories, but it's skipped over for assignment. Creating sales territories with no coverage effectively separates assignment and forecasting. Here are two scenarios to illustrate the difference between a regular hierarchy and an irregular one.

Regular Address Hierarchy

Here's a diagram illustrating the structure of a simple regular address hierarchy. The Western US territory includes territories for the western states and the Eastern US territory includes all the territories for the eastern states. The Western US territory is the parent of both Hawaii Servers and Hawaii Laptops.



Here are the entries for the territories in the diagram.

Territory Name	Territory Type	Address	Product
US Sales	Prime	Any	Any
Eastern US	Prime	States in the eastern US.	Any
Western US	Prime	States in the western US.	Any
Hawaii Servers	Prime	Hawaii	Servers
Hawaii Laptops	Prime	Hawaii	Laptops

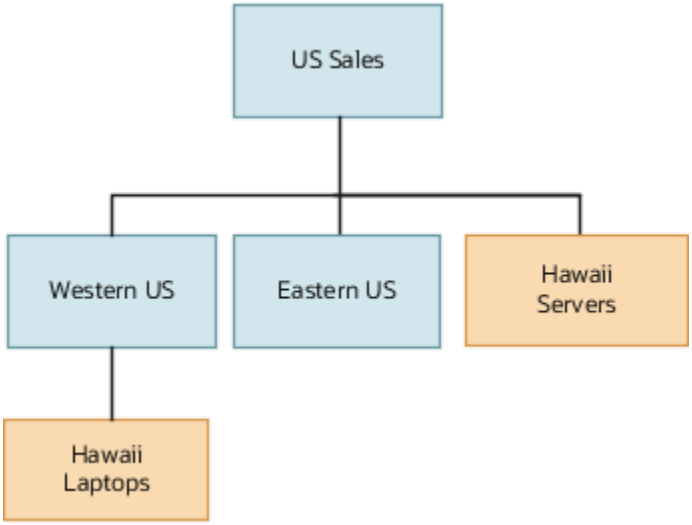
Territory Name	Territory Type	Address	Product

Here's how the application assigns accounts and opportunities using this territory setup:

- An account in Hawaii is automatically assigned to both the Hawaii Servers and Hawaii Laptops territories.
- An opportunity for a server in a Hawaii account is assigned to the Hawaii Servers territory. An opportunity for a laptop goes to the Hawaii Laptops territory.
- An opportunity for a service product in Hawaii is assigned to the Western US.

Irregular Address Hierarchy

Now imagine that the Vice President for US Sales likes to play golf in Hawaii, so she decides to handle one of the Hawaii territories herself. The resulting territory structure splits Hawaii across two different hierarchy levels. The Hawaii Servers territory is now a child of US Sales, while the Hawaii Laptops territory remains under Western US. The following figure reflects the change.



If you keep the territory settings the same and the same opportunity comes in for servers in the Hawaii account, the application assigns both the Western US and Hawaii Severs territories.

Here's how the application arrives at the assignment:

1. The application first checks for all possible matching territories. These are Western US, Hawaii Servers, and US Sales
2. The application discards all the ancestors of the matching territories: US Sales is a parent of Western US so gets discarded.

Because the opportunity is assigned to two territories in the hierarchy, it could end up in both territory forecasts and being counted twice in revenue projections. You can fix the assignment issues in this example by creating the Western US territory with blank coverage. Having blank coverage (no coverage in all the territory dimensions) means that the territory gets skipped for assignment, but still allows for forecasting to roll up as before. Here are the revised entries:

Territory Name	Territory Type	Address	Product
US Sales	Prime	Any	Any

Territory Name	Territory Type	Address	Product
Eastern US	Prime	States in the eastern US.	Any
Hawaii Servers	Prime	Hawaii	Servers
Western US	Prime	Blank	Blank
Hawaii Laptops	Prime	Hawaii	Laptops

The application now assigns only the Hawaii Servers territory. Here's how the application arrived at the assignment:

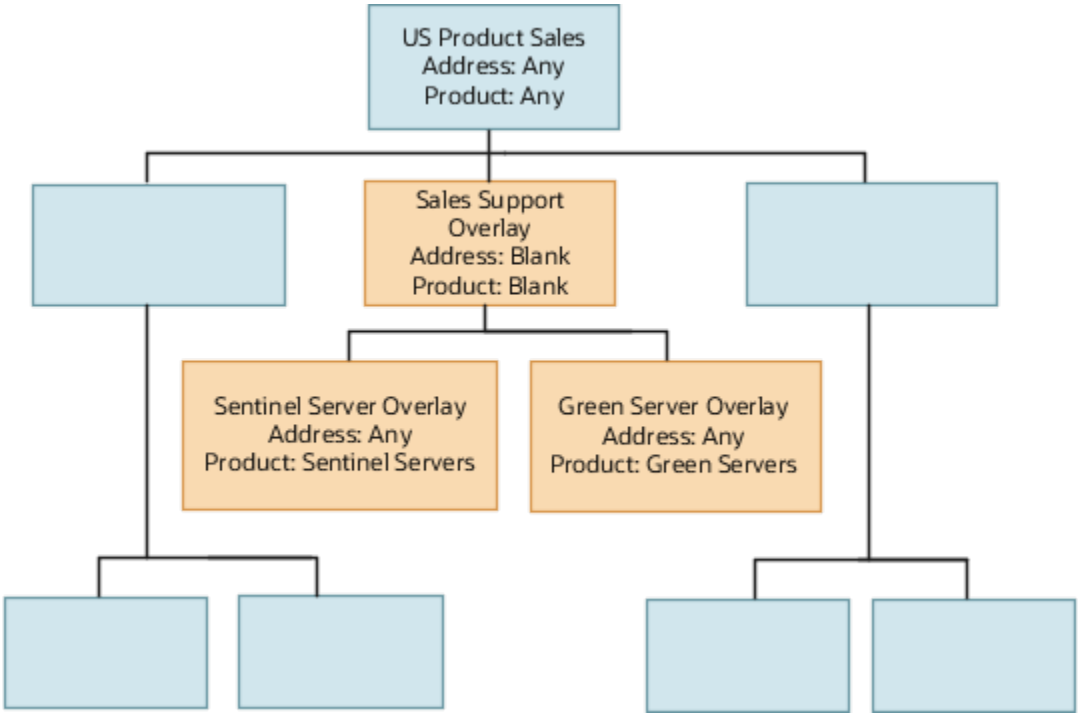
1. The application first checks for all possible matching territories. These are Hawaii Servers, and US Sales.
2. The application discards all the ancestors of the matching territories: US Sales is a parent of Hawaii Servers and so gets discarded.

How to Assign Outside Help Using Overlay Territories

Sometimes you want to assign others in your organization to assist with a sale. For example, if an opportunity line includes complex equipment, product specialists may be required to help with the technical details. You can make such assignments using overlay territories.

Sales Territory Setup

This diagram shows a simple overlay organization in a sales territory structure. The overlay organization consists of a manager and two product specialists. Each specialist is automatically assigned to help with the sale of a specific server model. The overlay organization territories are the children of the US Product Sales catchall territory for convenience.



The table lists the key entries for each overlay territory. Note the following:

- The Territory Type is always set to **Overlay**.
- For the Sales Support Overlay territory, the values of both dimensions are blank. This ensures the territory is not assigned to any account or opportunity.
- The Enable Forecasting column for the overlay territories can be set to **Disabled** or **Overlay Only**.
    - Use **Disabled** if you're not forecasting overlay territories.
    - Use **Overlay Only** if your overlay organization creates its own forecasts for the sales where they're involved. Such overlay forecasts are not counted as part of the sales organization forecasts to prevent double counting. If you do enable overlay forecasting, then you must set the value for manager territories that approve or adjust forecasts for both prime and overlay territories, such as US Product Sales, to **Prime and Overlay**. Enabling forecasts by overlay territories also requires additional setup so salespeople can specify overlay credit on the opportunity UI itself. See the Implementation Reference guide for details.

Territory Name	Territory Type	Address	Product	Enable Forecasting
US Product Sales	Prime	Any	Any	Prime or Prime and Overlay
Sales Support Overlay	Overlay	Blank	Blank	Disabled or Overlay Only
Sentinel Server Overlay	Overlay	Any	Sentinel Servers	Disabled or Overlay Only
Green Server Overlay	Overlay	Any	Green Servers	Disabled or Overlay only

Child territories automatically inherit the coverage of their parent when you create them, so, for the Sales Support Overlay territory, you must delete the inherited coverage as described in Creating a Territory with No Coverage topic.

How Assignment Works for This Scenario

The application assigns both the prime and overlay territories at the same time. Here is the detail for the assignment of overlay territories:

- The application assigns both the Sentinel Server Overlay and Green Server Overlay territories to all accounts because the Address dimension is set to Any. This provides the overlay team access to account notes, activities, and other details they need if they engage with the account.
- The application assigns the Sentinel Server Overlay and Green Server Overlay territories only to opportunities with server products in those two product groups.

What to Do When You Don't Want Executives Handling Catchall Territories

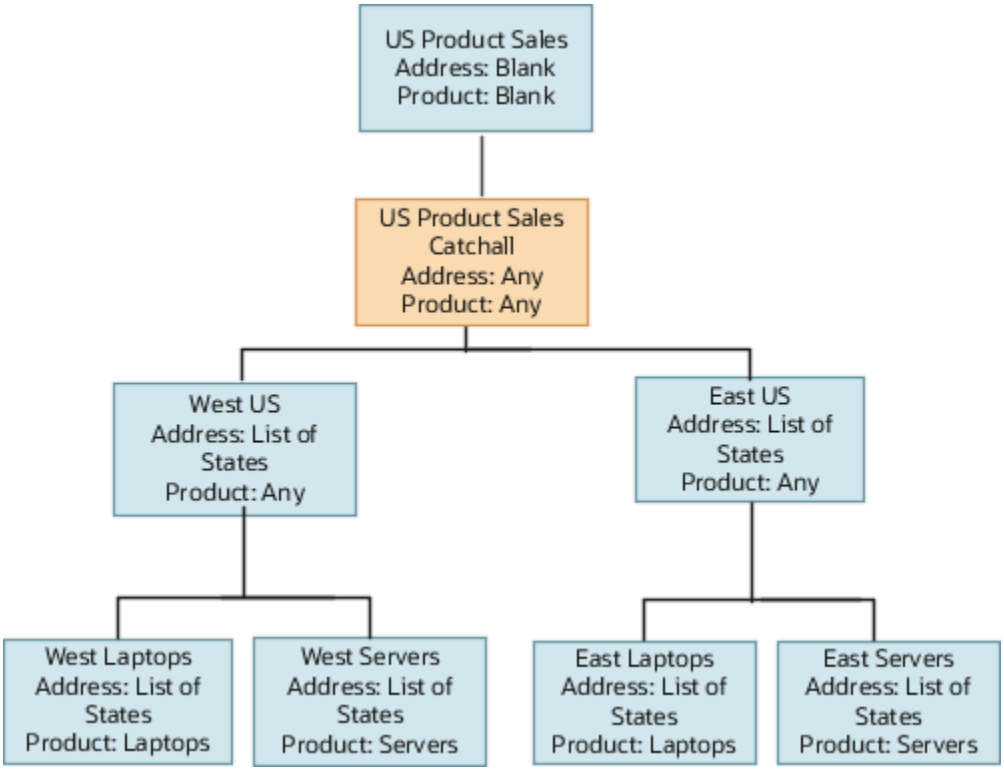
If you don't want your execs troubleshooting account and opportunity assignment, read on. Catchall territories are territories high up in the territory hierarchy that have a value of Any for some or all of the territory dimensions.

Your organization must monitor the catchall territories to identify and reassign records with incomplete data and to adjust for any gaps in your territory structure. The territories at the top of your hierarchy are usually owned by sales executives who aren't involved in territory troubleshooting. You can make it possible for others to manage the troubleshooting in either one of two ways:

- You can add the sales administrator as a member of the top catchall territory. As a territory member, the sales administrator can troubleshoot assignment, but she also gains access to all the forecasts the executive is reviewing.
- You can create two territories: one for the executive and one for the administrator right underneath in the hierarchy. The executive's territory gets a blank coverage (no coverage), so no accounts or opportunities are assigned. The administrator gets the catchall territory, with Any as the value for the appropriate dimensions.

When you create separate territories, the executive can review and adjust all the forecasts from the sales team. The owner of the catchall territory gets to troubleshoot any accounts or opportunities that aren't properly assigned. You can turn off forecasting for the catchall, so that the catchall territory owner doesn't see the forecasts the executive is approving.

Here's a diagram of a sample territory hierarchy with a separate overall catchall territory. The separate overall catchall territory, US Product Sales Catchall, is a child of US Product Sales and the parent of the next level of territories: West US and East US. A catchall must be a parent node. It cannot be a leaf node in the hierarchy.



Here are the setup details for the territories. A value of Blank for the top territory means that you removed coverage, assuring that no accounts or opportunities are assigned to that territory. Entering the value Disabled in the Enable Forecasting field for the catchall territory, disables access to forecasting for the territory owner.

Territory Name	Territory Type	Address	Product	Enable Forecasting
US Product Sales	Prime	Blank	Blank	Prime
US Product Sales Catchall	Prime	Any	Any	Disabled
West US	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Any	Prime
West Laptops	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ	Laptops	Prime

Territory Name	Territory Type	Address	Product	Enable Forecasting
		And entries for all the remaining 22 states in the western half of the US		
West Servers	Prime	• Country: United States, State: CA • Country: United States, State: NV • Country: United States, State: AZ And entries for all the remaining 22 states in the western half of the US	Servers	Prime
East US	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Any	Prime
East Laptops	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Laptops	Prime
East Servers	Prime	• Country: United States, State: NY • Country: United States, State: NJ • Country: United States, State: MA And entries for all the remaining 22 states in the eastern half of the US	Servers	Prime

How to Get Rid of the Owner Field and Rely on Automatic Assignment Exclusively

If you want to rely on sales territories or assignment rules to provide access to accounts, opportunities, and leads, you have to get rid of the owner field somehow. That's because you can't automatically assign ownership of accounts, opportunities, and leads.

Whoever creates a record becomes its owner and ownership provides edit access to data, including the ability to assign others to the sales team and reassign ownership. Here's how to get rid of the field from the UI:

- By default, each work area displays a list of records owned by the user, called My Opportunities, My Accounts and so on. You can replace these default lists with your own lists displaying records in user territories.
- You can also remove the infolets summarizing owned records from the Sales Infolet page.
- You can hide the field itself in the UI by creating custom layouts in Application Composer.

If you're concerned about unauthorized access by owners, you can create a dummy user and assign ownership of all records to that dummy resource. Whatever solution you explore, you must keep in mind that the owner field assures that the creator of a record retains access to that record.

How to Provide Managers in Completely Different Sales Regions with Access to Everything

Accounts for large multinational corporations are typically assigned to sales teams in different countries or regions. That creates a problem. By default, managers in each region can only access information in their own region.

No single manager can access all of the accounts and opportunities for the entire multinational. You can use a combination of account hierarchies and sales territory setup to provide access. By including the account at the top of the multinational hierarchy in the territory of a manager, you provide edit access to all accounts and opportunities in the hierarchy, regardless of where the're located. Managers get access to the account you include in the territory, and to all the accounts below it in the hierarchy. So, you can also use this method to provide access to a subset of the hierarchy.

Setup Summary

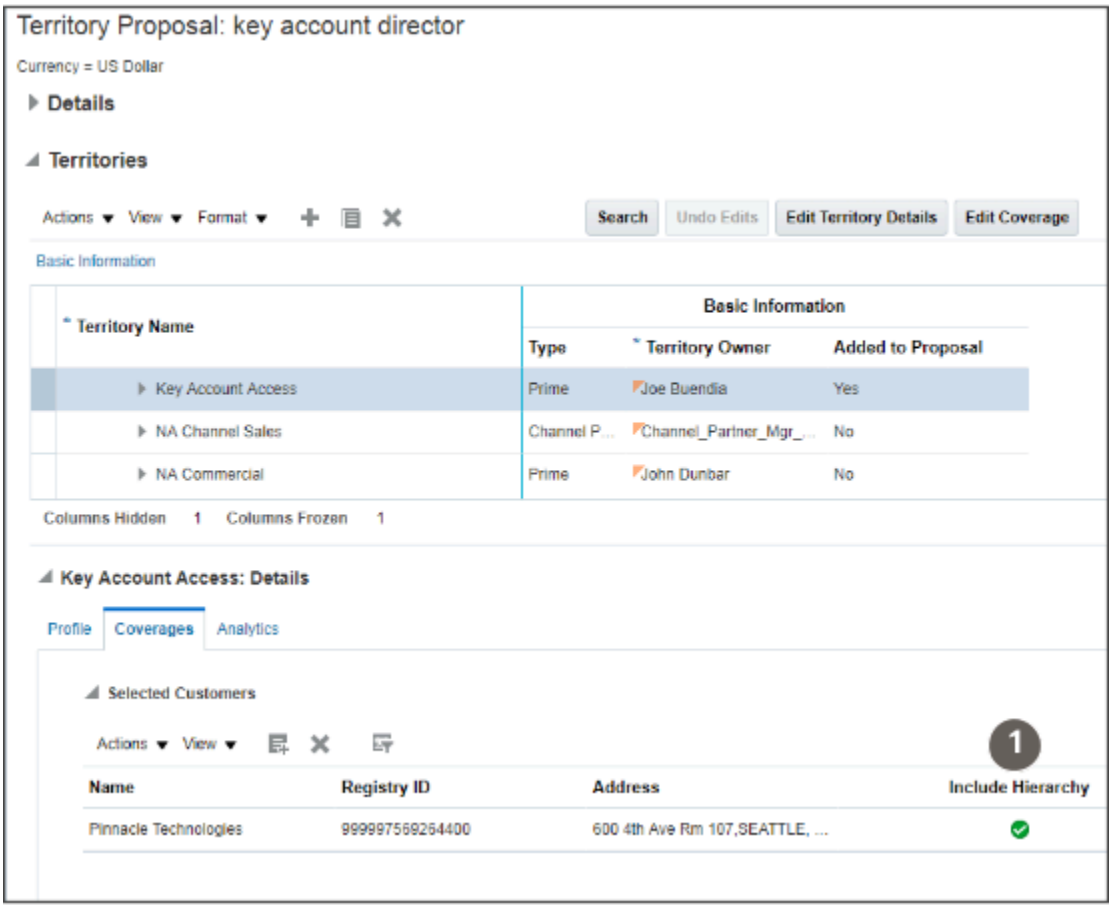
1. Create the account hierarchy either directly in the Edit Account UI or by importing the hierarchy as described in this guide.

2. Include the top account or another account in the hierarchy:

    a. Create the territory in a territory proposal.
    b. On the Coverages tab in the Included Customers, Selected Customers region, click **Select and Add**.
    c. In the Select and Add window, search for the account by name or other criteria.
    d. Click **Save and Close** to include the account and return to the Coverages tab.
    e. Select the account and click **Include Hierarchy**.

    The Include Hierarchy indicator appears in the Include Hierarchy column.

    Here's a screenshot of a sample territory in the Territory Proposal page with the Pinnacle Technologies account included on the Coverages tab. The presence of the Include Hierarchy indicator (callout 1) means that the territory owner has edit access to all of the accounts in the hierarchy below the Pinnacle Technologies account.



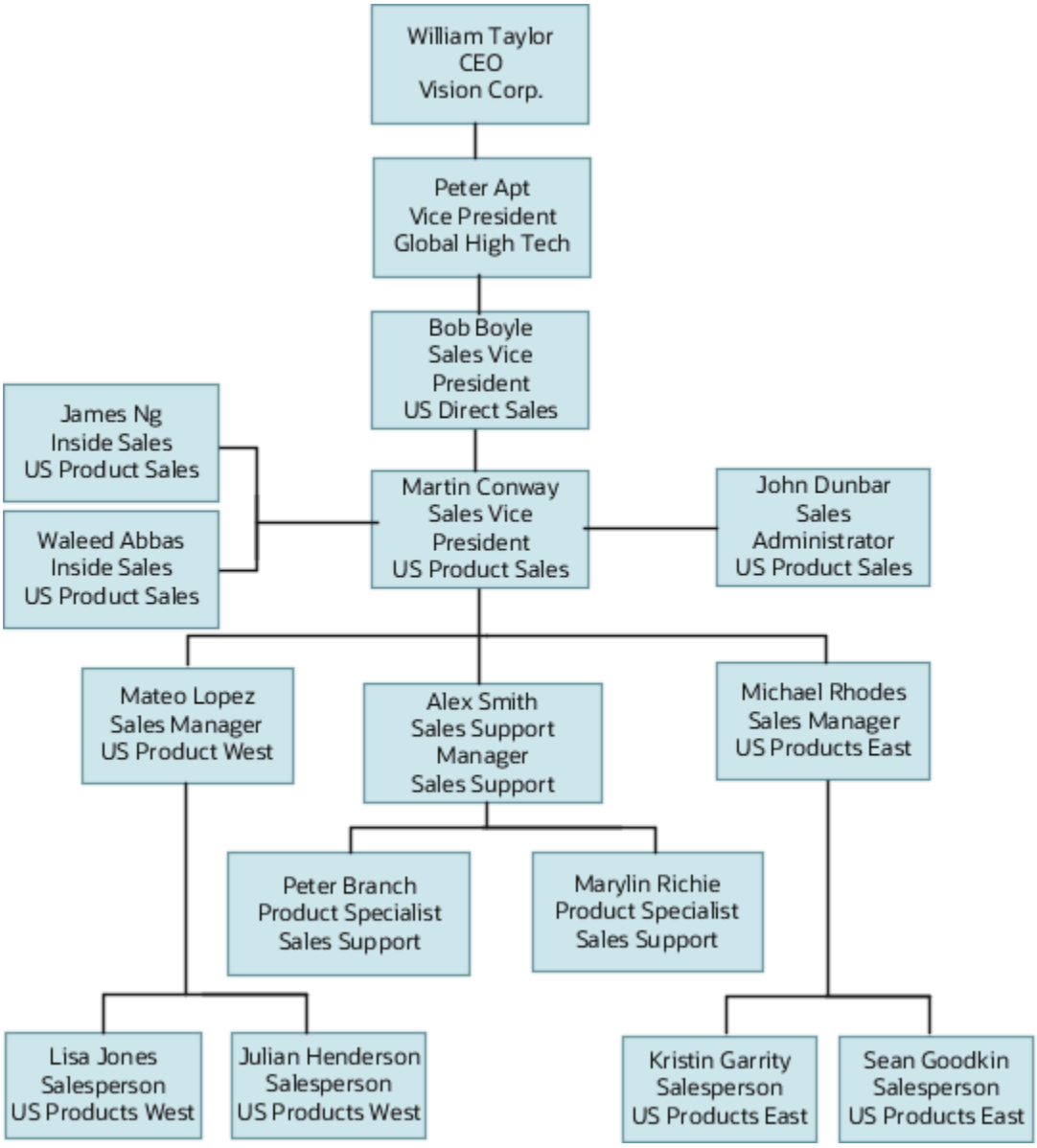
Sales Territory and Assignment Setup for the Vision Corp. Use Case

This topic explains the use case for the sales territory setup detailed in this chapter. The fictitious Vision Corp. divides its field sales organization for the US into two regions, East and West.

Each regional sales organization includes two salespeople, one sells laptops and the other servers. A sales support organization helps out with sales of technically complex server products. The organization includes a sales administrator who monitors and refines the territory assignment and two inside sales representatives who qualify leads.

The Organization and Use Case

Here's the Vision Corp. sales resource hierarchy you set up earlier.



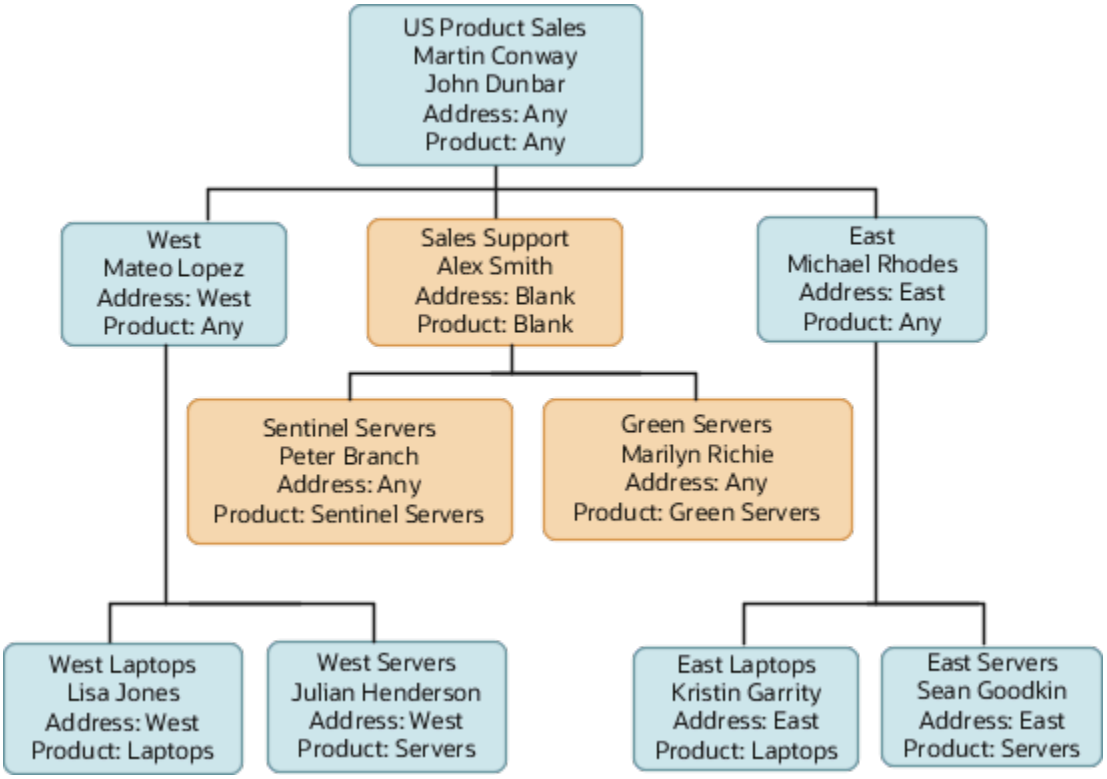
Sales Territory Setup

Vision Corp. creates territories using the address and product dimensions. Here's a diagram that shows the sales territory structure:

- The top territory, US Product Sales, is the overall catchall territory.

  The territory is owned by Martin Conway and includes the sales administrator John Dunbar. John Dunbar can troubleshoot any accounts and opportunities that are assigned to the overall catchall territory and also to the West and East catchall territories. By monitoring the catchall territories, John can refine the territory structure over time and fill in any gaps.
- The Sales Support territory owned by Alex Smith has blank (no value) entries for Address and Products coverage. No accounts and opportunities are assigned to him because he only manages the product specialists working for him.

- Peter Branch and Marilyn Richie are assigned to help with opportunities that involve their products, Sentinel Servers or Green Servers.
- The inside sales representatives do not have any territories because they qualify leads assigned to them using rules you set up as part of the Leads chapter.



Here are the key entries for the territories:

- Entries in the Product dimension column are the product groups in the sales catalog. Selecting a product group includes all the product groups and products nested within the product group.
- Vision Corp. is forecasting sales only. There's no forecast for the sales support organization. For this reason, the Enable Forecasting column value for the overlay territories is set to Disabled. For the prime territories, the value is Prime Only.
- The Sales Support territory has no coverage values so it doesn't get assigned to any accounts and opportunities. Because each child territory automatically inherits the coverage of its parent, you must delete the coverage to make it blank. For details, see the Create a Territory with No Coverage topic.

Territory Name	Territory Owner	Territory Type	Address	Products	Enable Forecasting
US Product Sales	Martin Conway John Dunbar	Prime	Any	Any	Prime only
East	Michael Rhodes	Prime	Arkansas and all the other states in the eastern US	Any	Prime only

Territory Name	Territory Owner	Territory Type	Address	Products	Enable Forecasting
East Laptops	Kristen Garrity	Prime	Arkansas and all the other states in the eastern US	Laptops	Prime only
East Servers	Sean Goodkin	Prime	Arkansas and all the other states in the eastern US	Servers	Prime only
Sales Support	Alex Smith	Overlay	Blank (no value)	Blank (no value)	Disabled
Sentinel Servers	Peter Branch	Overlay	Any	Sentinel Servers	Disabled
Green Servers	Marilyn Richie	Overlay	Any	Green Servers	Disabled
West	Mateo Lopez	Prime	Alaska and all the other states in the western US	Any	Prime only
West Laptops	Lisa Jones	Prime	Alaska and all the other states in the western US	Laptops	Prime only
West Servers	Julian Henderson	Prime	Alaska and all the other states in the western US	Servers	Prime only

How It Works

Vision Corp. runs the assignment process once a day in off-peak periods to assign new accounts or opportunities and qualified leads. Here's an outline of how assignment works for accounts:

- The application assigns an account to both the prime and overlay territories using the state the account is located in. A new account in Alaska gets assigned to West Laptops, West Servers, Sentinel Servers, and Green Servers territories. The owners and members of these territories gain access.
- If the account information is missing a state for some reason or is in a country other than the US, then the application assigns the account to the US Product Sales. Sales administrator John Dunbar reviews and troubleshoots the accounts assigned to this catchall territory.

The application assigns opportunities and qualified leads using the address information from the account and the product in each opportunity. For forecasting purposes, each opportunity line is assigned individually to territories and the territory owner gets to forecast only that line, but the territory owner gains edit access to the whole opportunity and the territory is listed on the opportunity Sales Team tab:

- An opportunity for green servers in an Alaska account, gets assigned to the West Servers prime territory and to the Green Servers overlay territory.
- An opportunity for laptops in the same Alaska account, gets assigned to the West Laptops prime territory only.

- An opportunity for both green servers and laptops in the same Alaska account, gets assigned the West Laptops, West Servers prime territories and the Green Servers overlay territory. All three territory owners gain edit access to the opportunity and the territories show up in the opportunity Sales Team tab. Although each territory member gains access to the opportunity as a whole, the forecasts for each of the prime territories include only their specific products.
- If an opportunity for the Alaska account includes a product not included in any of the territory coverages, then the application assigns the West territory.

Enable Sales Territory Dimensions

You must enable the sales territory dimensions that you plan to use for your sales territories. Make sure you complete any prerequisites for the dimension you want to use.

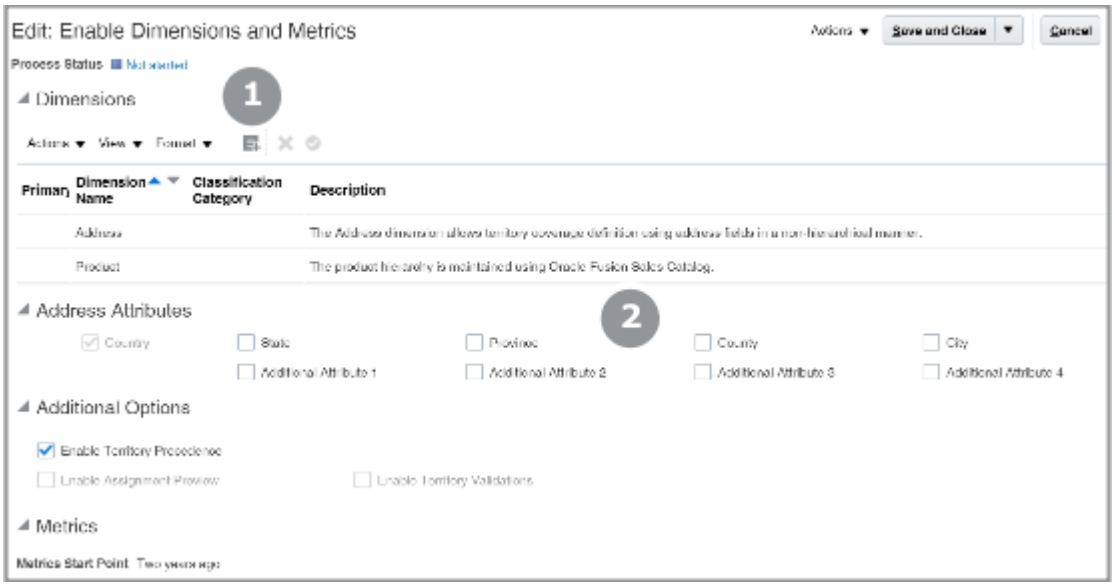
For example, if you want to enable the product dimension, then you must first create the sales catalog and you must run the Refresh Denormalized Product Catalog Table for BI process.

1. Open the task **Enable Dimensions and Metrics** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Territories
    - Task: Enable Dimensions and Metrics
2. On the Enable Dimensions and Metrics page, click **Edit**.
3. In the Dimensions region, click **Select and Add**.

4. Select the dimensions that you want to use and click **OK**.
   Vision Corporation adds **Address** and **Product**.

   > **Note:** If you add the Address dimension, the application displays a warning that you can't use territory metrics. Click **Yes** because you don't need these features.

   Here's a screenshot of the Edit: Enable Dimensions and Metrics page highlighting the location of the **Select and Add** button (callout 1) and the Address Attributes (callout 2) section where you select the address elements you want to use in territory setup.



5. If you added the Address dimension, select the address elements you want to use to set up your territories, such as state, city, or postal code. Our simple Vision Corp. example uses state only.
6. From the Actions menu at the page level, select **Load and Activate**.
   Your selection runs a process that loads the required dimension data. This is a one-time action unless you make changes in the territory dimensions after running the process. If you do make changes later, if you add dimensions or decide to change the industry classification for accounts, for example, then you must load and activate again.

You can select **Refresh Status** from the Actions menu at the page level to monitor the process progress. When the process completes successfully, you can start defining territories in the application.

Create the Sales Territory Hierarchy

Create a Territory Proposal

Here's how to create a territory proposal. A territory proposal is the sandbox where you create the sales territory hierarchy.

1. Navigate to the Territories work area.
2. Click the **Sales Territories Hierarchy** tab (the second tab from the top on the left side).

3. On the Active Territories page, click **Manage Proposals**.
4. In the Manage Territory Proposals page, Current Territory Proposals region, click **Create** (the plus sign icon).
5. In the Create Territory Proposal window, enter a name for the proposal.
6. Leave the **Activation Date** field blank. You want the proposal to be activated immediately after you build your territories.
7. Click **Save and View**.

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

Create the Sales Territory Hierarchy

With your territory proposal open, create the sales territory hierarchy starting with the top territory. For each territory you create, enter the name of the salesperson or manager who owns the territory, and the values for the dimensions that form the territory boundaries.

When you create child territories, the application automatically copies all the dimension values from the parent territories to speed up entry.

Create the Overall Catchall as the Top of the Hierarchy

Here's how to create the territory at the top of the sales territory hierarchy as the overall catchall territory. The top territory is usually owned by a senior manager or executive. Because you don't want executives troubleshooting territory assignment, you must add a second resource to do the troubleshooting.

1. In the Territories region of your territory proposal, click **Create**.
2. On the Create Territory page, enter the territory name, for example, `US Product Sales`.
3. Enter the resource who is the owner of the top territory, most likely the VP of Sales:

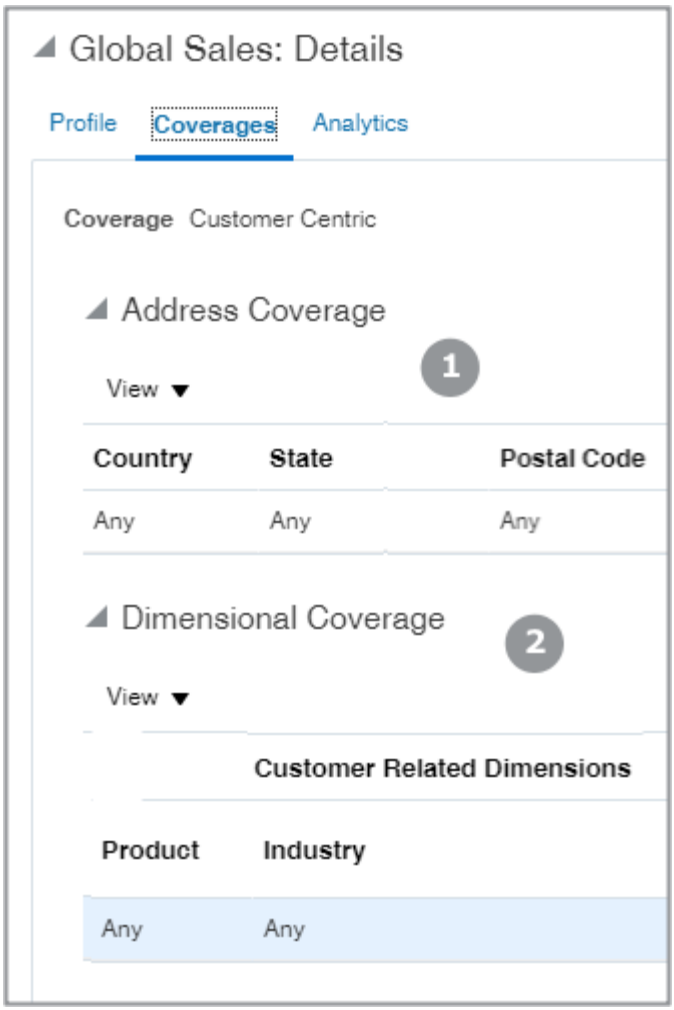
    a. From the **Owner** list, select **Search**.
    b. Search for the resource name using any of the criteria.
    c. Select the name and click **OK**.

    The owner is now listed on the Territory Team tab in the Additional Information section at the bottom of the Create Territory page.
4. From the **Type** list, select **Prime**.
5. From the **Enable Forecasting** list, select **Prime only**. This setting enables the territory to be used for forecasting.
6. Now add the sales administrator or another resource for troubleshooting any accounts and opportunities that get assigned to the catchall territory.

    a. In the Territory Team tab in the Additional Information region, click **Select and Add** (the document icon with a plus sign).
    b. Search for the resource using any of the fields.
    c. Select the resource from the search results and click **OK**.
7. Click **Save and Close**.

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

8. With the territory selected in the Territories table, click the Coverages tab in the Details region at the bottom of the page.



The Address Coverage section (callout 1 in the screenshot) lists the address elements you enabled for territories, all with the value of Any. The Dimensional Coverage section (callout 2), includes all of the other dimensions you are using, also with the value of Any for each. A setting of Any is what you want for your overall catchall territory.

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

You're now ready to add the rest of the territory hierarchy.

Add the Rest of the Hierarchy

With the territory proposal open, add the rest of the sales territory hierarchy from the top down. Here's how to add a territory:

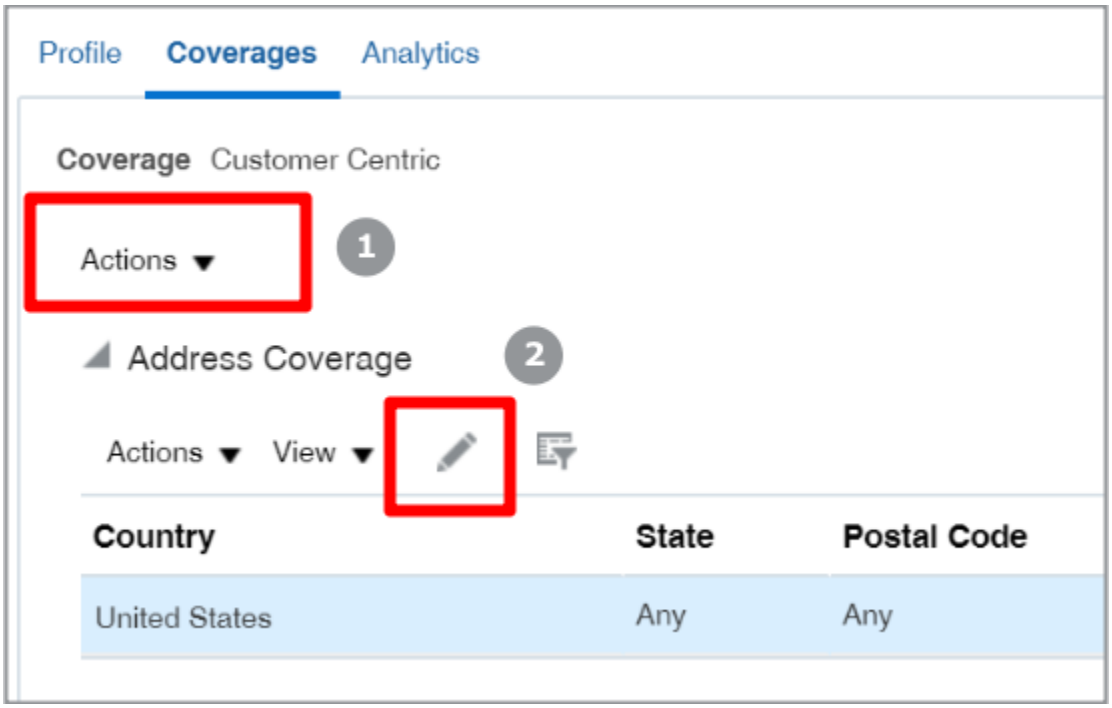
1. Select the parent territory in the Territories table.
2. Click **Create Child of Selected Territory** (the plus sign icon).

3. On the Create Territory page, enter the territory name.
4. Enter the owner for the territory.
5. Select the territory type, either **Prime** or **Overlay** depending on the territory you're creating.
6. From the **Enable Forecasting** list, select **Prime only** for territories involved in forecasts. For overlay territories, select **Disabled**. The setting of Disabled removes the territory from forecasting.
7. Click **Save and Close.**

   You're returned to the Territory Proposal page. You're now ready to enter the values for the different territory dimensions.
8. If you're creating a territory with no coverage, then select the territory in the Territories table and do the following:

   a. In the Coverages tab, select a row showing coverage values.
   b. From the Actions menu, select **Remove all**.

   Here's a screenshot of the Coverages tab. Callout 1 highlights the location of the Actions menu.



   The coverage now shows a **No data to display** message.

9. If you're creating a territory with coverage, then select the territory in the Territories table, and enter the values for the dimensions:

    a. For the address dimension, do the following:

        i. In the Address Coverage section, select any row and click **Edit** (the pencil icon, callout 2 in the screenshot).

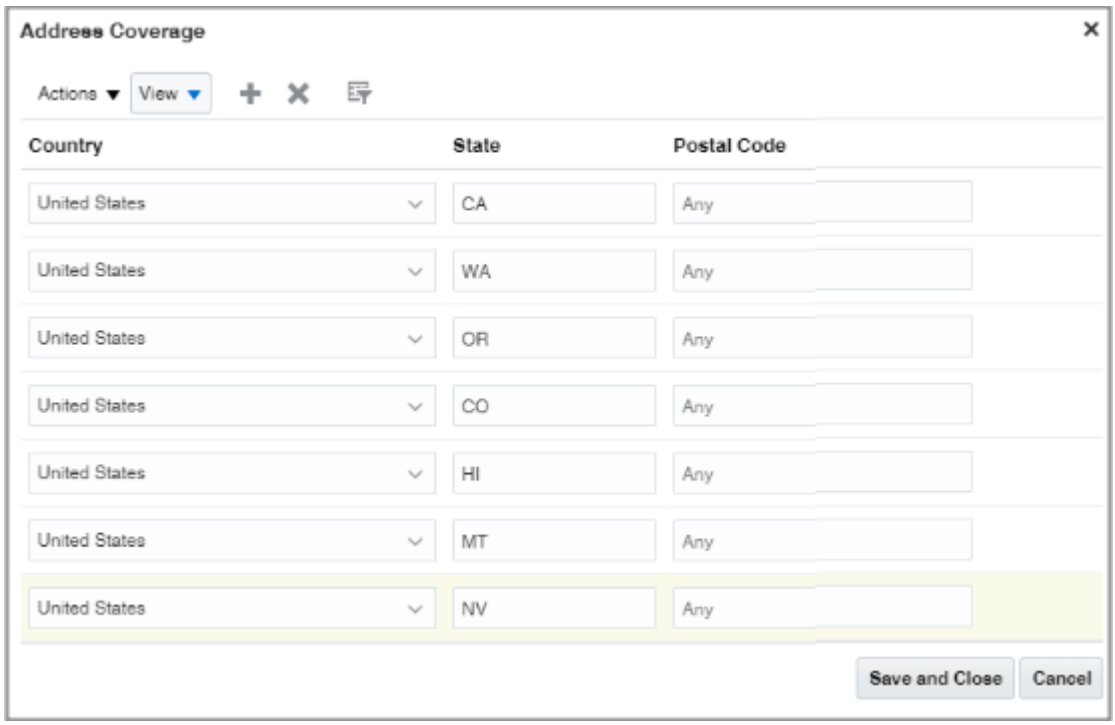
        Your action opens up a separate window to enter all of the address values for the territory.

        ii. In the separate Address Coverage window, click **Add** and enter the values for each address element. Add as many rows as you need to cover all the possible address values in your data:

            - Except for the Postal Code field, the application matches your entries exactly, but the matches are not case-sensitive. If your data includes a variation of spellings, then you must

add rows for them all. For example, if your data includes `CA`, `California`, and `Ca.`, then you must include a row for each spelling variation to assure correct assignment.

Here's a screenshot of the Address Coverage window with a row for each of the different states in a western US territory.



- If you are creating territories using postal codes, such as US ZIP codes, you can enter ranges of values and use the percent sign (%) to indicate partial matches.

b. Here's how to enter values for the other dimensions in the Dimensional Coverage section:

i. In the Dimensional Coverage section, click **Edit**.

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

The Edit Coverage window shows a list of available values in the left Available Dimension Members pane.

iii. Move the values you want to use for the territory to the Selected Dimension Members pane on the right.

> **Tip:** If the Product dimension shows the wrong products, go to the Scheduled Processes work area and run the Refresh Denormalized Product Catalog Table for BI process. The wrong products may show up if you changed the root of your sales catalog.

iv. Click **Save and Close**.

You're returned to the Territory Proposal page.

After you complete adding territories and specifying coverages, you're ready to activate your territory proposal.

Activate the Territory Proposal

You can activate your territory proposal right away after you complete building your territory hierarchy. Just click Activate while still editing the territory proposal. If you didn't, no worries. You can activate the proposal from the Manage Territory Proposals page. Here's how:

1. Navigate to the Territories work area.
2. Click the **Manage Territory Proposals** link.
3. If the proposal you want to activate doesn't appear on the Manage Territory Proposals page, in the Current Territory Proposals table, select **All Proposals** from the **Proposals** list.
4. Select the proposal and click **Activate**.

   The application displays the proposal in the Completed Territory Proposals region. You can refresh the page to display the most recent status and navigate to the Territories page to view the territories after they are active.

Create a Territory with No Coverage

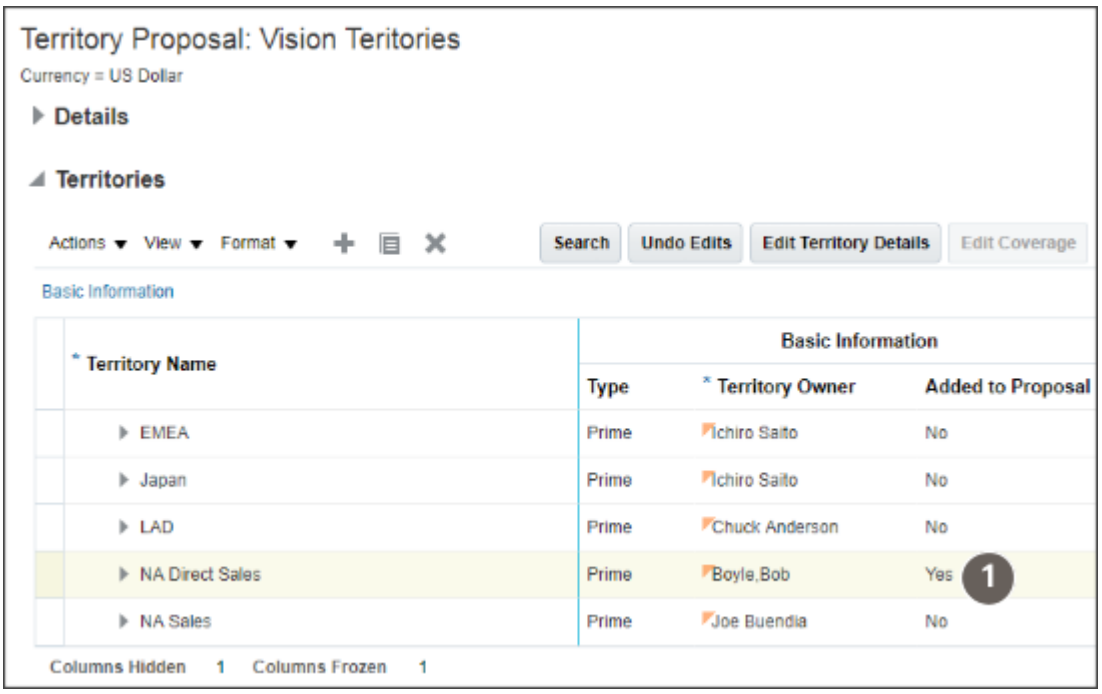
Sometimes you need to create a territory to group other territories for forecasting or you want to forecast accounts that are included in a territory by name. In these cases, you don't want any accounts or opportunities assigned to the territory.

You can create territories that are skipped by the assignment process by deleting the coverage across all territory dimensions. You can only delete coverage while you're in a territory proposal and you must delete coverage across all the dimensions in a territory. You can't delete coverage for individual dimensions.

Here's how to create a territory with no coverage:

1. In the territory proposal, Territories region, select the territory you want to turn into a territory with no coverage. Make sure it's added to the proposal.

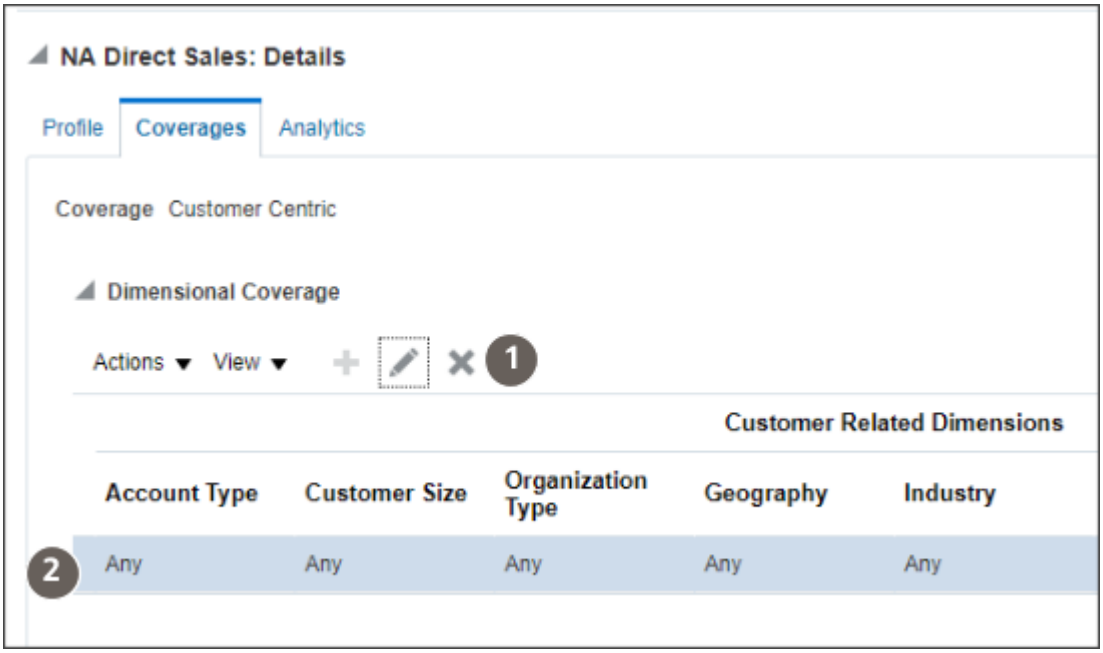
   A Yes in the Added to Proposal column indicates that the territory is in the proposal. Here's a screenshot of the Territories region of a sample territory proposal highlighting the column.



2. In the Details region, select the **Coverages** tab.

3. Select the row showing the coverage values in the Dimensional Coverage region on the tab.

   Here's a screenshot of the Territory Proposal window with the Coverages tab. Callout 2 shows the location of the row of values you delete to create a territory with no coverage. Callout 1 indicates the location of the **Delete** icon.



4. Click **Delete**.

   The application warns you that your action will remove all data in the table.
5. Click **Yes** in the warning.

   The entire row is deleted.
6. Save.

Enable Automatic Assignment of Imported Accounts

Enable automatic sales territory assignment of accounts you import by setting the following system profile options to Yes. Setting the profiles to Yes, runs the Request Account Assignment process after import. By default, you must run the process manually to assign accounts.

System Profile Option Name	Description
Sales Account Automatic Assignment on Import Enabled (ZCA_BATCH_ASSIGN_ON_BULK_IMPORT)	Enable automatic sales territory assignment after you import accounts.
Sales Account Automatic Assignment on Create Enabled (ZCA_SA_AUTO_ASSIGN_ON_CREATE)	Enable automatic sales territory assignment of new accounts after you import accounts.

System Profile Option Name	Description
Sales Account Automatic Assignment on Update Enabled (ZCA_SA_AUTO_ASSIGN_ON_UPDATE)	Enable automatic sales territory assignment whenever accounts are updated when you import.

1. In Setup and Maintenance, go to the **Manage Administrator Profile Values** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. Search for each of the profile options.
3. Set the **Profile Value** to **Yes**.
4. Click **Save and Close**.

Make Opportunity Assignment Automatic

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

1. In Setup and Maintenance, go to the **Manage Opportunity Profile Options** task:
    - Offering: Sales
    - Functional Area: Opportunities
    - Task: Manage Opportunity Profile Options
2. In the Manage Opportunity Profile Options page, search for the profile option by entering `Assignment Submission at Save Enabled` in the **Profile Display Name** field.
3. In the MOO-OPTY_ENABLE_AUTO_ASGN: Profile Values region, select **Yes** from the **Profile Value** list.
4. Click **Save and Close**.

Run Assignment Processes

Run the Account Assignment Process

You must run the Request Account Assignment process to assign territories to accounts each time you activate a territory proposal. You must also schedule this process to run regularly to ensure that all territories are assigned properly.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. On the Overview page, click **Schedule New Process**.
3. In the Schedule New Process window, enter `Request Account Assignment` in the **Name** field and press **Return**.
4. Select the process and click **OK**.
5. On the Process Details page, make these entries to assign all records:

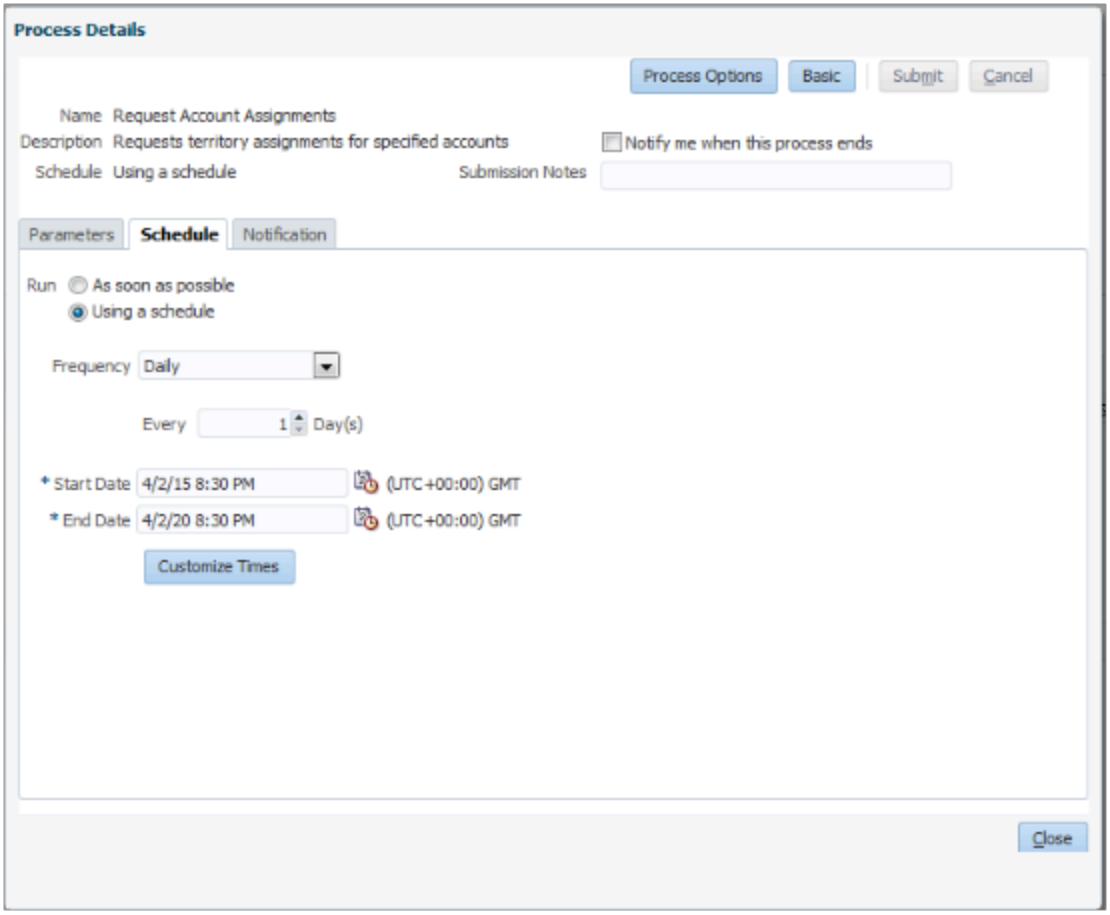
Field	Entry
Work Object	Account
Candidate Object	Account Territory
Assignment Mode	Territory
View Criteria Name	`AllSalesAccountsVC`.

> **Note:** You can run the assignment process on a subset of records by entering different parameters in the **View Criteria Name** and **View Criteria Bind Values** fields.

6. The first time you run the process click **Submit** to run it immediately.

7. You must also set up the process to run regularly, perhaps once a day:
    a. Click **Advanced**.
    b. Click the Schedule tab.
    c. Select the **Using a schedule** option.

    Here's a screenshot of the Process Details page with the Schedule tab and the Using a Schedule option selected.



    d. Select the frequency and start date.
    e. Enter an end date far in the future.
    f. Click **Submit**.
8. Depending on your settings, your process runs immediately or at the intervals you specified. You can monitor its progress by searching for the process by name on the Overview page.

Related Topics

- Schedule Account Assignment

Run the Opportunity Assignment Process

You must run the Revenue Territory Territory Based Assignment process to assign territories to opportunities after you activate a territory proposal. You must also schedule this process to run daily to ensure that all territories are assigned properly.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. In the Scheduled Processes page, click **Schedule New Process**.
3. In the Schedule New Process dialog, **Name** field, click **Search: Name** icon (down arrow) and select the **Search** link at the bottom of the list.
4. In the Search and Select dialog, enter the process name `Revenue Territory`, and click **Search**. You can search by a partial name, but note that the search is case-sensitive.
5. Select the process name in the results and click **OK**.
6. Click **OK** again, if required.
7. Enter these process parameters:

Field	Entry
View Criteria Name	Enter `OpenOpportunitiesByCreationDate`.
View Criteria Bind Values	You can have the option of assigning territories to those open opportunities created since a certain date or those created for a range of dates: o For a specific date, enter `BindOptyCreationDateFrom=YYYY-MM-DD` where YYYY-MM-DD is the date you started implementing the application. For example, `BindOptyCreationDateFrom=2014-01-01` assigns all open opportunities created since January 1, 2014. o To use a date range, enter `BindOptyCreationDateFrom=<date>, BindOptyCreationDateTo=<date>`. Note that the From and To values are separated by a comma.

   Note: You can find information about additional process parameters in the Implementation Reference guide.

8. You must also run this same process periodically to assign new opportunities
   a. Click **Advanced**.
   b. Select the Schedule tab.
   c. Select the **Using a schedule** option.
   d. Select the frequency and start date.
9. Click **Submit**.
10. Unless you specified a schedule, your process runs immediately. You can monitor its progress by searching for the process by name on the Overview page.

Related Topics

- Recommendations for Assignment Processes for Opportunities

20 Leads

How to Handle Leads from External Sources

The leads you get from the web, from trade shows, from marketing campaigns, or from lists you purchased aren't always of the highest quality. You want to contact the potential customer and verify the information before creating new account and contact records in your application. And you don't want to pass worthless leads to your highly paid and busy field sales.

This chapter outlines how you can set up a process for creating, verifying, and qualifying these kinds of net new leads. We are calling these leads "net new" leads because the account and contact information stays in the lead until the lead is qualified and converted. Our use case follows the common practice of using inside sales to do the initial lead qualification. But there's nothing stopping you from modifying the use case to suit your needs.

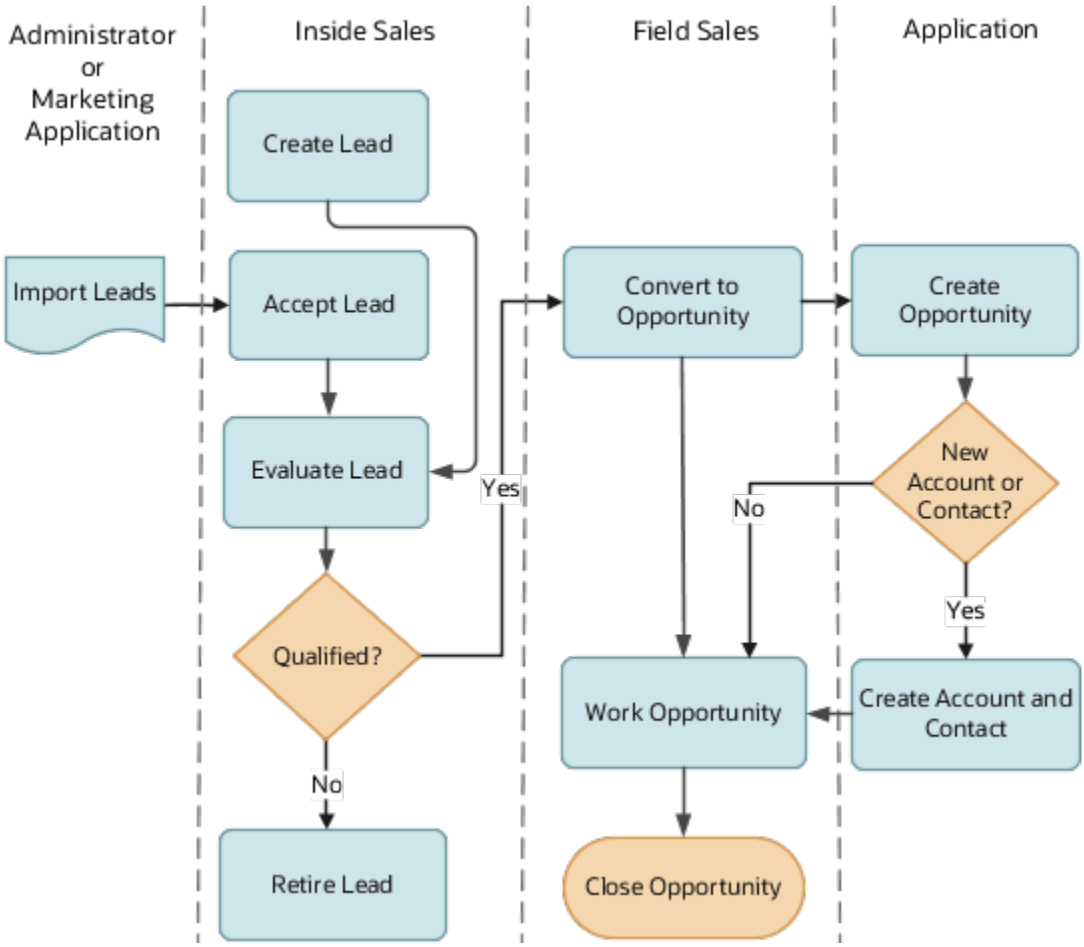
Use Case Overview

The fictitious company, Vision Corp., uses a team of inside sales representatives to verify the information in leads. All qualified leads are automatically assigned to field sales representatives for further assessment and conversion into opportunities. Here's an overview of the process:

1. Net new leads can get created in one of three ways:
    - The leads are imported, perhaps by a sales administrator using the import macro you download from My Oracle Support.
    - The leads get created from an integration with a marketing application, such as Oracle Eloqua.
    - A salesperson can also create net new leads manually in the UI.
2. Using an assignment rule you create, the application automatically assigns all inside sales representatives to the sales team on each of the imported leads. Being on the sales team, makes it possible for the inside sales representatives to view and update the leads, but it doesn't assign them ownership of the leads. Salespeople become owners of a lead only when they accept a lead.
3. Individual inside sales representatives review the list of leads and accept the leads they want to work on. Accepting a lead lists you as the lead's owner.
4. The inside sales representatives verify the information in each lead. They check for potential duplicates, contact the customer, and answer a standard list of questions in a qualification template that you set up for them.
5. When leads meet the qualification criteria, the inside sales representatives set the leads to the qualified status.
6. If the leads don't meet the criteria, the inside sales representatives retire them instead.
7. The application automatically assigns the qualified lead to sales territories in the field sales organization.
8. Field sales representatives review the individual leads assigned to them, and convert the promising ones to opportunities.

   The representative doing the conversion becomes the owner of the new opportunity.
9. During the conversion process, the application creates new account and contact records of type prospect. The lead is automatically set to a converted status and linked to the account and opportunity records.

Here's a diagram that illustrates the processes:



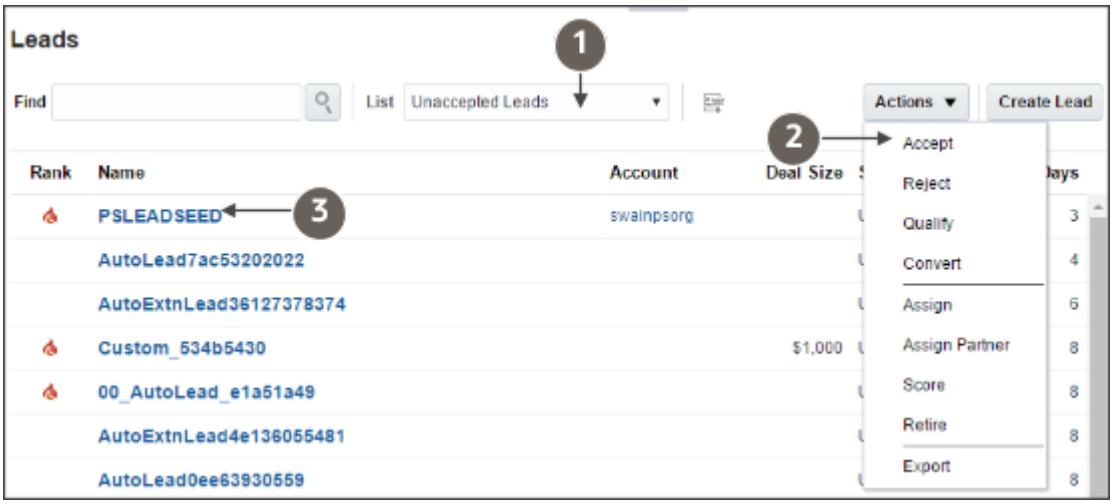
How Inside Sales Works Sales Leads

Here's how salespeople work leads in the CX Sales UI. Because of the changed UI, the process in the Digital Sales UI is a bit different. For information about working with Leads in Digital Sales, see the Leads chapter in the *Using Digital Sales (Next Gen Sales)* guide.

1. To find the imported leads to work on, the inside sales representatives select the **Unaccepted Leads** list (callout 1 in the screenshot).

   You create the saved search for this list during setup.

2. Representatives accept ownership of the leads that they want to work on, either by:
    - Selecting the **Accept** from the **Actions** list (callout 2).
    - Or by drilling down on the lead name (callout 3) and clicking the **Accept** button in the Edit Lead page.

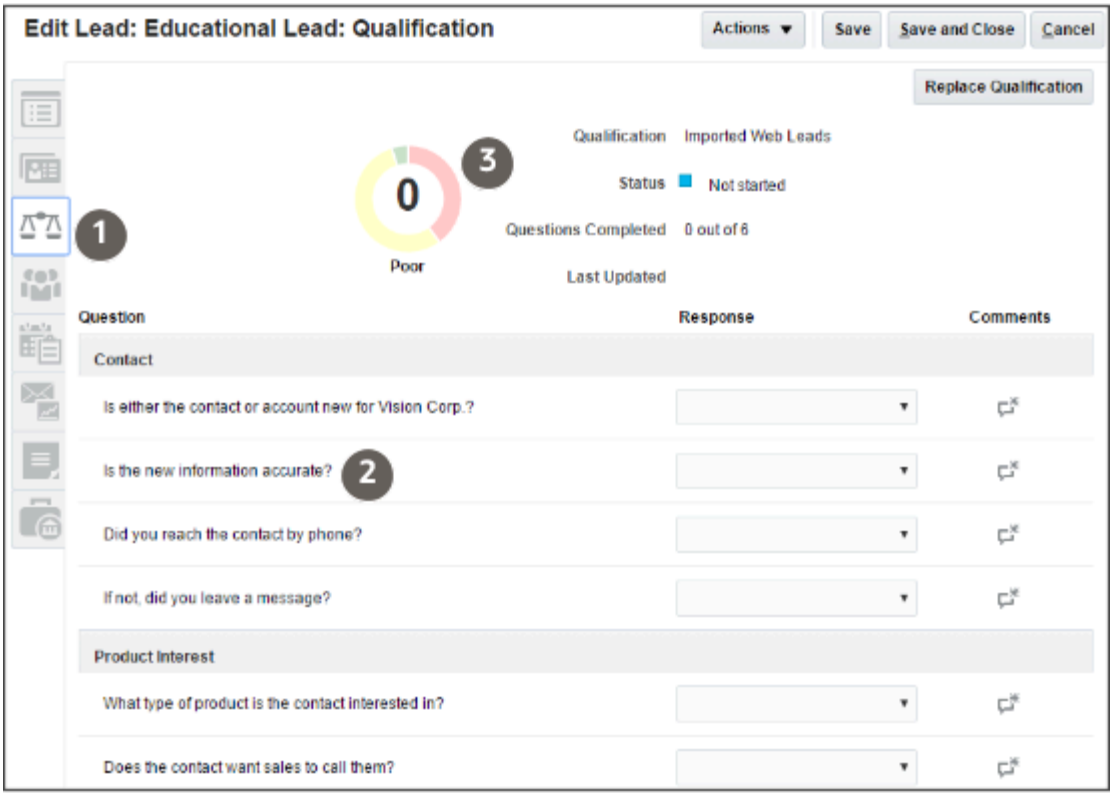


   By accepting the lead, a representative becomes the lead owner and can now see the lead listed in the **My Open Leads** list.
3. Inside sales representatives check if the account and contact information in the lead duplicates information already in the sales application. In our use case, the representatives check for duplicates manually in the leads UI by selecting the **Check for Duplicates** action.
4. The representatives contact the customer and qualify the leads, guided by the questions you set up as part of a qualification template. Using the qualification template, while not mandatory, ensures that everyone follows the same procedure for qualifying leads.

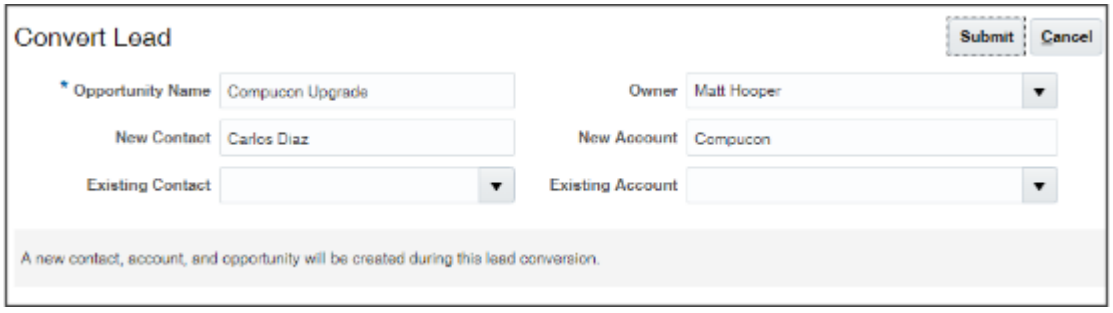
   > **Note:** Qualification templates are replaced by Orchestration processes in Digital Sales.

   Here's a screenshot of a sample qualification template in the CX Sales UI. Salespeople access the template on the Qualification tab (callout 1) of the Edit Lead page. They answer the questions that you provide (callout 2). These questions are organized in question groups, which serve as headings on the page. As they answer the

questions, salespeople get visual feedback on the quality of the lead (callout 3). You select the ratings and color schemes during qualification template setup.



5. When inside sales representatives set the lead status to **Qualified**, an assignment process assigns the lead to the appropriate sales territory. The process also adds the appropriate field sales representatives to the sales team.
6. The field sales representatives convert the lead to an opportunity by selecting the **Convert** from the **Actions** menu after viewing the lead.
7. You can rename the opportunity and change ownership in the Convert Lead window (shown in the screenshot).



How You Import Leads Depends on the Lead Type

How you import leads depends on whether you're importing the net new leads described in this chapter or leads linked to existing accounts and contacts. Here are the main differences:

- Net new leads

  You import the account and contact as part of the lead business object. Account and contact records are created only when the sales representatives convert the leads to opportunities. You can use the Excel macro provided by Oracle to import these types of leads.
- Leads linked to existing accounts and contacts

  You must use IDs to reference the existing accounts and contact record in your import file. You can use the IDs you generated in your account and contact import files or you can export IDs from your application. You cannot use the leads import Excel macro for this type of import.

This chapter discusses only the import of net new leads using the import macro. See the *Understanding Import and Export Management for CX Sales and Fusion Service* guide to understand how to import the other types of leads.

Overview of Leads Setup

Here are the setup steps required to set up the sample leads use case covered in this chapter.

Step	Applies To	Description	Task	Where to Get More Details
1	CX Sales	To permit salespeople to enter account and contact information as text in net new leads in CX Sales, you must expose two fields, New Account and New Contact, on the appropriate lead pages. In Digital Sales, salespeople can enter information as text or select existing accounts and contacts in the same field. No UI change is required.	Application Composer	See the topics: • *Make Changes to the Lead Pages* • *Add the New Account and New Contact Fields to the UI*
2	Both CX and Digital Sales	Create the assignment rule to assign the leads to the inside sales representatives who will qualify them.	Manage Sales Lead Assignment Rules	See the topic: *Set Up the Assignment Rule for Assigning Leads*
3	Both CX and Digital Sales	Set two system profile options to enable lead assignment. Setting Lead Assignment Mode to Both turns on both rule-based and territory-based	Manage Sales Lead Profile Options	See the topic: *Enable Lead Assignment*

Step	Applies To	Description	Task	Where to Get More Details
		assignment. Setting the Assignment Rule for Rule Based Lead Assignment profile option tells the application which rule category to use.		
4	Both CX and Digital Sales	Before importing your leads, you can optionally change the values provided by Oracle for lead rank and the lead source channel. Salespeople can use lead rank, for example, hot or cold, to prioritize leads to work on next. The lead source channel indicates if the lead came from the web, an email, and so on.	Manage Set Enabled Lookups	See the topic: *Change the Values for Lead Rank and Lead Channel*
5	Both CX and Digital Sales	Import leads using the lead import macro. You can import up to 5,000 leads at a time.	None. You import from the Excel macro itself.	See the topic: *Import Leads Using the Import Macro*
6	Both CX and Digital Sales	Run the lead assignment process twice: the first time to assign the imported leads to inside sales and the second time to assign qualified leads to field sales. You can also schedule assignment process to run at regular intervals.	Manage Lead Processing Activities	See the topic: *Run the Lead Assignment Process*
7	Digital Sales only	Create a list that inside sales representatives use to view the imported leads that are available for them to work on.	None	See the topic: *Display List of Unaccepted Leads*
8	Both CX Sales and Digital Sales	Sign in as one of the inside sales representatives and one of the field sales representatives to test your setup.	None	See the topic: *Verify Your Leads Setup*
9	Both CX Sales and Digital Sales	Schedule the process Update Leads with Most Recent Contact and Account Information to run periodically in order to make sure any changes to account and contact information are reflected in leads.	**Navigator** > **Tools** > **Scheduled Processes**	See the topic: *Update Leads with Most Recent Contact and Account Information*

Step	Applies To	Description	Task	Where to Get More Details
10	CX Sales only	Create a list that inside sales representatives use to view the imported leads that are available for them to work on.	None	See the topic: *Display List of Unaccepted Leads*
11	CX Sales only	Specify which qualification template you want to appear in a lead by default by setting the system profile option Advanced Lead Qualification Enabled. You can specify one template as the default for all leads, or have different defaults for different users and products.	Manage Sales Lead Administrator Profile Values	See the topic: *Select Default Lead Qualification Templates*

Set Up the Assignment Rule for Assigning Leads

You can use assignment rules to automatically assign your leads to sales resources or to sales territories. In this example, you set up a rule that assigns imported leads to sales resources, the inside sales representatives.

Creating an assignment rule involves the following three major steps:

1. Create a rule set.
2. Create the rule.
3. Publish the rule set.

Create the Rule Set

You must create a rule set before you create your rule. The rule set makes it possible for you to have more than one rule for your lead assignment.

1. Open the **Manage Sales Lead Assignment Rules** task from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Leads
    - Show: All Tasks
    - Task: Manage Sales Lead Assignment Rules
2. Select the **Sales Lead Resource Rule Category** from the **Category** list. You're assigning resources to the leads.

3. Create a rule set:
    a. Click **Add Row** (plus sign icon) in the Rule Sets region toolbar.
    b. Enter a rule set name in the Name field and an optional description.
    c. Make sure that **All** is selected as the **Filter**.

       The **All** setting ensures that all the inside sales representatives are assigned to all of the lead sales teams so each sales representative can work any of the leads you import.

       If you selected **Random** as your filter value, then the inside sales representatives are assigned to the lead teams at random. Each representative would be assigned approximately to the same number of leads, but the representatives could not view and work on the leads assigned to the others.
    d. Save.

Create the Rule

Now create the rule to assign the inside sales representatives to all imported leads that are unqualified.

1. With the rule set you just created selected, click **Create** (the plus sign icon) in the Rules region.

   The Create Rule page appears.
2. Enter a rule name and an optional description.
3. In the Conditions region, make sure the **All conditions met** operator is selected for the **Rule Applies If** field.
4. Click **Add Row** (the plus sign icon).
5. Now enter the first of the two conditions. This first condition ensures that the rule only assigns imported leads.

Field	Selection
Object	Sales Lead
Attribute	Import Activity Identifier
Operator	Is not blank

6. Click **Add Row** again and enter the second condition. This condition assures that the rule assigns only unqualified leads.

Field	Selection
Object	Sales Lead
Attribute	Status
Operator	Equals
Value	Unqualified

Field	Selection

7. In the Action region, enter the names of the inside sales representatives who work the imported leads:
    a. Click **Select and Add** (plus sign icon).
    b. Search by name in the Select and Add window.
    c. Select the name.
    d. Click **OK**.

    Clicking **Apply** instead keeps the window open so you can add additional resources.
8. Click **Save and Close**.

    You're returned to the Manage Sales Lead Assignment Rules page.

Publish the Rule Set

For the rule to become active, you must publish the rule set after each change by clicking **Save and Publish** on the Manage Sales Lead Assignment Rules page. The application lists the day and time when the rule was last published.

Enable Lead Assignment

Enable lead assignment using both rules and sales territories by setting these two system profile options. Territory assignment assigns sales territories to the lead, not individual resources. Resources are added to the lead only by resource assignment rules.

System Profile Option Display Name	Value to Enter	Description
Lead Assignment Mode	Both	Specifies if you're using rules, sales territories, or both for assigning leads. Vision Corp. is using both.
Assignment Rule for Rule-Based Lead Assignment	Sales Lead Resource Rule Category	Specifies the rule category for the rule used for lead assignment.

Here's how to set the profiles:

1. Open the task **Manage Sales Lead Profile Options** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Sales Lead Profile Options
2. Enter the profile option name in the **Profile Display Name** field.
3. Click **Search**.

    The application displays the profile option information.

4. For the Assignment Rule for Rule-Based Lead Assignment profile, click **Add** (the plus sign icon) in the Profile Values region and select **Site** as the **Profile Level**. For the Lead Assignment Mode system profile option, Site is already entered for you.
5. In the Profile Values region, select the value from the **Profile Value** list.
6. Click **Save** or **Save and Close**.

Change the Values for Lead Rank and Lead Channel

Optionally, you can change the values for lead rank and lead channel by editing their lookup types. Salespeople use lead ranks to prioritize leads to work on. The lead channel records the source of the lead.

The lookup type Lead Rank (MKL_LEAD_RANK_SETID) includes these predefined values:

- Cold
- Hot
- Warm

The lookup type Lead Channel (MKL_LEAD_CHANNEL_SETID) includes these predefined values:

- Direct Mail
- E-Mail
- Fax
- Model-based prediction
- Phone
- Rules-based prediction
- Sales visit
- Web
- Wireless Message

Here's how to change the existing values and to add new ones:

1. Open the task **Manage Set Enabled Lookups** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Leads
    - Show: All Tasks
    - Task: Manage Set Enabled Lookups
2. On the Manage Set Enabled Lookups page, search for either of the lookup type names by entering `Lead Channel` or `Lead Rank` in the **Meaning** field.

    The lookup type and the available values, called lookup codes, appear below.
3. Here's how to change a lookup codes:
    - For the existing values, you can change the wording displayed to the user by modifying the meaning or you can end date values you do not need.
    - You can add new values, by clicking **New** (the plus sign icon).
4. Click **Save and Close** when you are done.

5. If you made changes, you must remember to enter the changes on the **Lead Channel** and **Lead Rank** worksheets in the lead import macro.

Import Leads Using the Import Macro

Here's how to enter your lead data into the macro and import. You can import up to 5,000 lead records at a time. If you import multiple batches, you must ensure that each import completes before you start another. You can use the macro only to import net new leads. You can't use it to import leads for existing customers or prospects.

Note: You can add 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.

1. Open the Lead Import Macro.
2. Make sure that macros are enabled in Excel.
3. If you're importing additional fields, including custom fields, then do the following:
    a. Click the **Attributes Mapping** worksheet.
    b. Click **Fetch Attributes from Server**.
    c. In an empty row in the worksheet, select the attribute from the **Attribute Name** column.
    d. Enter the name you want displayed as the column heading in the Lead worksheet. This name displays only in the macro.
    e. Click **Update Headers** to add the column to the Lead worksheet.
4. If you changed the lead rank or the lead channel lookup types, then enter the new values in the **Lead Rank** and the **Lead Channel** worksheets.
5. In the Template worksheet, enter your lead data. The import requires you to enter three pieces of information for each lead:
    - Lead name
    - Account name
    - Contact full name

    The macro generates the required lead number after you click **Create Import Activity**.

    You must also include contact information for your inside sales representatives to be able to qualify the lead. If you're assigning qualified leads using the state where the business is located, you must include the state in your import or have the inside sales representatives enter it as they qualify the lead.

    Here's what to enter in the macro:

Column	What to Enter
Lead Number	Leave this required column blank. The macro generates the lead number automatically using the date and time. The application uses the lead number to identify the lead record for updates.
Lead Name	The lead name identifies the lead in the lists salespeople see in the Leads work area. In the UI, the application automatically enters a lead name as a combination of the contact name and

Column	What to Enter
	the date and time. You may want to follow the same practice in your import. Entry in this field is required.
Account Name	Organization name. Entry is required.
Contact Full Name	You must enter the contact's first and last names separated by a space.
Job Title	Job title.
E-mail	Contact email address.
Phone Country Code	Contact phone country code.
Phone Area Code	Contact phone area code.
Phone Number	Contact phone number with no spaces or delimiters.
Address 1	Contact address line 1. If you convert the lead to an opportunity, then the application uses the address entered in the contact address fields both as the contact address and the account address.
Address 2	Contact address line 2.
City	Contact address city.
State	For US states, enter the two-letter state code.
Province	This column (O) is hidden in the macro.
ZIP Code	Postal code.
Country	The ISO two-letter code for the country.
Product Group	Enter the Product Group Reference Number. You can copy this number from the macro you used to import product groups.

Column	What to Enter
Product	Product name you imported earlier using the product import macro. If you're importing a product interest for a lead, you can't import a product group at the same time.
Lead Rank	You must use one of the standard values provided by Oracle in the macro, unless you changed them. The standard values are: - COOL - HOT - WARM
Lead Channel	You must use one of the standard values provided by Oracle in the macro, unless you changed them. The standard values are: - DIRECT_MAIL - EMAIL - FAX - PHONE - SALES_VISIT - WEB - WIRELESS_MESSAGE - ZSP_MODEL_PREDICTION - ZSP_RULES_PREDICTION

6. In the lead import macro, click **Create Import Activity**.
7. If you're prompted to correct errors in your entries, do the following:
    a. Click **OK**.
    b. Click each error link in column D and make the correction on the Template 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.
8. On the Login page, enter the following:
    - Host information for your environment.

      The host name is the portion of the URL between the `https://` and `/sales`. You must be signed in and navigate to one of the sales work areas to ensure that the host name is correct. The name on the sign-in page and on setup pages is different.
    - Your user name
    - Your password

9. Click **Submit**.

   The application displays one of these messages:

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.
`Unable to submit the file import activity. Check log for details.`	You most likely entered the wrong mapping number or the user does not have the correct permissions. Open the Errors work sheet to view the error details.

10. If your import activity was submitted successfully, then click **Activity Details**.

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

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is `Completed`.

11. Optionally, click **Generate Log** to save a file listing the leads that were imported.

Run the Lead Assignment Process

Here's how you assign leads using the rules you set up. For implementations similar to the Vision Corp. use case, you may need to run the assignment process multiple times. Vision Corp. runs it the first time to assign the imported leads to the inside sales representatives for lead qualification. The second time, the process assigns the qualified leads to field sales for conversion to opportunities. Assignment is not automatic, so you must run the process at regular intervals, perhaps once every hour.

1. Open the task **Manage Lead Processing Activities** from the Setup and Maintenance work area:
   - Offering: Sales
   - Functional Area: Leads
   - Task: Manage Lead Processing Activities
2. On the Lead Processing Activities page, click **Create Lead Processing Activity**.
3. To assign the leads you imported to inside sales for qualification, enter these parameters:

UI Region	Field	Entry
Activity Details	Process Type	Assignment

UI Region	Field	Entry
Lead Selection	Status	Unqualified
Lead Selection	Assignment Status	Unassigned
Schedule	Schedule Mode	Immediate

4. Click **Submit**.
5. Now create and submit a second activity to assign the leads to field sales after the leads are qualified. Enter these parameters:

UI Region	Field	Entry
Activity Details	Process Type	Assignment
Lead Selection	Status	Qualified
Schedule	Schedule Mode	Assignment is not automatic. You must run this activity on a repeating schedule to make sure that the leads are transferred to field sales as soon as they are qualified by inside sales. To run the activity regularly, select **Repeats**, enter a frequency (1 hour, for example), a start date, and an end date far into the future. You must enter both a start date and an end date for the process to run.

6. You can monitor the processes on the Manage Lead Processing Activities page. This page lists all of your processing activities.

Display List of Unaccepted Leads

Use these steps to create a saved search list of the leads you imported in the Leads work area. Inside sales representatives use the list to review incoming leads and accept the leads they want to work on. After sales representatives accept a lead, the lead displays among the leads they own and no longer appears on the list.

Saved searches store all of your search criteria, filters, and formatting of results for reuse. Use saved searches to create lists of information useful to you in each work area. For example, you can create a saved search for the leads you imported in the Leads work area. Inside sales representatives use the list to review incoming leads and accept the leads

they want to work on. After sales representatives accept a lead, the lead displays among the leads they own and no longer appears on the list.

Your saved search saves whatever you added to your search, including keywords, filters, columns, and sort order of the results. You can create lists for the whole organization or lists targeted to specific job roles. Here's an overview of the steps:

1. Navigate to the Leads work area.
2. Click in the **Action Bar** and select Manage Saved Searches.
3. Click Actions (the three dots in the Actions column) and select Edit.
4. Modify the list to create a saved search for the leads you imported.
5. Click Save.

Verify Your Leads Setup

Test your leads setup. Sign in first as an inside sales representative to accept and qualify the lead. Then sign in as a field sales representative to convert the lead to an opportunity.

Sign In as an Inside Sales Representative

1. Sign in as one of the inside sales representatives and navigate to the Leads work area.
2. Select the list of unaccepted leads you created.
   The list should contain all your imported leads.
3. Open one of the leads and click **Accept**.
   You should now be listed as the lead owner.
4. Click the **Sales Team** tab to make sure all the appropriate sales representatives are listed.
5. Make sure that the information in the lead you're qualifying is sufficient to assign the lead to the field service representative you're using for testing.
   In our use case, qualified leads are assigned to sales territories by state. Make sure that the contact address in the lead includes one of the states in the US that belong to the territory of the field sales representative you're using for testing.
6. Click **Qualify** to indicate the lead is qualified.

Sign In as a Field Sales Representative

1. Ensure that the assignment process you scheduled previously has successfully completed. If you have not run the assignment process, then you must run the process again, this time, immediately.
2. Sign in as the field sales representative who owns the territory the qualified lead is assigned to.
3. Navigate to the Leads work area.
4. Select the **Open leads where I am on the team** list.
5. Edit the lead.
6. From the **Actions** menu, select **Convert**.
   The Convert window appears.
7. Optionally, change the opportunity name to something more meaningful.
8. Click **Submit**.

9. The opportunity work area view automatically opens in the current tab replacing the leads work area.
10. You can open the opportunity and view the created account and contact from there.

Update Leads with Most Recent Contact and Account Information

Schedule the process Update Leads with Most Recent Contact and Account Information to run periodically in order to make sure any changes to account and contact information are reflected in leads.

1. Open **Navigator** > **Tools** > **Scheduled Processes** .
2. On the Overview page, click **Schedule New Process** and click the **Search Name** button (down arrow) on the right side of the **Name** field.
3. Click the **Search** link at the bottom of the list.
4. In the dialog box, search for **Update Leads with Most Recent Contact and Account Information**.
5. Select the process and click **OK**
6. In the Process Details window, click **Advanced**.
7. Under Advanced Options, select **Schedule**.
8. Select **Using a schedule** and enter information about how often you want to update the lead information.

Related Topics

- What are scheduled processes?

CX Sales Only

Create a Lead Qualification Template

You can use a lead qualification template to set up questionnaires that guide salespeople through the lead qualification process. You can set up multiple qualification templates, each for a different product.

1. Open the task **Manage Sales Lead Qualification Template** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Leads
    - Task: Manage Sales Lead Qualification Template
2. Click **Create** (the plus sign icon) to create a new template, or you can copy and modify the template provided by Oracle.

Enter Basic Template Details

Make these entries in the Enter Details page:

1. Enter a template name. For example: `Imported Web Leads.`
2. Select **Lead** as the **Template Type**.
3. For the **Template Set**, select **Common Set**.

Sets make it possible for you to target different qualification templates for different business units, but the application covered in this guide uses only one business unit. For an explanation of how you can tailor your sales application for multiple business units, see the Implementation Reference guide.

4. Click **Next**.

Configure Ratings

Ratings group question responses in a template into different categories. There are three predefined ratings: Poor, Average, and Good. You can add your own ratings or modify the predefined ratings. When you're done, click **Next**.

Create Question Groups, Questions, and Responses

Create the question groups, which serve as headings in the template, and the questions within each group.

1. Click **Create** (the plus icon) and select **Create Question Group**.
2. Enter a name, which appears as the heading for this group of questions, and click **Save and Close**.
3. Now create your questions for this group. For each question:
    a. Click **Create** (the plus icon) and select **Create Question**.
    b. In the Create Question window, enter the question text.
    c. Enter a weight indicating how important this question is in the qualification process. You have a chance to revisit and adjust the weights to all the questions at a later stage.
    d. Click **Save and Close**.
4. Enter the possible responses for each question:
    a. Enter the response, score and rating.

    Here are the response entries for a yes or no question, for example: `Did you reach the contact by phone?`

Response	Score	Rating
Yes	100	Excellent
No	0	Poor

    b. When you complete entering your questions, you can reorder the questions by clicking **Move** (the double right arrow).
5. Click **Next**.

Edit Question Weights, Configure Score Ranges, and Associate Task Templates

Use these steps to edit the question weights, configure score ranges, and associate task templates:

1. On the Edit Question Weights page, the weights in the **Weights** column for each question until the total equals 100.
2. Click **Save** and then **Next**.
3. The application derives the score range for ratings using the scoring to response mapping in the questions and responses that you entered earlier. On the Configure Score Range Attributes page, you can select the **Override Score Ranges** option to edit the automatically derived score ranges. You can also set different start and end scores for the ratings. You can use the **Graph Color** list to change the colors shown in the various score ranges.

Deploy the Qualification Template

When you're ready to deploy the qualification template, do the following:

1. Click **Save**.
2. Click **Deploy**.
3. Click **OK** to close the confirmation window.

   The application displays any errors in setup. For example, if you did not enter question weights which total 100.

   > **Note:** After you deploy a template, you can't change its name or edit many other aspects. If you need to make changes, make changes in a copy, and then deploy the copy.

Select Default Lead Qualification Templates

To turn on lead qualification, you set the profile option Advanced Lead Qualification Enabled to the lead templates you want to use by default. You can specify one template for use for the whole sales organization, you can specify different templates for different products, and you can assign specific templates to different users. The settings are not mutually exclusive. You can provide a default template for the whole organization, but target different template to individual users or product groups, for example.

1. Open the task **Manage Sales Lead Profile Options** from the Setup and Maintenance work area:
   - Offering: Sales
   - Functional Area: Leads
   - Task: Manage Sales Lead Profile Options
2. Enter `Advanced Lead Qualification Enabled` in the **Profile Display Name** field.
3. Click **Search**.
4. Select the profile option.
5. In the Profile Values section, click **New** (the plus sign).
6. If you're using only one template, then select **Site** from the **Profile Level** list. The options are:
   - **Site**

     The same template is used for the entire organization unless you specify additional templates for product and user.
   - **Product**

     The template is used for a product group. All other product groups are assigned the template you specify at the site level.
   - **User**

     The template is used for the user you enter. All other users are assigned templates for the product or the site.

   Select the name of the template from the **Profile Value** list.
7. Repeat the previous steps for additional products and users.
8. Click **Save and Close**.

Configure the CX Sales Leads UI

Make Changes to the Lead Pages

If your sales organization handles large volumes of unqualified leads using the CX Sales UI and you want to prevent your sales data from getting cluttered with unverified account and contact information, read on.

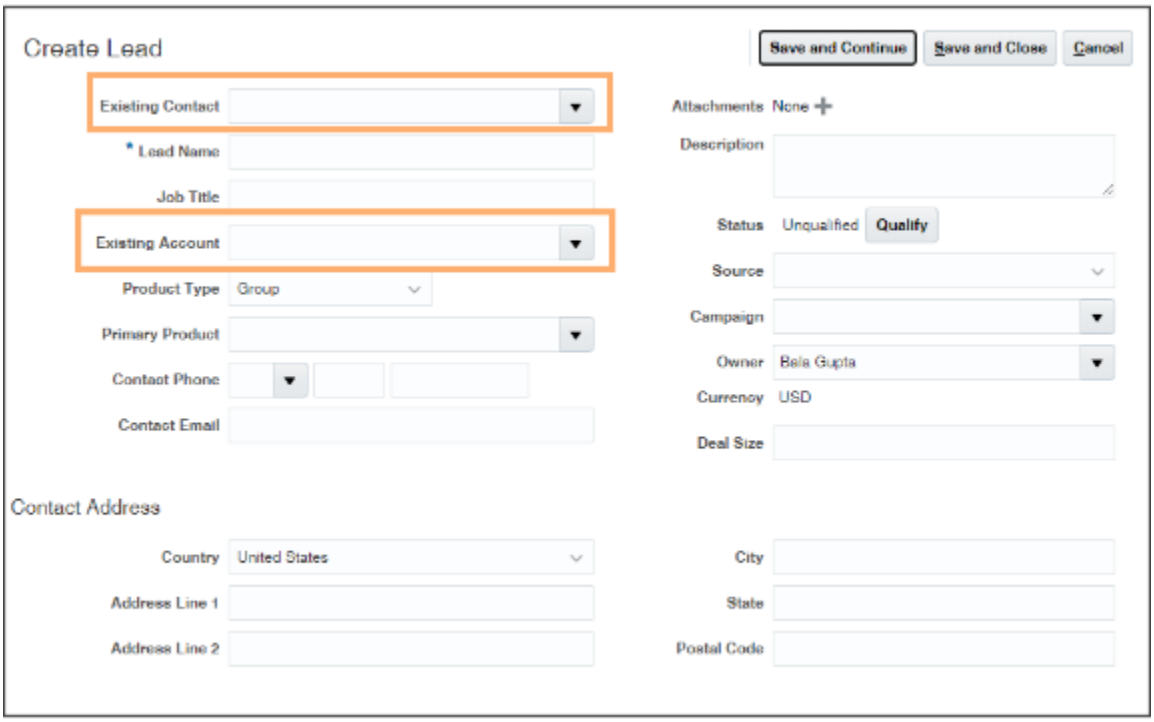
With a bit of setup, you can store account and contact names in the lead as text and create the account and contact records only after salespeople verify that the information is legitimate and accurate. If a lead doesn't pan out, the information just stays in the lead.

Lead Pages Handle Only Leads for Existing Accounts

Here's how the application act by default:

- When creating a lead in the CX Sales UI, salespeople can only enter accounts and contacts that already exist in the application. If they want to create leads for completely new accounts and contacts, they must first create the appropriate account and contact records.
- If you import completely new leads, as you do using the import macro, the leads get imported, but the new accounts and new contacts names don't show up on the Edit page.

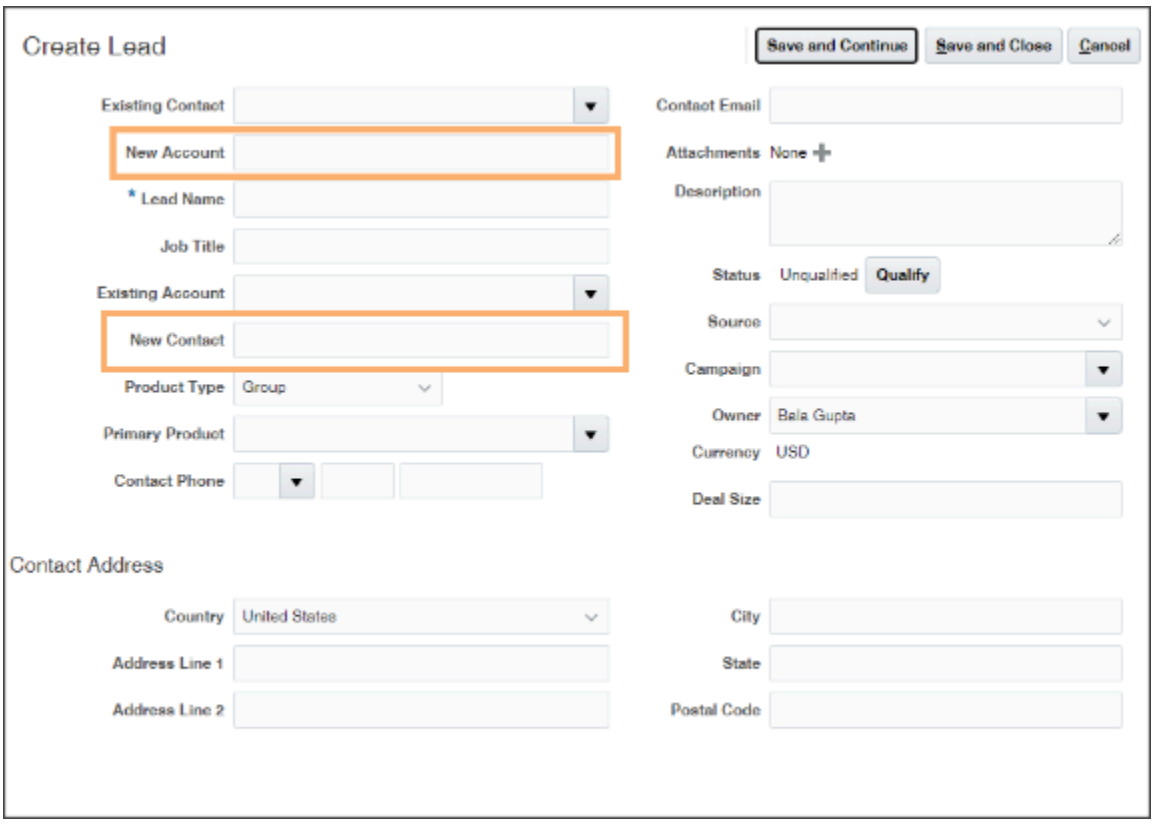
Here's what the default Create Lead page looks like from the CX Sales UI. The screenshot highlights the **Existing Contact** and **Existing Account** fields.



Two Fields Enable Net New Leads in CX Sales

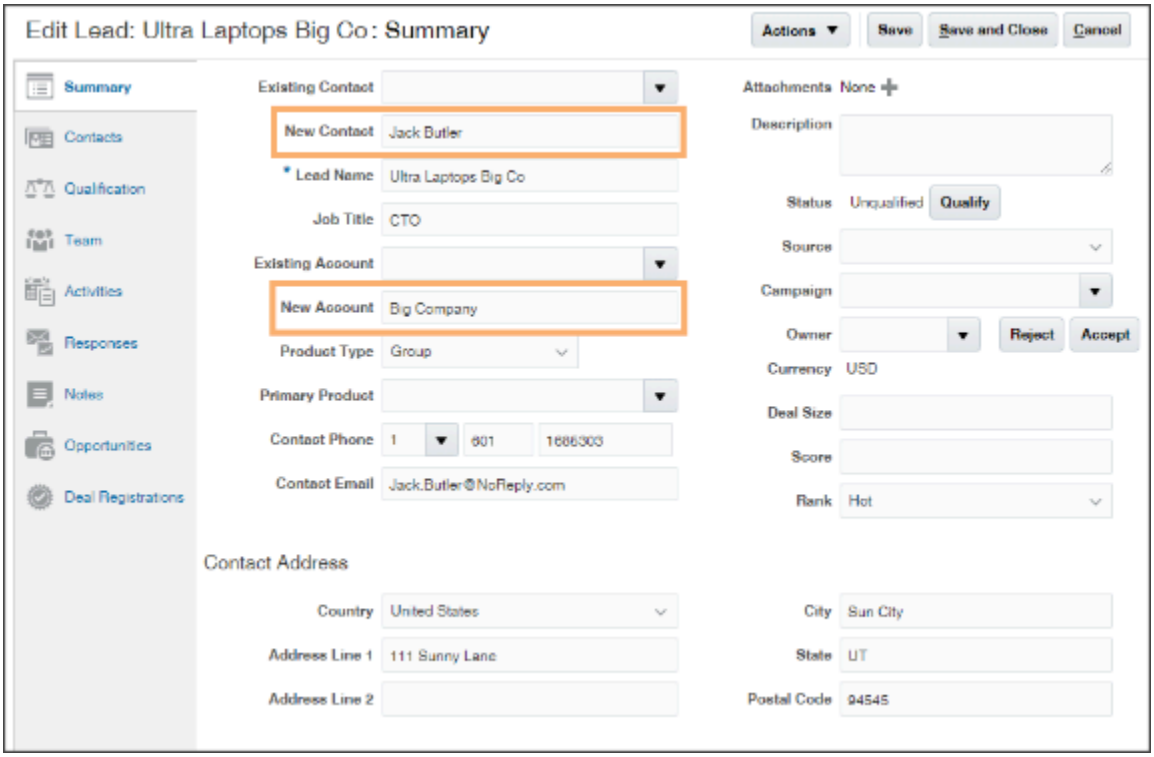
You enable salespeople to view and enter the account and contact names as text in net new leads by exposing the **New Account** and **New Contact** fields in the CX Sales UI.

Here's a screenshot of the Create Lead page highlighting the fields in the CX Sales UI.

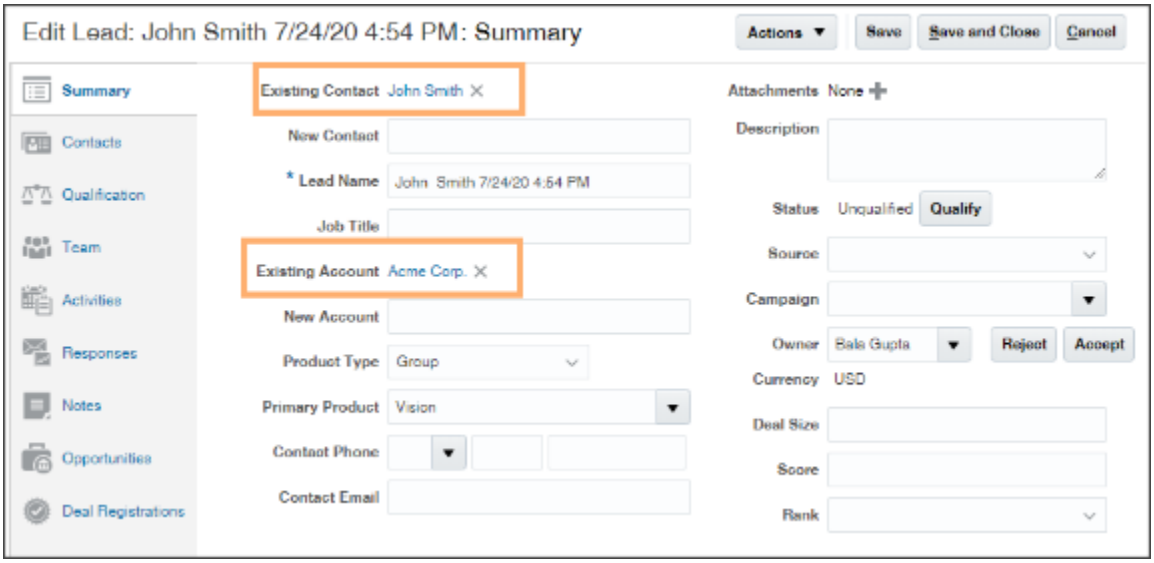


You must expose these same two fields in the Edit Lead page and other pages required for your leads process. These pages include the Leads landing page and the pages used to convert leads into opportunities.

Here's how salespeople see net new leads in the Edit Lead page from the CX Sales UI.



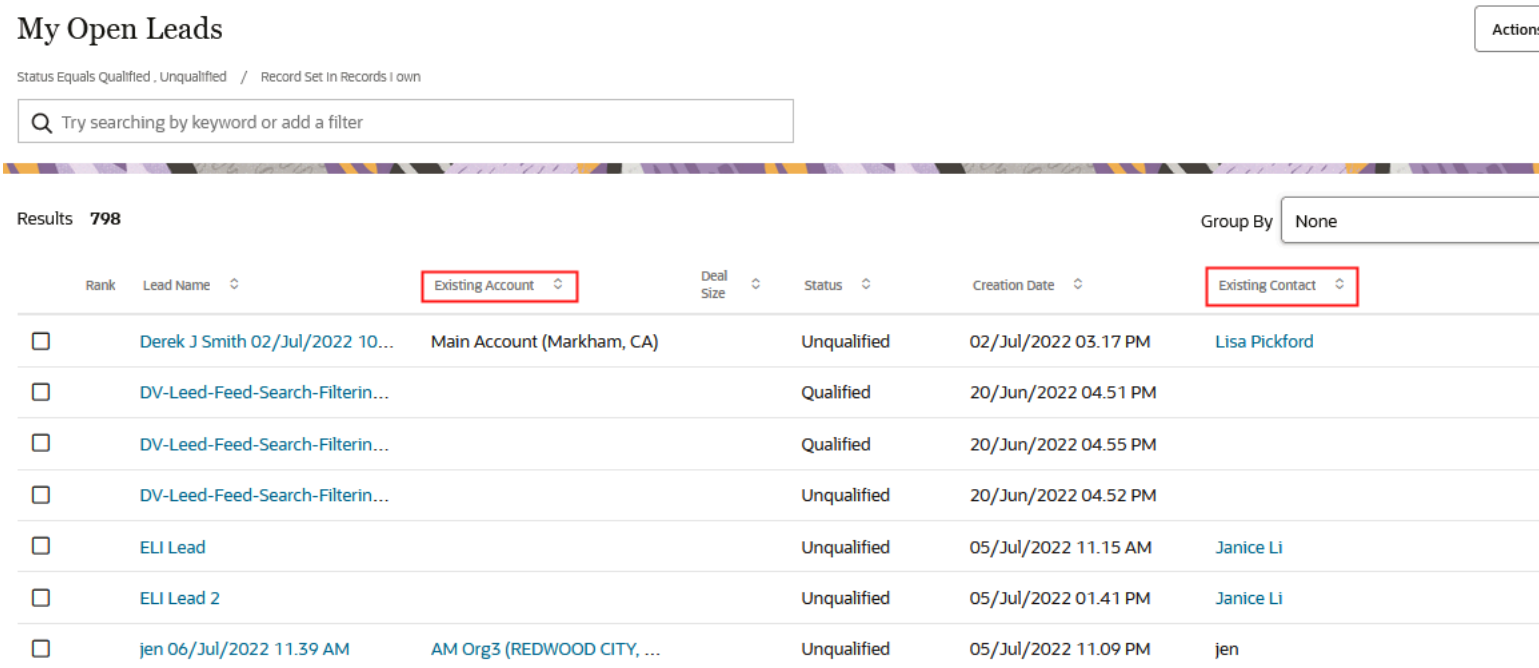
Leads for existing accounts, display the existing contacts and accounts as links:



No UI Changes Required in Digital Sales

In the Digital Sales UI, salespeople can enter accounts and contacts as text or select existing accounts and contracts in the same field, so no UI changes are required. The screenshot highlights the **Existing Account** and **Existing Contact** columns on the list page. Salespeople can enter an account or contact as text or select an existing record in these fields.

You can also use the **Account Name** and **Contact Name** fields for the same purpose. These fields are equivalent.



Add the New Account and New Contact Fields to the UI

You must add the New Account and New Contact fields to the leads pages that salespeople use to create and qualify net new leads.

You may want to add the two fields to these pages. The table gives the CX Sales page names and lists the equivalent names in Application Composer.

UI Page Name	Application Composer Page Name	Comments
Leads	Landing Page	This is the landing page that opens when you navigate to the work area. Salespeople should see the New Account field displayed in the list of leads.
Create Lead	Creation Page	Add the fields to the create page if you want salespeople to create net new leads manually in the UI. If a salesperson comes back with a few business cards from a trade show, she may want to create leads individually.
Edit Lead	Details Page	This is the page that inside sales agents will use to verify the contact and account information, so you must expose both the fields. You must expose the fields here to display any net new leads you import using the lead import macro.
Convert Lead	Lead Convert Page	Converting a lead from a net new lead creates a new account, a new contact, and a new opportunity. Expose both fields so agents can see what they are converting.

UI Page Name	Application Composer Page Name	Comments
Convert Leads	Mass Lead Convert Page	Page you use to convert multiple leads at the same time using the Qualify action from the list page.

If you're adding the fields to the Digital Sales UIs, then you must use VB Studio instead of Application Composer. For an example, see "Add a Custom Field to the Edit Contact Page" in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative.

If you're adding the fields to CX Sales UIs, follow these steps:

1. Create and activate a sandbox.
2. Create custom layouts for the appropriate pages and add the fields.
3. Review your work in the leads pages.
4. Publish the sandbox.

Create and Activate a Sandbox

To start customizing the CX Sales UI, activate a sandbox.

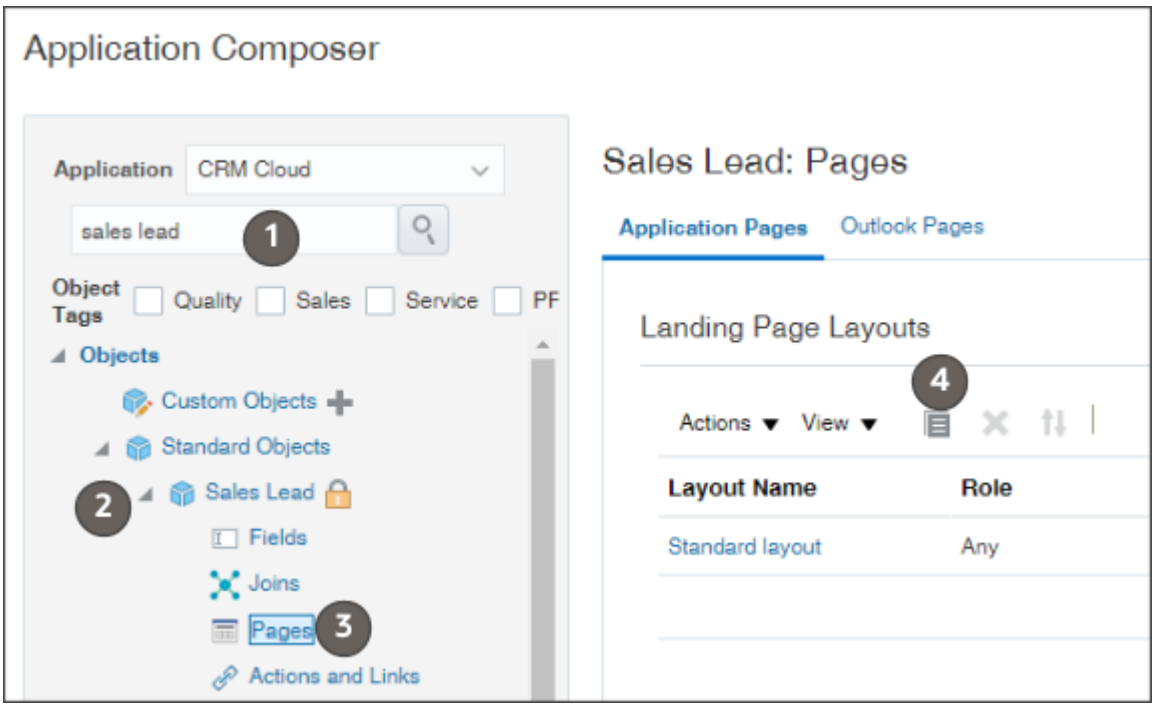
1. Click **Navigator** > **Configuration** > **Sandboxes**.
2. On the Sandboxes page, click **Create Sandbox**.
3. Enter a name for your sandbox.
4. In the All Tools section, select **Application Composer** as the tool you want to activate for this sandbox.
5. Click **Create and Enter** to create and enter the sandbox.

The application displays a bar at the top of the page with the sandbox name.

Add the New Account and New Contact Fields to the CX Sales Lead UIs

1. In the Navigator, click **Application Composer** located under the **Configuration** heading.

2. In the left pane of the Application Composer page, search for the Sales Lead object (callout 1 in the screenshot).



3. Open the **Sales Lead** object (callout 2).
4. Click **Pages** (callout 3).
5. For each of the pages where you need to expose the fields, do the following:

    a. Locate the page.
    b. Click **Duplicate** (callout 4).
    c. In the Duplicate Layout window, enter a new name for your layout or just click **Save and Edit**.
    d. On the Layout page, click **Edit** (the pencil icon).
    e. Scroll down in the **Available Fields** column to locate the **New Account** and **New Contact** fields and move them to the **Selected Fields** column.
    f. Use the arrow buttons to move the fields where you want them.
    g. Click **Save and Close**.

    You're returned to the Layout page, which reflects your changes.
    h. Click **Done**.

    You're returned to the Application Composer page.

Test Your Changes

Here's how to test changes you made in CX Sales pages:

1. Click **Home** (the icon located at the top of the page).
2. Navigate to the Leads work area by clicking **Sales** > **Leads**.
3. Check to see if the **New Account** field displays as a column on the list page.
4. Click **Create Lead**.
5. Enter a lead name only.
6. Click **Save and Continue**.

7. On the Edit Lead page, enter test data in the **New Account** and **New Contact** fields.
8. Click **Save**.
9. Click **Actions** > **Convert**.
10. On the Convert Lead page, click **Submit**.

    After the lead processing completes, the Edit Lead page displays the converted lead. The contact displays as a link in the Existing Contact field. And the account as a link in the Existing Account field.
11. You can drill down in the account and contact links to see that the account and contact records have been created for you. From the Opportunity tab on the lead, you can also drill down into the opportunity created from the lead.
12. If you need to make further changes, you can go back to Application Composer and edit the layouts again.

Publish Your Sandbox

After testing, publish your sandbox:

1. Click on the sandbox name in the sandbox toolbar and select **Publish**.
2. Click **OK** in the dialog box to navigate to the Sandbox Detail page.
3. In the Sandbox Detail page, click **Publish** again.
4. Click **Continue to Publish** in the warning message to confirm that you want to publish.

Next Gen Sales UI Only

If you need to make changes such as adding custom fields to the data model for the Digital Sales (Next Gen Sales) UI, then you use Application Composer first to make those changes as describes in this topic. You can then use VB Studio to expose those changes on the Digital Sales UI.

In Application Composer, you make data model changes inside a sandbox. You can see those data model changes in VB Studio provided that your workspace is associated with the sandbox you're using in Application Composer. For more information, follow the example topic, "Add a Custom Field to the Edit Contact Page", in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative.

Add the Redirect to Opportunity After Conversion Check Box

Sales administrators can add the Redirect to Opportunity After Conversion check box to the Convert Lead page so that users can choose whether to be redirected immediately to the opportunity page after the successful conversion.

This reduces the time spent going to the Opportunities subtab on the Lead and finding the right opportunity to open.

> **Note:** The redirect to opportunity feature is available for single lead conversions only. The check box is deselected by default and isn't available from the Mass Convert Layout Pages for Leads.

Use these steps to add the **Redirect to Opportunity After Conversion** check box to the Convert Lead page.

1. Sign in as a sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Application Composer**, in the Configuration category.
4. In the navigation tree, expand **Standard Objects**, expand **Sales Lead**, and click **Pages**.
5. Ensure that the **Application Pages** tab is selected.
6. On the Application Pages tab, under the Lead Convert Page Layouts section, duplicate the standard layout to create a new layout to edit.
7. Type a new layout name and click **Save and Edit**.

   The Lead Convert Page Layout page appears.

8. Click the **Edit** icon next to **Lead Convert Page Layout**.
9. From the **Configure Detail Form** region, move the **Redirect to Opportunity After Conversion** field from the Available Fields area to the Selected Fields area.
10. Click **Save and Close**.
11. On the Edit Layout page, click **Done** and ensure that the layout status for your Lead Convert Page Layout is set to Active.
12. Verify that you can see the **Redirect to Opportunity After Conversion** check box on the Convert Leads page for a selected lead that you want to convert.
13. Publish your sandbox.

FAQs for Sales Leads

How can I provide Account team access to Leads?

A user with the IT Security Manager job role can provide access to the leads associated with an account team by creating a new data security policy for the Sales Lead database resource.

Using the security console, they can specify the access level such as view or update sales lead data, and then assign what role, such as Sales Representative or Sales Manager, to apply to the security policy. Finally, they must specify a condition for the new data security policy. For example,

```
Access the sales lead for table MKL_LM_LEADS where they are a member of the lead sales account team or in
 the management chain
 of a lead sales account team member.
```

For more information, see the Create a Data Security Policy for a Database Resource section in the topic Manage Database Resources topic of the Oracle CX Securing CX Sales and Fusion Service guide on Oracle Help Center (https://docs.oracle.com).

Related Topics

- Manage Database Resources

Can I update a lead number?

No. A lead number can't be updated after the lead record is created. The only option is to delete the existing lead and recreate it with the data you want.

How come I don't see products in leads or opportunities?

You must enable and publish product and product groups in Adaptive Search before you see them in the leads and opportunities UIs. You can do this either using Setup Assistant or using this procedure.

1. Open the task **Configure Adaptive Search** from the Setup and Maintenance work area:
    - Offering: Sales

- Functional Area: Sales Foundation
- Show: All Tasks
- Task: Configure Adaptive Search

2. Click the **Setup** tab.
3. Select **Product** and **Product Group** and any other object you want to enable.
4. From the **Actions** menu, select **Full Publish**.
5. You can monitor the progress of the publish process on the Monitor tab.

Related Topics

- Speed Up Your Initial Setup with Setup Assistant
- Run Setup Assistant

How do I notify a lead owner by email when a lead is assigned to them?

You can create email notifications using the Routines feature. Routines is the fastest way of creating email notifications. It doesn't require any Groovy scripting, and automatically appends a link to the lead in the email.

The following steps apply mainly to Redwood User Experience (UX) users. However, Simplified UI users can also use these steps but note that some options on the Trigger page aren't available for Simplified UI users.

1. Open Application Composer outside a sandbox (**Navigator** > **Configuration** > **Application Composer**).
2. Click **Routines**.
3. Click **Create Routine**.
4. Click **Skip Templates**.
5. Enter a name and description. For example: Email Notification for New Lead Owner. Notify owner that a lead was assigned to them.
6. Select the object, in this case Sales Lead.
7. Click **Next**.
8. On the Trigger page:
    - Redwood UX users have the following options:
        - Hourly
        - Daily
        - Weekly
        - Monthly
        - Yearly
        - Record created
        - Record deleted
        - Attribute changed
    - Simplified UI users have the following options:
        - Hourly
        - Daily
        - Weekly
        - Monthly
        - Yearly

> **Note:** For Simplified users, if the existing options don't suit your requirements, you can use Rules to specify a trigger when the routine should run. For example, you can create and apply certain rule conditions to Attribute Owner ID, or Last Update Date, or Status and so on to trigger and submit the routine.

9. For Redwood UX users, select **Attribute changed** and then select **Owner ID** from the list of attributes because you're sending the email after the owner is updated in the record.

> **Note:** Redwood User Experience (UX) users will have access to more triggers to specify when the routine runs. For example, in addition to the defined recurring schedules, they can choose to run the routine as soon as an attribute is changed or when a record is created, updated, or deleted.

10. Click **Next**.
11. On the Actions page, select **Send Email** as the action type.
12. In the **To** field, select **Owner ID**.
13. In the **Subject** and **Body** fields, you can enter both text and mail-merge attributes. For example, to include the lead name, enter **Name** in the **Attribute** search box, press **Return**, and click **Lead Name**. Your action enters the mail-merge field `{{$Name}}`.

> **Note:** The email sent to the new owner gets automatically appended with a link to open the lead.

14. Optionally, you can add another action. For example, in addition to sending the email you can create a task by selecting **Create Task** from the **Action Type** list and entering the task attributes.
15. Click **Next**.
16. In the Rules, page you can create rules and groups of rules that select the leads the notification runs on. In this example, we're notifying the owner when any lead is assigned to them, so you can skip this step.
17. Click **Next**.
18. On the Review page, review your entries and click **Submit**.

See *Overview of Routines* for more information about routines.

21 Competitors

About Sales Competitors

The sales organization can track and analyze the impact competitors are having on sales by recording the competitors in each opportunity. By default, the sales application requires salespeople to enter the primary competitor whenever they close an opportunity. Unless you changed that default, you must create the list of competitors to enable opportunity closing.

To create the list of competitors, you're only required to enter competitor names. However, you can track more details about each competitor in the Competitors work area. You can enter company details, including its line of business, and status.

The Opportunities tab automatically displays all of the opportunities where that competitor has been selected as the primary competitor. Access to the Competitors work area is restricted to users with the Sales Administrator job role. However, sales managers and others in the sales organization can access preconfigured reports to view the effects of the competitors entered in opportunities.

Setup Assistant and Competitors

You can create up to 15 competitors using Setup Assistant. For each competitor you can enter:

- Name and suffix
- Line of business
- Threat level
- Organization size

You must go to the Competitors work area in Sales to enter the other details.

Related Topics

- Overview of Sales Competitors
- Manage Sales Competitors

Review the List of Competitors and Create Additional Ones

Here's how to review the list of competitors you created using Setup Assistant, add more information, and create new ones. The names of the competitors you create are available for selection in opportunities in both CX Sales and Digital Sales.

Here's how to create a competitor in the CX Sales UI. Salespeople enter the names of competitors when they close opportunities in both Digital Sales and CX Sales. However, detailed information about each competitor is available only in the Competitors work area in the CX Sales UI.

1. Click **Navigator** > **Sales** > **Competitors**.
2. To create a new competitor:
    a. On the Review Competitors page, click **Create**.
    b. In the Create Competitor page, enter the competitor name in the **Organization Name** field.
    c. You can enter a suffix, such as `Ltd.` or `Co.`, in the **Name Suffix** field.

       The suffix is automatically appended to the name in the application.
    d. Select a threat level. Salespeople can use the threat level to filter their competitor searches.
    e. Optionally, enter additional information about the competitor.

       Any additional information you enter is only visible in the Competitors work area. Only the competitor name is visible while selecting competitors in opportunities.
    f. Click **Save and Edit**.
    g. The application checks to see if any other organizations are potential duplicates. If there are existing companies with a similar name, you can choose to edit one of these instead.
    h. You can enter additional competitor information on the Edit Competitor page.
3. To review or edit an existing competitor, click on the competitor name link.

Related Topics

- Manage Sales Competitors
- Enable Competitors in Opportunities
- View Competitor Information Outside Opportunities
- Associate Competitors with Opportunities
- Enable Competitors in Leads

22 Opportunities

Overview of Guided Sales Processes

You can guide salespeople through a structured sales process as they pursue an opportunity from the initial qualifying stage to closing the deal. In CX Sales, you build the guided sales process exclusively as a sales method. In Digital Sales, sales methods provide the scaffolding for a much more full-featured process provided by orchestrations. Using sales methods in CX Sales, you can provide only a single set of linear recommendations. Orchestrations in Digital Sales, by contrast, can have multiple branches to suggest different actions when a particular step in the sales process does or doesn't succeed.

Each opportunity must be associated to a sales method that takes the salesperson through a series of sales stages. For each sales stage, you can specify any of the following:

- Prepopulate the win probability for opportunities at that stage.

  If you're including opportunities in forecasts using win probability, then prepopulating a default win probability ensures that opportunities don't get left out by mistake.
- Specify which field entries are required

  For example, you may require salespeople to enter the close date or budget for opportunities that are about to close.

For Digital Sales, you suggest appropriate tasks, documents, and actions for each sales stage by creating orchestrations. At each sales stage, you specify what information the salesperson needs to provide and what actions they need to take to move the opportunity to the next sales stage. You can also provide automated steps that take actions behind the scenes to follow up when things don't go as planned. For example, you can automatically send a follow-up email if a customer doesn't respond when a salesperson contacts them. See the topic *Guide Salespeople Through Best Practices Using Orchestration* for more information.

CX Sales doesn't include orchestrations, but, for each sales stage, you can specify any of the following:

- The tasks you want assigned
- Documents you want to provide as part of Sales Coach

  See the topic *Overview of Sales Methods, Sales Stages, and Sales Coach* in the Implementation Reference guide.
- Assessments

  See the topic *Overview of Assessments* in the Implementation Reference guide.

Oracle provides several predefined sales methods, which you can modify to your needs. These include:

- Accelerated Sales Process

  A sales process for deals that involve a single decision maker and short time frame.
- Standard Sales Process

  A sales process designed for longer sales cycles, where decisions are made by committee.

You can create multiple sales methods for different sales situations and products. By default, all opportunities use the sales method you specified as the default in the Configure Opportunities quick setup page. In Digital Sales, salespeople

get to choose one of the available sales methods when they create an opportunity. If you want to give salespeople the same option of choosing a sales method in CX Sales opportunity pages, then you must use Application Composer to display the Sales Method field in the UI.

Setup Assistant and Opportunities

You use Setup Assistant to configure basic opportunity behavior, but you must still supply the details of the sales process you want the sales organization to follow.

What You Can Do in Setup Assistant

- Select the default sales method.
- Add, edit, or reorder sales stages.
- Specify if win or loss reasons are required when closing opportunities.
- Specify the default close date for opportunities.
  If salespeople don't enter a close date in an opportunity, the close date is set to the creation date plus the number you entered. The close date affects the way opportunities are forecast in the CX Sales UI.

What You Must Complete Manually

- Create the content for the sales method that you selected.
  For example, for each sales stage in CX Sales, you can suggest action items, make some entries required, and provide documents and assessments.
- Edit the list of opportunity statuses.
- Edit the list of win/loss reasons salespeople enter when closing opportunities.
- In Digital Sales, specify what information the salesperson needs to provide and what actions they need to take to move the opportunity to the next sales stage and to complete the sale. See *Guide Salespeople Through Best Practices Using Orchestration*.

Summary of Opportunity Setup

Configure opportunities to guide salespeople through a structured sales process that's appropriate to your business.

Here's a summary of the setup tasks covered in this chapter.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Digital Sales and CX Sales	You can review and change the default sales method and change the opportunity close behavior on the	**Setup and Maintenance** > **Sales** > **Opportunities** > **Quick Setup (gears icon)**	See the following topics in this chapter:

Step	Applies To	Description	Navigation	Where to Get More Details
		opportunity Quick Setup page. However, you must use the Manage Sales Methods and Sales Stages task to create new sales methods or properly configure the one you chose.	**Setup and Maintenance** > **Sales** > **Opportunities** > **Manage Sales Methods and Sales Stages**	• *What Opportunity Behavior You Can Configure and Where* • *Configure Basic Opportunity Behavior* • *Create and Edit Sales Methods and Stages*
2	Digital Sales and CX Sales	Optionally, configure opportunity statuses.	**Setup and Maintenance** > **Sales** > **Opportunities** > **Manage Sales Methods and Sales Stages**	See the topic: *Modify Opportunity Statuses*
3	Digital Sales and CX Sales	Optionally, configure the list of win/loss reasons salespeople enter when they close opportunities.	**Setup and Maintenance** > **Sales** > **Opportunities** > **Manage Set Enabled Lookups**	See the topic: *Modify the List of Reasons Opportunities Are Won or Lost*
4	Digital Sales and CX Sales	You can enable further aggregations on custom opportunity fields and define the aggregation label. For example, for Deal Size, you might want to aggregate a custom revenue field or aggregate a different custom revenue field for an Expected Revenue aggregation.	**Setup and Maintenance** > **Sales** > **Configure Adaptive Search** > **Configure UI** > **Enable for Group By**	See the topic: *Enable Group By and Custom Aggregations for Opportunities*
5	Digital Sales only	Before salespeople can create recurring revenue schedules in Digital Sales, you must first enable the feature. You do this in Oracle Visual Builder Studio. You must then enable the Revenue Lines UI elements for Digital Sales.	In Digital Sales, navigate to the page that displays the area you want to extend. For example, navigate to an opportunity record and then click **View All Products** on the Products panel.**Digital Sales** > **Opportunities** > **View All Products** Under the Settings and Actions menu, select **Edit Page in Visual Builder**. **Configuration** > **Structure** > **Revenue Lines**	See the topic: • *Enable Revenue Lines UI Element*

What Opportunity Behavior You Can Configure and Where

You can configure opportunities to support your specific sales process. For basic configuration, you can use either Setup Assistant or the Configure Opportunities quick setup page (the two are equivalent). You must use other tasks to make more substantial changes.

Here's an overview of default opportunity behavior for Digital Sales and CX Sales UIs and some of the ways that you can change it.

Default Opportunity Behavior	Applies To	Changes You Can Make in Setup Assistant or in the Configure Opportunities Quick Setup Page	Additional Setup
Opportunities follow the Standard Sales Process sales method provided by Oracle.	Digital Sales and CX Sales	Oracle provides two sales methods: • Standard Sales Process (the default) • Accelerated Sales Process You can select any one of these sales methods as the default and modify its sales stages. Or you can select a sales method that you created from scratch. In Setup Assistant or Quick Setup page, you can edit the sales method sales stage names and add your own stages. To enter or edit the stage details, you must use the Manage Sales Methods and Sales Stages task.	Use the Manage Sales Methods and Sales Stages task to populate the details of each sales stage, including: • What fields are required • The actions you want salespeople to take • The tasks you want assigned (CX Sales Only) • Documents you want to provide as part of Sales Coach (CX Sales Only) • Assessments (CX Sales Only) • For the Digital Sales UI, you can suggest appropriate actions to each of the sales methods and sales stages you create using Sales Orchestration processes. See the topic: *Guide Salespeople Through Best Practices Using Orchestration*.
Salespeople are required to enter a win or loss reason for an opportunity when they close it.	Digital Sales and CX Sales	You can make the entry of the win or loss reason optional. Your entry is the equivalent of setting the profile option Close Opportunity Win/Loss Reason Required.	You can modify the list of win and loss reasons. See the Modify the List of Win/Loss reasons topic for details.
Salespeople must also enter at least one competitor before closing opportunities.	Digital Sales and CX Sales	You can make competitor entry optional. Your setting is the equivalent to setting the profile option Close Opportunity Competitor Required.	If you want salespeople to enter competitors, you must set them up as described in the Competitors chapter.

Default Opportunity Behavior	Applies To	Changes You Can Make in Setup Assistant or in the Configure Opportunities Quick Setup Page	Additional Setup
When a salesperson creates an opportunity, the application automatically sets the close date to 20 days after the creation date unless the salesperson enters a different date. The close date can affect opportunity forecasts.	Digital Sales and CX Sales	You can change the default close date. Your entry is the equivalent to setting the Opportunity Close Date Default profile option.	By default, when the salesperson closes an opportunity, the close date is automatically updated to the actual date. You can retain the previous date, by setting the profile option Opportunity Close Date Retain on Closure to Yes.
A salesperson closes an opportunity by selecting one of the closed statuses: Won, Lost, or No Sale.	Digital Sales and CX Sales	None	You can modify the list of opportunity statuses using the Manage Sales Status task. For more details, see the Modify Opportunity Statuses topic.

Configure Basic Opportunity Behavior

Here's how to select and modify a sales method for your opportunities and to change opportunity close requirements. If you're satisfied with the entries you made in Setup Assistant, you can skip this step.

1. Click **Quick Setup** (gears) icon for the **Opportunities** functional area in **Setup and Maintenance**:
    - Offering: Sales
    - Functional Area: Opportunities
    - Quick Setup
2. You can make these modifications to the sales method:
    - Select a different sales method from the **Default Sales Method** list.
    - Edit an existing sales stage name, description, or win probability.
    - Select a different phase and status for a sales stage.
    - Enter a new sales stage:
        i. Click **Add Row** (the plus sign icon).
        ii. Enter the sales stage information.
        iii. In the **Order** column, enter a decimal number to insert the new stage between new stages. For example, enter 1.5 to enter a stage between stage 1 and stage 2. To enter a sales stage at the beginning, enter a value smaller than 1, for example, 0.5 or 0.75.

        > **Note:** You shouldn't change the order of existing sales stages. An existing sales stage associated with the Won status should be the last stage in the sales stage order. The reason is if the status of your opportunity changes to Won, then the expected behavior for the sales stage in the sales method moves to the last number in the Order column.

3. Modify opportunity close behavior:
    - Make the entry of the competitor and win or loss reason optional by selecting the **No** option for each.
    - Enter a different number of days in the **Default Close Date in Days After Opportunity Creation** field.

      If salespeople don't enter a close date in an opportunity, the close date is set to the creation date plus the number you entered. The close date affects the way opportunities are forecast.

Manage Sales Methods and Stages

Use these steps to edit an existing sales method, including one of those predefined by Oracle, or to create a new sales method entirely.

Here's how to create and edit sales methods.

1. From Setup and Maintenance, open the task **Manage Sales Methods and Sales Stages**:
    - Offering: Sales
    - Functional Area: Opportunities
    - Task: Manage Sales Methods and Sales Stages
2. On the Manage Sales Methods page, edit a sales method by clicking its name or click **Create**.
3. Leave the default value of **Common Set** for the **Set** field. Other values apply for implementations that require different sales methods for different business units.
4. Enter a name for the sales method and an optional description. These entries aren't visible to salespeople by default, but can be made visible when you configure the UI.
5. To provide a default close date for opportunities when they're created, enter a number of days in **Close Window**.

   Create or edit the sales stages for the sales method as described in the following section.
6. Save your changes.

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

Create or Edit Sales Stages for Sales Methods

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

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

Field	Description
Name	Stage name visible in the UI.

Field	Description
Phase (For CX Sales only)	Select a classification of the sales stage. You can define the sales stage phases by using the Manage Sales Stage Phase Codes task from the Setup and Maintenance work area.
Description	Description visible in the UI.
Status	Use the status of **Open** for all stages representing opportunities that are still in progress.
Order	Enter a number for the order of this sales stage in the sales method.
Quota Factor	Enter any number in this field. This number is used only for legacy reports, but entry is required.
Disable	Select the Disable option to remove any unused sales stages from view. You must not disable sales stages after they're used in opportunities.
Win Probability	Enter a default win probability for opportunities in this stage.
Duration (For CX Sales only)	The number of days this stage should last. When an opportunity is in a sales stage longer than the duration, the opportunity is considered stalled. Stalled opportunities appear on the Stalled Deals Infolet and underlying report.
Stalled Deal Limit	This field is no longer in use.

If you're including opportunities in forecasts using win probability, then prepopulating a default win probability ensures that opportunities don't get left out by mistake. For example, if you automatically forecast all opportunities with a 70 percent or greater win probability, then you can set up the following predefined win probabilities. Your setup ensures opportunities in the Agreement, Negotiation, and Closed stages are included in forecasts even if a salesperson forgets to manually enter a win probability.

Sales Stage	Win Probability
Qualification	10
Opportunity	20
Building Vision	30
Presentation	50
Agreement	70
Negotiation	90

Sales Stage	Win Probability
Closed	100

3. Add any fields that you want to make required for opportunities in the Additional Required Fields region.
4. For the CX Sales UI, add any activity templates you have created in the Activity Templates region. The activity templates can automatically create tasks and appointments, which appear in the Activities tab of the Edit Opportunity page in the CX Sales UI.
5. Save your changes.

What to do next

For the Digital Sales UI, you can suggest appropriate actions to each of the sales methods and sales stages you create using Orchestration. For more information, see the topic *Guide Salespeople Through Best Practices Using Orchestration*.

Clear Cache if New Values Don't Show Up in the UI

If you don't see a new value that you created for a list of values in the Digital Sales UI, try clearing your browser cache. For performance reasons, Digital Sales uses the browser cache to store data such as lists of values and dynamic choice lists. A process clears the cache automatically every hour.

For example, if you're adding a sales stage to a sales method, you won't see the new sales stage in the Digital Sales UI until the automatic process runs and clears the browser cache. You see the new sales stage in the CX Sales UI immediately.

Modify Opportunity Statuses

The application comes with four predefined opportunity statuses: Lost, No Sale, Open, and Won. Follow these steps to add new statuses or modify the existing ones.

1. From the Setup and Maintenance work area open the **Manage Sales Status** task:
    - Offering: Sales
    - Functional Area: Opportunities
    - Show: All Tasks
    - Task: Manage Sales Status
2. Here's how to add a new status:
    a. Click **Add** (the plus sign icon).
    b. Enter a name without spaces in the **Status Code** field. The code doesn't display to users.
    c. Enter a display name in the **Status** field. This name displays in the opportunity pages in alphabetic order.
    d. Select the **Active** option.
    e. Select from one of the predefined values for **Status Category**.
3. You can modify an existing status by selecting its row.
4. Save your changes.

Modify the List of Reasons Opportunities Are Won or Lost

When they close an opportunity, salespeople enter the reasons why the opportunity was won or lost. The application comes with a predefined list that you can modify to suit your business:

- Customer not ready
- Good lead
- Install base
- Lost to competition
- Lost to internal development
- Lost to no decision
- No bandwidth
- No budget
- Other
- Price
- Product
- Relationship
- Track record

Use these steps to modify the reasons:

1. Open the task **Manage Set Enabled Lookups** from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Opportunities
    - Task: Manage Set Enabled Lookups
2. On the Manage Set Enabled Lookups page, **Lookup Type** field, enter `MOO_SETID_WIN_LOSS_REASON`.
3. Click **Search**.
4. Here's how you can add a new reason in the Lookup Codes section:
    a. Click **Add** (the plus sign icon).
    b. Enter an internal name in the **Lookup Code** field. No spaces permitted.
    c. Select **Common Set** from the **Reference Data Set** list.
    d. Select **Enabled**.
    e. Optionally, enter a start and end date.
    f. Enter the wording salespeople see as they close an opportunity in the **Meaning** field.
5. You can modify an existing win/loss reason by selecting its row.
6. Save your changes.

Enable Group By and Custom Aggregations for Opportunities

Additional predefined fields are now available for Group By and Aggregations for opportunities.

Previously, salespeople could group opportunities by Quarter, Month, and Sales Stage, and aggregate opportunity records by Opportunity Count and Revenue Amount fields. With Digital Sales, they now have access to other group-by options including group ranges and values. You can also enable the group-by feature on any supported opportunity fields including custom fields and configure aggregations to display predefined enabled aggregated fields in the opportunity pipeline list.

For example, a salesperson might want to group opportunities by a custom Invoice Date field that isn't based on the predefined Close Date field or they might want to group by Deal Size with specified defined ranges. You can enable further aggregations on custom fields and define the aggregation label. For example, for Deal Size, you might want to aggregate a custom revenue field or aggregate a different custom revenue field for an Expected Revenue aggregation.

Manage Opportunity Group By Field

Predefined fields are available for Opportunities for display as filters for your Group By search in Workspace, but you can specify field values for display as a filter in your Group By search by going to the **Configure Adaptive Search** > **Configure UI** > **Enable for Group By**.

This list contains the standard predefined configuration for opportunity group by fields.

- Sales Stage
- Win Probability (PrimaryRevenue.WinProb)
- Month - on close date (EffectiveDate)
- Quarter - on close date
- Account (CustomerAccount)

See the related topics, Set Up Search Results in Groups, and Supported Objects and Predefined Fields for Group By from the Adaptive Search and Workspace chapter of the Implementation Reference guide for more information.

Related Topics

- Set Up Search Results in Groups
- Supported Objects and Predefined Fields for Group By

Enable Revenue Lines UI Element

The Revenue Lines UI element isn't displayed as part of the Digital Sales predefined object configuration. Use the Structure page to enable the UI elements for the revenue lines object.

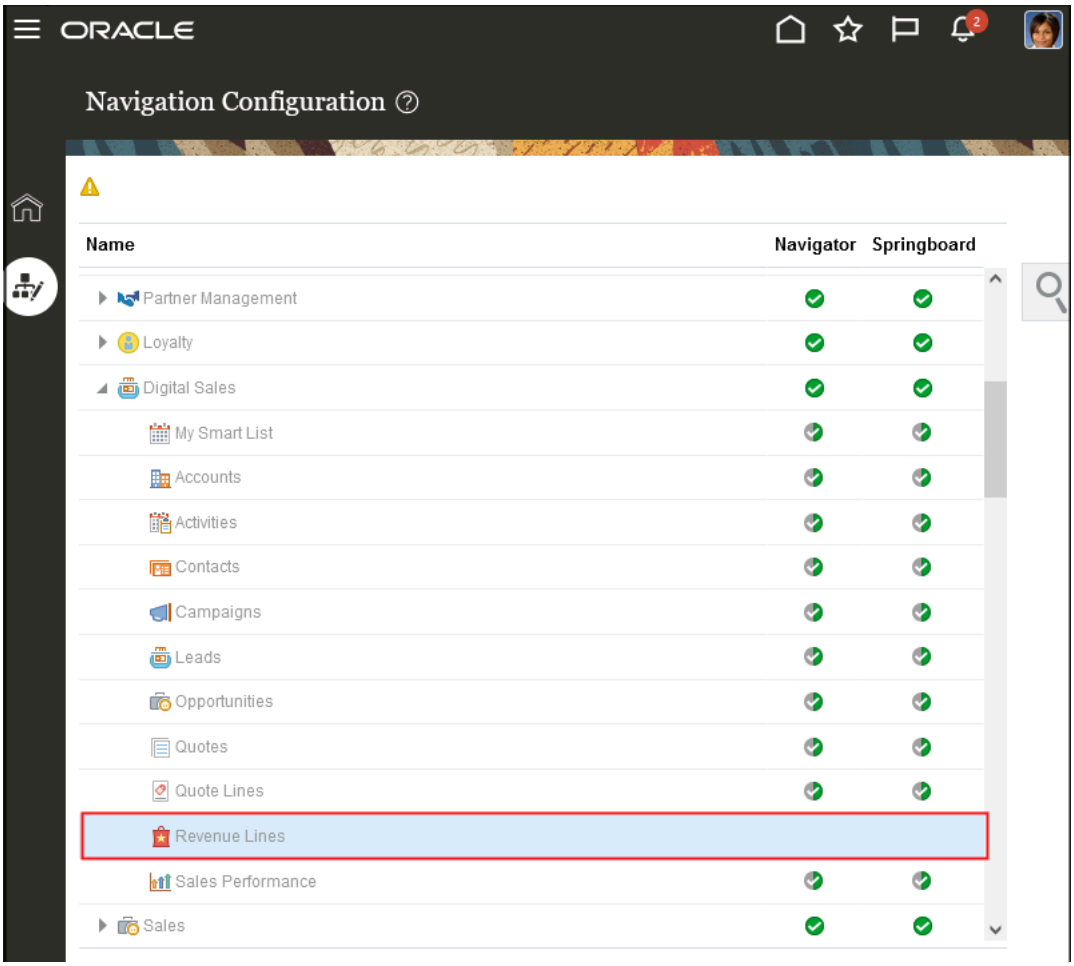
Revenue lines let salespeople view which products are being sold and how much credit they receive.

When configured, they can click the revenue lines icon under Digital Sales in the Navigator or springboard to launch the Revenue Lines landing page. The Revenue Lines UI elements include:

- Revenue Lines icon on the springboard
- Revenue Lines link in the Navigator
- Revenue Lines landing page

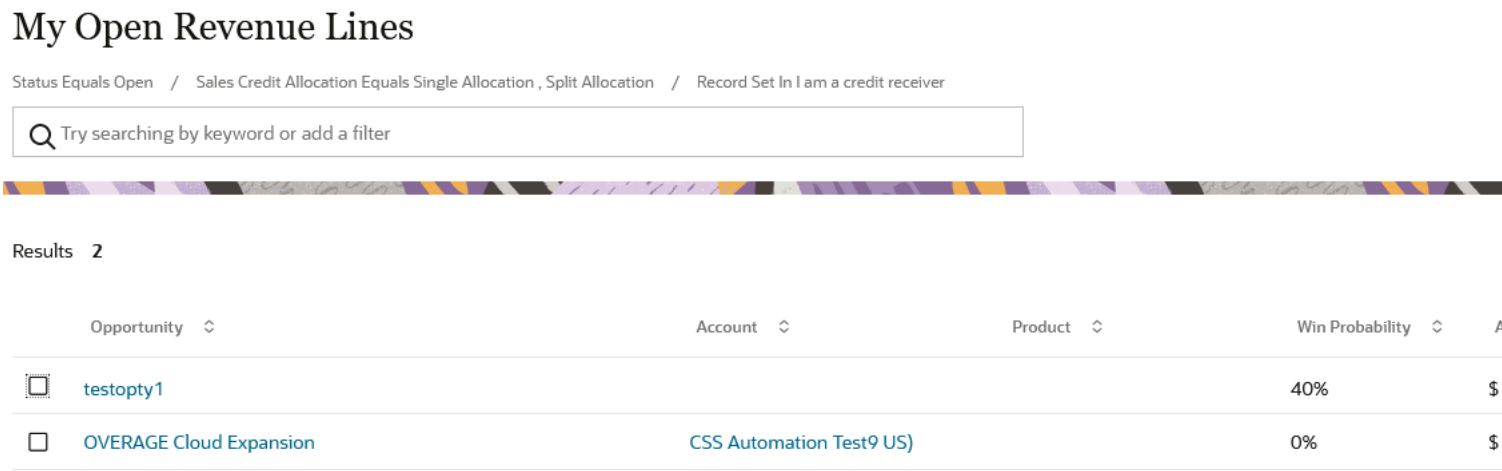
Enable the Revenue Lines UI elements for Digital Sales as follows:

1. Sign in as the sales administrator or as a setup user.
2. Activate a sandbox.
3. Navigate to **Configuration** > **Structure**.
4. In the Navigation Configuration page, select **Revenue Lines** under the Digital Sales section.



5. In the Edit Page Entry: Revenue Lines page, select **Yes** for the Show on Navigator and Show on Springboard options.
6. Click **Save and Close**.
7. Publish the sandbox.

8. Verify that the Revenue Lines item is visible under the Digital Sales group and that you can view the Revenue Lines landing page.



Related Topics

- Overview of Configuring Home Page and Navigation
- Configure the Navigator and Page Entries on the Home Page for Navigation

Enable Credit Receiver Record Set Values

You can enable credit receiver related values that appear in the opportunity search filter record sets. From the Setup and Maintenance work area, go to the Manage Standard Lookups and you can set the lookup types from the ORA_MOO_OPTY_SRCH_RS_WS: Lookup Codes page.

Prerequisites

Keep in mind the following prerequisites when salespeople assign sales credits in opportunities:

- Territories have been set up and your company is using territories for assignment of opportunity products.
- The user must have Full access to the opportunity to assign sales credits.

The record set called **I or my subordinate am a credit receiver** returns records where the signed in resource or their subordinate is a credit receiver for the opportunity. This allows sales managers and sales VPs to view the revenue lines for their entire team and see who is receiving credit.

The **I am a credit receiver** record set returns records where the signed in resource is a credit receiver for the opportunity. These record sets are predefined but they must be enabled before your salespeople can use them in Digital Sales.

> **Note:** Record sets involving subordinates, which are resources within an organization or a line manager's hierarchy, are available only to managers.

Here are the steps to enable **I am a credit receiver** and **I or my subordinate am a credit receiver** values for the opportunity search filter record set.

1. Navigate to the Setup and Maintenance work area, and use the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Standard Lookups
2. In the **Meaning** field, enter `Opportunity Filter Record Sets for Workspace.`
3. Click **Search**.
4. Select the lookup type you want to enable in the ORA_MOO_OPTY_SRCH_RS_WS: Lookup Codes page.
    - Scroll to the ORA_CREDITRECEIVER_ISME (I am a credit receiver) lookup code and select **Enabled**.
    - Scroll to the ORA_CREDITRECEIVER_MYORG (I or my subordinate am a credit receiver) lookup code and select **Enabled**.
5. Click **Save and Close**.

23 Import Opportunities

Opportunity Import Steps

You use two different Excel macros to import opportunities in two stages:

1. Use the Opportunity Import Macro to import opportunities minus the revenue lines.
2. Use the Opportunity Revenue Line Import Macro to import the revenue lines.

You can import up to 5,000 opportunities at a time using the macros.

> **Note:** While you can import additional fields by appending columns to the import macros, you can't make any other changes. You can't edit the Visual Basic for Applications (VBA) code or other functions.

Import Opportunity Information Minus the Opportunity Revenue

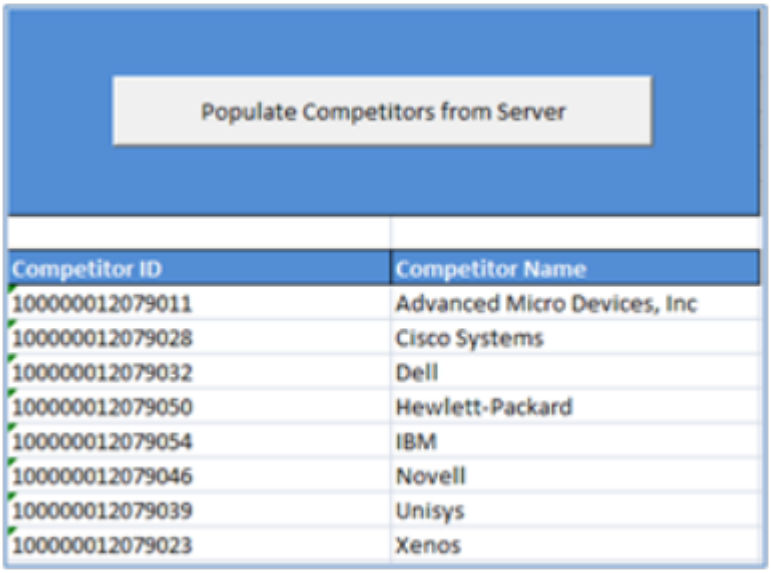
You can use an Excel macro provided by Oracle to import basic information of up to 5,000 opportunities at a time. The information you import includes the account, the opportunity owner, the primary competitor, and so on. You must import the individual revenue lines for the opportunities separately, using the opportunity revenue macro.

> **Note:** All opportunities you import with the macro are imported with the Qualification sales stage and the default sales method. To import opportunities at different stages, you must add the fields Sales Method and Sales Stage to the macro.

1. Open the opportunity import macro file.
2. Enable macros, if required.
3. If you modified opportunity statuses, click the **Status** worksheet and enter the status codes and statuses in the appropriate columns.
4. If you modified the win/loss reasons, click the **Win_Loss_Reason** worksheet and enter the codes and values in the appropriate columns.
5. On the **Competitors** worksheet, click **Populate Competitors from Server**.

6. Make these entries in the Login dialog:
    a. Enter the host name. The host name is in the portion of the URL between `https://` and `/sales`.
    b. Enter the user name and password.
    c. Click **Submit**.

    The Competitors worksheet is populated with the competitors and their IDs. Here's a screenshot of the Excel macro Competitors worksheet.



Competitor ID	Competitor Name
100000012079011	Advanced Micro Devices, Inc
100000012079028	Cisco Systems
100000012079032	Dell
100000012079050	Hewlett-Packard
100000012079054	IBM
100000012079046	Novell
100000012079039	Unisys
100000012079023	Xenos

    The macro uses this list to validate your entries in the Opportunity worksheet.
7. Click the **Resource_EMail_To_ID_Mapping** worksheet.
8. Click **Populate Resource Attributes from Server** to populate the worksheet with information about the resources you will assign as owners of the opportunities you're importing.

    The Login window appears with the user and password information you entered previously.
9. Click **Submit**.

    The worksheet populates with the resource data.
10. If you're importing additional fields, including custom fields, then do the following:
    a. Click the **Attributes Mapping** worksheet.
    b. Click **Fetch Attributes from Server**.
    c. In an empty row in the worksheet, select the attribute from the **Attribute Name** column.
    d. Enter the name you want displayed as the column heading in the Opportunity worksheet. This name displays only in the macro.
    e. Click **Update Headers** to add the column to the Opportunity worksheet.
11. Click the **Opportunity** worksheet.
12. Enter the currency code for your transactions.
13. Enter your opportunity data as described in the following table.

    You must always enter data in these columns:

    - Opportunity Name

- Account Number
- Owner E-Mail
- Expected Close Date
- Status
- Creation Date
- Last Update Date
- Created By
- Last Updated By

You may have to enter data in additional columns, depending on your settings and what type of opportunity you're importing. Here are the macro columns:

Column	What to Enter
Opportunity Number	Leave this required column blank. The macro generates the opportunity number automatically using the date and time when you click **Generate Opportunity Number**. You must generate the opportunity numbers before entering opportunity revenue lines. The application uses the opportunity number to link the opportunity to the revenue lines and to identify opportunities during updates.
Opportunity Name	Entry is required. The opportunity name identifies the opportunity in lists displayed in the Opportunity work area.
Account Number	Enter the account number. You can copy the account number from macro you used to import accounts.
Owner E-Mail	Enter the email of the opportunity owner. The email must be one of the email addresses on the Resource EMail to ID Mapping worksheet.
Win Probability	Optionally, enter a win probability. Depending on your setup, a win probability can determine if an opportunity is included in a forecast. For example, you can decide to include all opportunities with a win probability greater than 70 percent in your forecasts. See the Setting Up Forecasting chapter for details.
Expected Close Date	Enter the expected close date in the following format MM/DD/YYYY. The expected close date determines which forecast includes the opportunity. See the Forecasting chapter for details.
Status	Using the list of values, select one of the statuses available on the Status worksheet. You can also enter the statuses manually.
Win/Loss Reason	Using the list of values, enter a win or loss reason for a closed opportunity. If you enter an actual close date, then a win/loss reason is required depending on your profile option setting.

Column	What to Enter
Primary Competitor	Select the primary competitor from the list of values or enter one of the valid company names manually. For opportunities with a close date, entry in this field is required depending on the profile option setting you made.
Creation Date	Enter the opportunity creation date. The required format is YYYY-MM-DD'T'HH:MM:SS.SSS which stands for Year-Month-Date'Time'Hour:Min:Sec + UTC. You can enter the date as MM/DD/YYYY and have the macro convert your entry into the required format. For example, your entry 2017/01/2005 converts to 2017-01-05T00:00:00.000+0000.
Last Update Date	Enter the date the opportunity was last updated. This date field requires the same format as the creation date. You can enter MM/DD/YYYY, and have the macro convert your entry to the required format.
Created By	Enter the Party Number of the user who created the opportunity. You can copy the Party Number from the Resource EMail to ID Mapping worksheet. See the chapter on Importing Accounts and Contacts for details.
Last Updated By	Enter the Party Number of the user who last updated the opportunity. You can copy the Party Number from the Registry ID column in the file you exported to obtain the Party ID. See the chapter on Importing Accounts and Contacts for details.

14. When you're done with your entries, click **Create Import Activity**.

    The Login dialog appears displaying the host name, user name, and password you entered earlier.
15. Click **Submit**.
16. If the application prompts you to correct errors, then 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 Opportunity worksheet.

       Note: After you correct an error, you must click outside the field for the correction to be recognized.

    c. Click **Create Import Activity** and **Submit** again.
17. If the macro data is validated without errors then, the macro displays one of the following messages:

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.

Message	Meaning
`Unable to connect to the server at this time.`	You may have entered an incorrect host.
`Unable to submit the file import activity. Check log for details.`	Open the Errors work sheet to view the error details.

18. If your import activity was submitted successfully, then click **Activity Details**.

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

    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is `Completed`.

19. Optionally, click **Generate Log** to save a file listing the opportunities that were imported.

Import Opportunity Revenue Lines

You can use the Excel macro provided by Oracle to import basic information of up to 5,000 opportunity lines at a time.

1. Open the Opportunity Revenue Quick Import Macro file.
2. Enable macros, if required.
3. If you modified opportunity statuses, click the **Status** worksheet and enter the status codes and statuses in the appropriate columns.
4. If you modified the win/loss reasons, click the **Win_Loss_Reason** worksheet and enter the codes and values in the appropriate columns.
5. Click the **Resource_EMail_To_ID_Mapping** worksheet.
6. Click **Populate Resource Attributes from Server** to populate the worksheet with information about the resources you assign as owners of the opportunity revenue lines you're importing.
7. Make these entries in the Login dialog:
    a. Enter the host name. The host name is in the portion of the URL between `https://` and `/sales`.
    b. Enter the user name and password.
    c. Click **Submit**.
8. If you're importing additional fields, including custom fields, then do the following:
    a. Click the **Attributes Mapping** worksheet.
    b. Click **Fetch Attributes from Server**.
    c. In an empty row in the worksheet, select the attribute from the **Attribute Name** column.
    d. Enter the name you want displayed as the column heading in the Opportunity worksheet. This name displays only in the macro.
    e. Click **Update Headers** to add the column to the Opportunity Revenue worksheet.
9. Click the **Opportunity Revenue** worksheet and enter the revenue lines. You can enter multiple lines for each opportunity. Here's what to enter in the columns:

Column	What to Enter
Revenue Number	Leave this column blank. This unique identifier for the revenue line number is automatically populated by the macro when you initiate the import by clicking **Generate Import Activity**.
Opportunity Number	Enter the opportunity number linked to the revenue line you're entering. You can copy the number from the Opportunity Number column in the opportunity import macro.
Product Group Reference Number	This column identifies the sales catalog product group the customer is interested in purchasing. Enter the Product Group Reference Number from the macro you used to import product groups. See the Setting Up the Sales Catalog chapter for details. Each revenue line can have either a product group or a product. You can't enter both.
Product Number	You can enter the Product Number to indicate the specific sales catalog product the customer is interested in purchasing. You can copy the product number from the product import macro you used earlier or you can view the product numbers in the Products work area. You can't enter a product if you entered a product group. A revenue line can't have both.
Currency Code	Enter an ISO currency code for the opportunity. For example, USD, EUR, or AUD.
Status	Select the status of the opportunity revenue line from the list of values or enter one of the statuses manually. For example, Open, Won, Lost, or No Sale.
Win/Loss Reason	Using the list of values, enter a win or loss reason for a closed opportunity. If you enter an actual close date, then a win/loss reason is required depending on your profile option setting.
Actual Close Date	For closed opportunities, enter the date the opportunity was closed in the following format MM/DD/YYYY. If you enter a close date, you must also enter a primary competitor and a win/loss reason, depending on the profile option settings you made.
Owner E-Mail	Enter the email of the opportunity revenue line owner. The email must be one of the email addresses on the Resource EMail to ID Mapping worksheet.
Quantity	Enter the number of products or product groups that the customer is interested in.
Estimated Price	Enter the estimated price per unit for the product group or product.

Column	What to Enter
Amount	Leave this column blank. The macro automatically calculates the amount when you import.

10. When you're done with your entries, click **Create Import Activity**.

    The Login dialog displays the host name, user name, and password you entered earlier.
11. Click **Submit**.
12. If the application prompts you to correct errors, then 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 Template worksheet.

       Note: After you correct an error, you must click outside the field for the correction to be recognized.
    c. Click **Create Import Activity** and **Submit** again.
13. If the macro data is validated without errors, then the macro displays one of the following messages:

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.
`Unable to submit the file import activity. Check log for details.`	You most likely entered the wrong mapping number or the user doesn't have the correct permissions. Open the Errors work sheet to view the error details.

14. If your import activity was submitted successfully, then click **Activity Details**.

    The Activity Details window appears, listing the import activity name, its ID, and its status.
    - If the import activity is still in progress, you can refresh the status periodically by clicking **Refresh**.
    - If your import completed successfully, then the status listed is `Completed`.
15. Optionally, click **Generate Log** to save a file listing the opportunities that were imported.

Validate the Opportunities You Imported

You can validate the opportunities you imported using specific filter methods from the Opportunities work area.

1. Sign in as a salesperson with the sales administrator job role. Sales administrators have broad access to sales data.
2. Navigate to the Opportunities work area.
3. Enter filter criteria to view and verify that the list of records returned includes your imported opportunities.

24 Orchestration

What's Orchestration and how do I enable it?

Orchestration is a feature that guides salespeople through best sales practices for different sales situations. It also helps eliminate the need for training on various nonstandard procedures unique to specific businesses. For example, through sales orchestration, salespeople receive a sequence of actionable communication steps designed to get the attention of their unresponsive prospects.

Let's say you want to provide different recommended steps for your sales organization to follow when qualifying sales leads from different lead sources, or when progressing opportunities based on product, or opportunity type, and so on. For each orchestration stage, you can specify step sequences with logical branches to perform tasks such as set up a appointment, trigger an automation, or take an action best suited for a sales situation.

Orchestration helps salespeople by providing sales content in the context of performed actions. For example, to help salespeople qualify leads, you can model qualification flows to qualify and convert leads. You can model cadence flows to engage unresponsive prospects and retire them if multiple attempts to contact them has proved unsuccessful. Similarly, you can use orchestration to recommend the best actions to progress opportunities through the sales cycle, handle adverse sales-situations, and leverage automation to collect key data without manual data entry.

Orchestration provides automated steps that take actions behind the scenes and follow up when things don't go as planned. For example, you can automatically send a follow-up email if a customer doesn't respond when a salesperson contacts them. Orchestration steps that require salespeople to take action appear on the Guidance panel in opportunity and lead overview pages. The panel gets displayed only if there's an active orchestration running on that specific record. In addition, orchestration can create tasks and appointments to support manual steps.

For more information, see *Enable the Orchestration Feature* in the How do I get started with Orchestration? solution playbook on the *Oracle Help Center Sales* > *Playbooks* page.

25 Sales Quotas

Overview of Sales Quota Setup

Quotas are targets salespeople strive to reach. Set up this feature to simplify assigning quotas to salespeople and to track their progress. This chapter covers the basic setup for quota management using the UI. It doesn't cover quota import or advanced quota calculation features. Quotas functionality is available only in the CX Sales UI.

Here are the setup steps.

Step	Applies To	Description	Navigation	Where to Get More Details
1	CX Sales	You previously set up sales territories. Each salesperson eligible to receive a quota must be assigned to an active territory. Quota calculations rely on territory coverage. If you plan to use quota calculations, then make sure that territories have dimensional coverage defined.	**Navigator** > **Sales** > **Territories**	See the Sales Territories and Assignment chapter.
2	CX Sales	Seasonality applies percentages to split a quota over months or quarters to factor in seasonal fluctuations. Seasonality factor groups can be associated with quota plans or specific territories to account for variations in sales seasonality among different territories. Instead of entering quotas for each period of the year, you rely instead on seasonality to split your annual quota into period quotas. This task is optional.	**Setup and Maintenance** > **Sales** > **Quotas** > **Manage Sales Quota Seasonality Groups**	See the topic: *Set Up Sales Quotas*
3	CX Sales	The sales revenue goal is predefined for revenue quotas. You can add other types of goals, such as volume. This is optional.	**Navigator** > **Quotas** > **Tasks (the side panel)** > **Manage Sales Goals**	See the topic *Sales Goals* in the Implementation Reference guide
4	CX Sales	Create a sales quota plan for your fiscal year. One plan per fiscal year is required for tracking quotas	**Setup and Maintenance** > **Sales** > **Quotas** > **Manage Sales Quota Plans**	See the topic: *Set Up Sales Quotas*

Step	Applies To	Description	Navigation	Where to Get More Details
		for the entire territory hierarchy. The plan must be activated before you can allocate sales quotas.		
5	CX Sales	Allocate sales quotas starting from the root territory down the sales territory hierarchy.	**Navigator** > **Sales** > **Quotas**	See the topic: *Set Up Sales Quotas*

Set Up Sales Quotas

Your sales organization sets sales quotas starting at the top of the territory hierarchy. Quotas pass down through the hierarchy to territories and the owners.

You create a sales quota plan to track the quotas for a year. Seasonality factors automatically split yearly quota into period quotas according to known seasonal fluctuations.

Create a Sales Quota Plan

This sales quota plan uses seasonality, which isn't required.

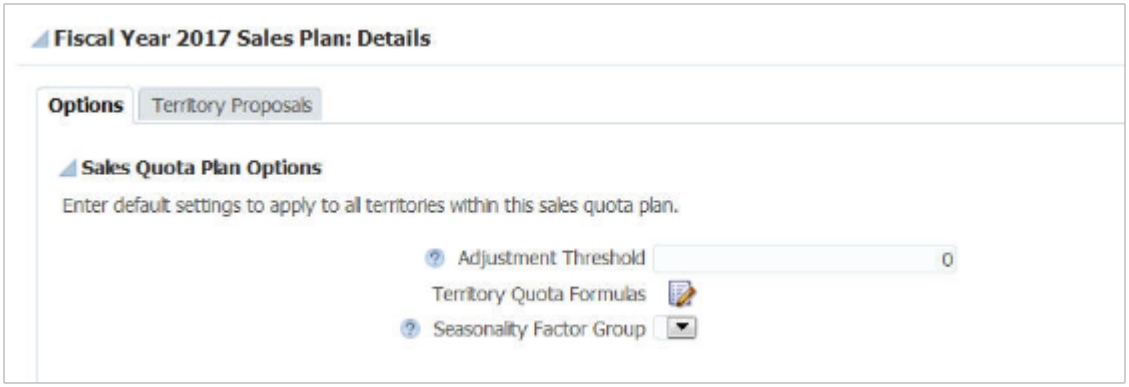
1. Open the **Manage Sales Quota Seasonality Groups** task from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Quotas
    - Task: Manage Sales Quota Seasonality Groups
2. Create a new group.
3. In the Seasonality Factors region, enter the factor percentages for time periods. Percentages must add up to 100.
4. Click **Save and Close**.
5. Open the **Manage Sales Quota Plans** task from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Quotas
    - Task: Manage Sales Quota Plans
6. Click **Create**.
7. Enter information for your new sales quota plan.

Field	Value
Calculate Default Territory Quota	Deselect. If selected, the application calculates the quotas for each of the territories using the default territory quota formula.
Track	Select. Only one plan can track quotas for the year.

Field	Value
Copy Quotas From	Leave Blank. After creating your first sales quota plan, copy a previous plan for a quick way to create a new plan.

8. Click **Save and Close**.
9. On the Options tab, select the name of your seasonality factor group.

   Here's the Options tab.



10. Click **Save**.
11. With your new quota plan selected in the list of plans, click the **Activate** button.
12. Set the activation to right now plus a few minutes in the future.
13. Click **OK**.

    The initial status is Pending Activation. Refresh the page to verify that the status changed to Active.
14. A sales revenue goal is automatically assigned to every territory owner during the annual quota planning process. Upon activation, sales managers can sign in to the application and begin allocating revenue quotas to their teams. Click Synchronize if you suspect the territory hierarchy for quotas isn't current.

Allocate Sales Quotas

Use the following steps to allocate sales quotas to territories. Allocate quotas to each territory from the top of the territory hierarchy down. You can allocate a quota to a territory only after you allocate the quotas for all the territories higher in the territory hierarchy.

1. Navigate to Quotas.
2. Select your activated quota plan.
3. In the Edit Sales Quotas region, verify that the territory quotas and owners' quotas are zero.
4. Select the root territory in the hierarchy.
5. Enter a territory quota amount and a resource quota amount for the year for the whole organization.
6. Click **Publish** and verify that the status changed from Not Published to Published.
7. For each child territory of the root territory, enter a territory quota amount and an owner's quota amount.
8. Select the parent territory and click **Details** for the territory.

   The Details table shows the rollup quotas total for the child territories and the variance from the parent quota.
9. Click **Save**.

10. Click the Territory Quota tab and verify that as part of the publish process, seasonality was automatically applied to split the annual quota into period quotas.
11. In the Manage Sales Quotas page, select a child territory of the root territory and click **Publish**.

    Note: If the Publish button is disabled, this could be the result of one of the following:
    - You did not publish the parent territory.
    - You don't own the parent territory.
    - The territory was already published. You can't republish a territory at the bottom of the hierarchy.

12. Verify that the status is Published.

    The application notifies the territory owner and the analyst that the territory was published.
13. Click **Save**.

    The following table lists common publishing errors and their solutions.

Error	Steps to Resolve
You can't publish quota for the territory because the territory has revenue quota assigned prior to the territory quota start date.	a. Select the parent territory. b. Click **Details** to navigate to the Edit Sales Quotas page. c. Select the territory. d. Select the Territory Quota tab. e. Set the period quota to zero for any period prior to the territory quota start date.
The total quota of all quarters for the territory doesn't equal the annual quota.	a. Select the parent territory. b. Click **Details** to navigate to the Edit Sales Quotas page. c. Select the territory. d. Select the Territory Quota tab. e. Update the period quotas so their sum equals the territory quota.
You can't perform this action for the selected record.	This error occurs when you attempt to publish a quota for a territory that you own. Only administrators and owners of parent territories can publish quotas for this territory.

Schedule Quota Processes

Sales managers or administrators frequently make changes to active territories directly, using territory proposals, or through web services. Schedule synchronization to run frequently to provide the latest structure for allocating quotas.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. Click **Schedule New Process**.
3. For the Type field, select **Job**.
4. In the name field list, click **Search**.
5. Search for **Synchronize Quotas**.
6. Select Synchronize Quotas and click **OK**.

7. In the Parameters region of the Process Details page, select the sales quota plan.
8. Click **Advanced**.
9. In the Schedule tab, select **Using a schedule**.
10. Select the **Daily** frequency.
11. Change the start date to when you want to start running the process, and select the time of day when you want it to run.
12. Change the end date to a future date.
13. Use the Notification tab to add notifications to specific people when the process completes.
14. Click **Submit**.

26 Forecasting

What are some common opportunity forecasting scenarios?

Your sales organization can forecast opportunities by sales territory for each forecasting period and managers can adjust those forecasts as required. The forecasting feature is available in the Classic user experience only. There are two broad forecasting scenarios that require different setup:

- Scenario 1: Forecasting by Opportunity Owner
- Scenario 2: Forecasting When You Use Sales Territories to Assign Opportunities

Scenario 1: Forecasting by Opportunity Owner

Individual salespeople own their opportunities and forecast them. The forecasts are passed up the management hierarchy for adjustment and approval. Your organization doesn't use geography, product, industry, or other territory dimensions to assign salespeople to opportunities. If your sales process meets these criteria, then setup is as simple as selecting Enable Sales Forecasting in Setup Assistant. The application sets up everything you need:

- Sets up a sales territory hierarchy that mirrors your sales resource hierarchy, with the individual salespeople as territory owners.
- Assigns opportunities to the territory of their owners. This means that opportunity revenue is automatically included in the forecasts of the opportunity owner.
  When new accounts or opportunities come in, managers assign ownership to one of their salespeople and the application automatically includes those accounts and opportunities in each owner's territory.
- Keeps the sales territories in sync if your resource hierarchy changes.
  If you do update the sales hierarchy and want to see that the changes reflected in your forecasts right away, then you must run the Refresh Territories from Resources process. The process is set to automatically run before each forecasting window freeze.
- Rolls up forecasts up the sales resource hierarchy.
- Enables quarterly forecasts.
- Creates monthly forecast submission windows, so the sales organization can adjust forecasts and pass them up the management chain. All you have to do is adjust the forecast submission window dates.
- Makes it possible for your sales organization to forecast product totals.

If you enable forecasting by opportunity owner in Setup Assistant, then each resource can only be in one territory (their own) and you can't use sales territories to assign opportunities by geography, product, industry, or any other dimension.

Scenario 2: Forecasting When You Use Sales Territories to Assign Opportunities

You assign opportunities to sales territories by geography, product, industry, and other dimensions. You may have multiple salespeople from different parts of the sales organization involved in the sale. The opportunity owner is not

necessarily the sole person forecasting the revenue. If your implementation meets any of these criteria, then you must set up sales territories and enable assignment using the Set Forecasting Options task. You can't use Setup Assistant.

Setup Overview

Forecasting can be set up in many different ways, depending on your requirements. Here are the steps for setting up forecasting two representative forecasting scenarios to give you an idea of how forecasting works. Forecasting is available only in the CX Sales UI.

Before you start review the topic *What are some common opportunity forecasting scenarios?*.

Step	Description	Navigation	Where to Get More Details
1	If your implementation fits the second scenario (you use sales territories for assignment), you enable Forecasting by clicking Submit on the Select Forecasting Options page.	**Setup and Maintenance** > **Sales** > **Sales Forecasting** > **Select Forecasting Options**	See the topic: *Enable Forecasting If You Use Sales Territories for Assignment*
2	Enabling Forecasting using either method creates quarterly forecasts for the next year and monthly forecast submission windows for each. The forecast submission windows are created automatically, without accounting for the different number of days in each month, weekends, or holidays. For these reasons, you may need to adjust the starting and ending dates of each window to conform to your company's schedule.	**Setup and Maintenance** > **Sales** > **Sales Forecasting** > **Select Forecasting Options**	See the topic: *How can I adjust forecasting windows and set forecasting options?*
3	You can change other forecasting options on the same page: • Increase the number of quarters you can forecast at the same time. • Specify criteria for including opportunities in the forecast. • Set the number of levels of the sales catalog hierarchy managers can adjust forecasts by product revenue. • Display a different chart on the Forecasts landing page. • Hide the Products tab on the forecast page to disable	**Setup and Maintenance** > **Sales** > **Sales Forecasting** > **Select Forecasting Options**	See the topic: *How can I adjust forecasting windows and set forecasting options?*

Step	Description	Navigation	Where to Get More Details
	forecast adjustments by products.		
4	If you didn't hide the Products tab, permitting sales managers to adjust forecasts by product, then you should specify what kinds of adjustment types the managers can make. You don't want sales managers entering their best case forecasts, if the VP of sales isn't interested, for example. Hide the unused forecasts adjustment types by editing the ORA_ZSF_SHOW_METRICS lookup type.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Standard Lookups**	See the topic: *Specify the Types of Forecast Adjustments Sales Managers Can Use*

Related Topics

- What are some common opportunity forecasting scenarios?

How Forecasting Works and How You Can Change It

Your sales organization can start forecasting as soon as you enable forecasting using any of the available methods: the Sales Setup Assistant, the Quick Setup page, or the Select Forecasting Options task. The application automatically creates all you need to get started:

Watch video

- Quarterly forecasts for each sales territory for one year.

  Each quarterly forecast automatically includes all won opportunities and all opportunities with a win probability greater than 70 percent with close dates that fall within the quarter. Lost opportunities are never included in forecasts.
- Monthly forecast submission windows.

  During each forecast submission window, salespeople and their management adjust their forecasts and submit them up the management hierarchy.

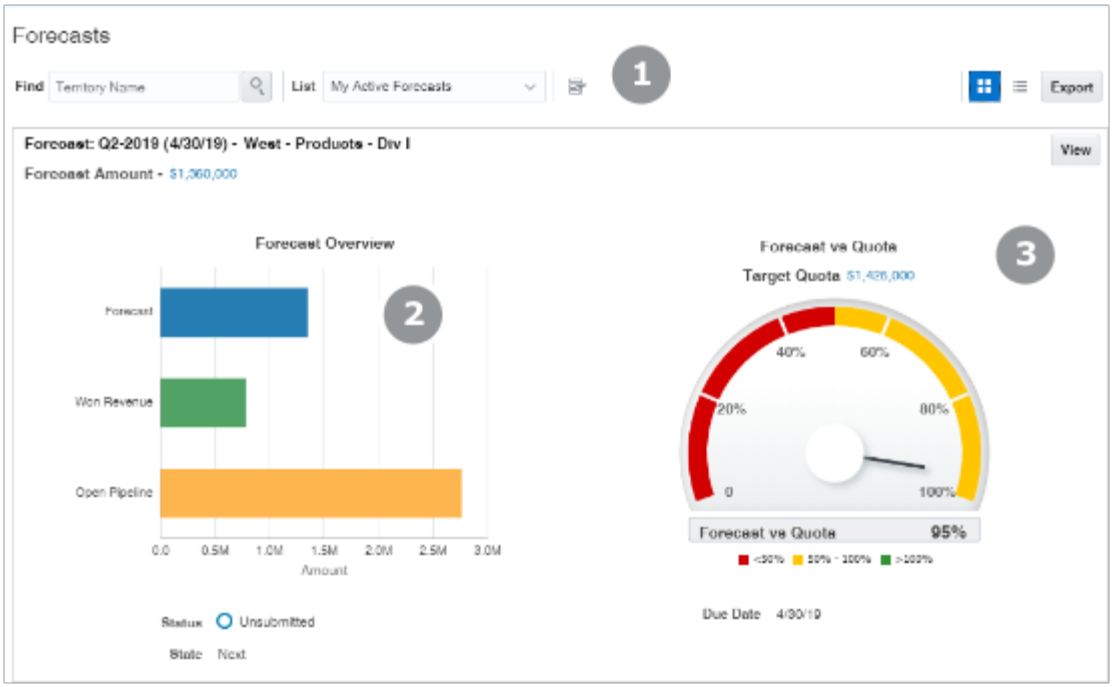
How It Works

Sometimes forecasting sales isn't much better than gazing into a crystal ball. Forecasting depends on the accuracy of your pipeline data, and that's a problem. Sales prospects often lie about what they want to purchase to gain a better bargaining position. Salespeople get lazy about entering deals or they withhold information because they're scared others will steal their hot prospects. Your sales application can't make anyone truthful, but it does provide a structured process that encourages salespeople to enter what they know, and holds them accountable. Each month, salespeople

submit their quarterly forecasts to their managers. The managers review the forecasts, adjust the forecast amounts, if necessary, and submit them up the management chain. Your organization gets a historical record of the monthly forecasts that lets you evaluate how well you're doing. Here's how the process works as delivered:

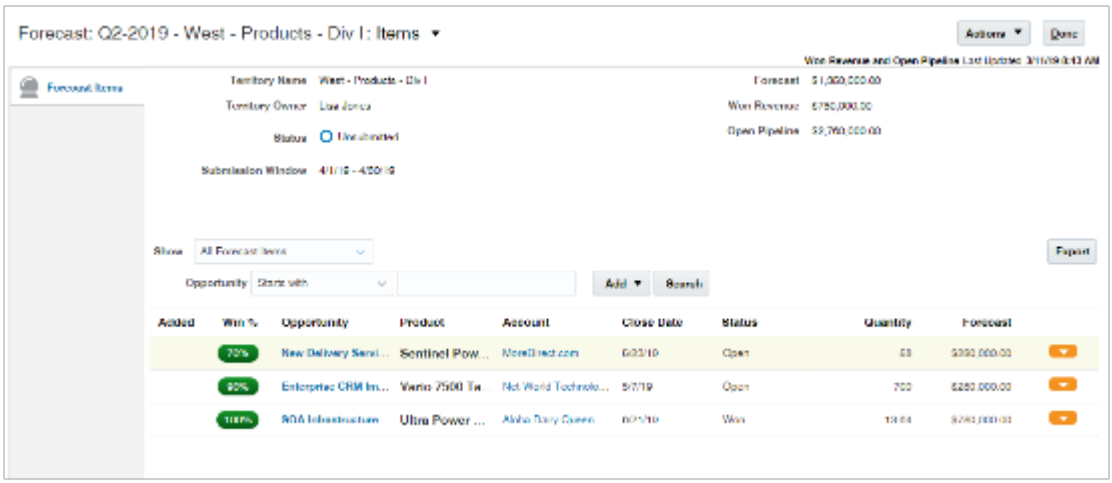
1. Salespeople review their pipeline and their forecasts.

   The Forecasts work area displays a dashboard with a summary of revenue forecasts by territory and quarter. The forecasts are compiled automatically from all won opportunities with close dates in the quarter, and those with 70 percent or greater win probability. Salespeople choose the territory they want to view (callout 1 in the screenshot). A bar chart shows the amounts for the forecasts, won revenue, and open pipeline (callout 2). By default, a second summary chart displays a bar chart that shows forecasts by time period. If you use quotas, you can instead display a visual indicator showing in percentage of quota attainment with a numeric summary (callout 3). The page also indicates if the forecast is submitted, how it was changed, and how much pipeline remains to be submitted.



2. Salespeople can review the list of opportunities included in the forecast and drill down to edit the opportunities. Their changes are automatically reflected in the forecast by the Refresh Forecast process.

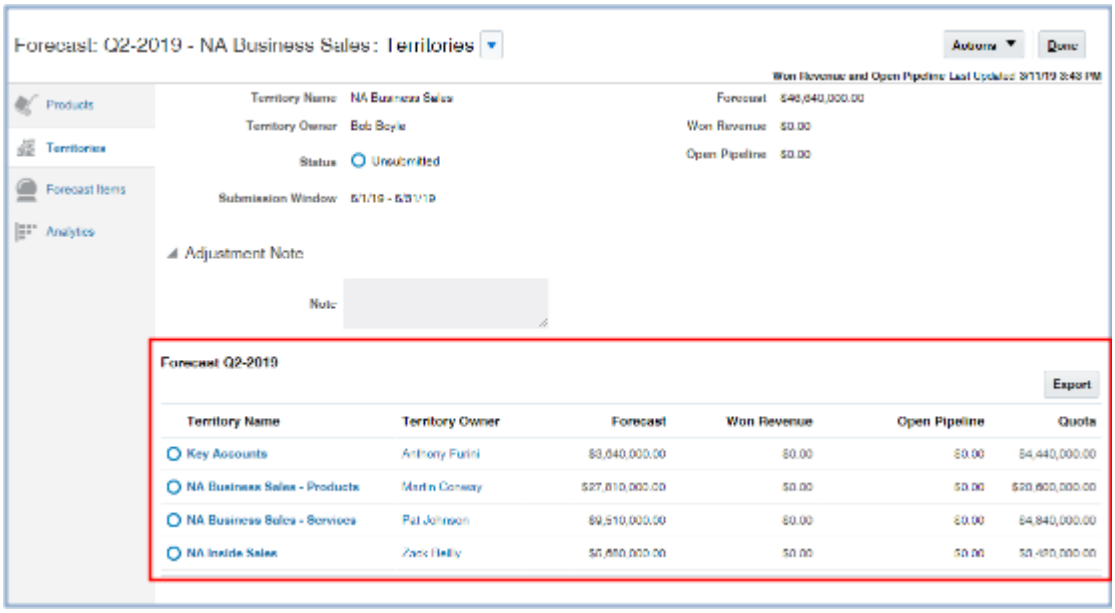
   Here's a screenshot of the Review Sales Forecast page. The page summarizes the forecast amounts, the forecast window dates, won revenue, and open pipeline.



3. While editing opportunities, salespeople can manually exclude or include opportunities from the forecast by altering the win probability and the close date.
4. Each month includes a monthly forecast submission window. The submission windows typically start after a monthly sales call. During the monthly submission window, territory changes are frozen, and salespeople can submit their forecasts for review by their managers.
5. When they review forecasts, managers see a dashboard that's very similar to what salespeople see. The dashboard summarizes the forecast revenue for the quarter, and makes it possible to compare the forecast with won revenue and the pipeline. But, instead of summarizing individual opportunities for the quarter, the manager dashboard summarizes the forecasts of all the territories in the territory hierarchy below the territory

the manager selected. Managers can view at a glance which subordinates submitted their forecasts and the trend of the latest updates.

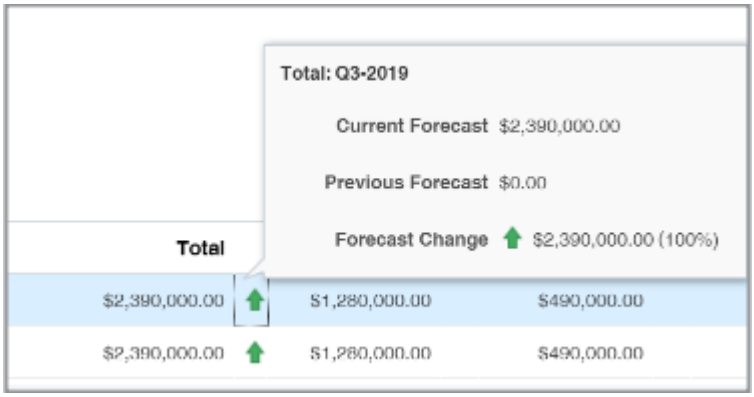
Here's a screenshot of the forecast detail managers see. The highlighted table lists the forecasts for the territories under the manager's territory in the sales territory hierarchy.



6. Managers can drill down into their subordinates' forecasts to see the details. After their subordinates submit their forecasts, managers can adjust them, and submit their own forecast up the management hierarchy. Sometimes managers know a deal is coming that a salesperson hasn't entered properly, so adjusting forecasts gives those higher up in the management chain a more accurate picture of what's happening in the pipeline. Managers can adjust the individual opportunities on the Forecast Items tab, or they can make adjustments by products (Products tab).

   There are multiple ways available for managers to adjust their forecasts. They can adjust the forecast amounts or change the product quantities. And they can enter their best-case and worst-case forecast estimates.

   Managers can drill down into forecasts to see who adjusted what and when. The changes in forecasts are also indicated by icons. Hovering over an icon displays details about the change. Here's a screenshot of a portion of a forecast. An up arrow indicates the forecast has increased since the last time the forecast was submitted. Hovering on the icon displays the details.



About Forecast Submission Windows and How You Adjust Them

By default, the application automatically generates the quarterly forecast periods and forecast submission windows for each month for one year.

- Each quarterly forecast starts on the **Start Date** and ends on the **End Date**.
- There are nine rows in the table. Each row represents a monthly forecast submission window.
- There are three monthly forecast submission windows for each quarter.
- Each forecast submission window starts on the **Territory Freeze Date** and ends on the **Due Date**.

  During the submission window, salespeople and managers get to submit and adjust their forecasts. The application continues to update the forecasts automatically if new opportunities meet the inclusion criteria you set. The application doesn't allow any territory changes during the submission window.

The application uses the default parameters entered in the Forecast Period Parameters region of the Select Forecasting Options page to generate the windows. By default, each submission window starts on the first day of the month and ends on the last day of the month. Salespeople and managers can submit their forecasts at any time.

Here's a sample schedule of the quarterly forecasts and submission windows the application generates:

Forecast Name	Start Date	End Date	Territory Freeze Date	Due Date
Q2-2019 -2019/04/30	4/1/2019	6/30/2019	4/1/2019	4/30/2019
Q2-2019 -2019/05/31	4/1/2019	6/30/2019	5/1/2019	5/31/2019
Q2-2019 -2019/06/30	4/1/2019	6/30/2019	6/1/2019	6/30/2019
Q3-2019 -2019/07/31	7/1/2019	9/30/2019	7/1/2019	7/31/2019
Q3-2019 -2019/08/31	7/1/2019	9/30/2019	8/1/2019	8/31/2019
Q3-2019 -2019/09/30	7/1/2019	9/30/2019	9/1/2019	9/30/2019
Q4-2019 -10/31/2019	10/1/2019	12/31/2019	10/1/2019	10/31/2019
Q4-2019 -11/30/2019	10/1/2019	12/31/2019	11/1/2019	11/30/2019
Q4-2019 -12/31/2019	10/1/2019	12/31/2019	12/1/2019	12/31/2019

The application automatically generates new submission windows at the end of each quarter, so there's always a year's worth of submission windows. Your organization can modify the start and end dates of each submission window by entering new dates in the **Territory Freeze Date** and **Due Date** fields. If you do adjust the dates, then you must continue to adjust these dates as the new quarters get generated.

Here's how forecasting works before each territory freeze date:

- The application compiles the forecast from opportunities that meet the forecast criteria.
- Salespeople and managers can't submit their forecasts or adjust them. All changes are made by editing the opportunities themselves.
- Changes to the territory and sales catalog product hierarchy are automatically synchronized to the forecast.
- Salespeople and managers can change the opportunity lines and the changes are automatically reflected in the forecasts.

Here's what happens after each freeze date:

- Salespeople and managers can edit, adjust, and submit forecasts for review up the management chain.
- Territories are frozen. Any changes to territories and product hierarchy aren't reflected in the forecasts.
- Changes to revenue items are synchronized to forecast items.
- Salespeople can adjust and submit their forecast between the Territory Freeze Date and the Due Date.

After salespeople submit their forecasts, their managers can review and adjust them. Salespeople can change and resubmit their forecasts until managers submit theirs. After the due date is reached, each forecast becomes read-only and can't be adjusted any more.

How You Change How Many Quarters You Can Forecast At the Same Time

By default, you can only forecast one quarter at a time. However, you can forecast two or three quarters at the same time. Just enter a 2 or a 3 in the Number of Concurrent Forecasts field in the Forecast Period Parameters section of the Select Forecasting Options page and regenerate the forecast submission windows.

How You Can Change What's Included in Forecasts

By default, the application automatically includes in each forecast all won opportunities and opportunities with a win probability greater than or equal to 70 percent with close dates that fall within the forecast period. Only sales territories that have the Forecast Participation attribute set to revenue can participate in forecasts.

What You Can Change	How
Change the win probability required to automatically include an opportunity in the forecast.	On the Select Forecasting Options page, Unadjusted Forecast Criteria section, specify a different probability.
You can let salespeople override the automatic criteria and decide what opportunities to include in forecasts.	On the Select Forecasting Options page, Unadjusted Forecast Criteria section, select the Enable Forecast Criteria Override option in the Select Forecasting Options page, Unadjusted Forecast Criteria section.
Prevent opportunities from getting left out of forecasts when salespeople forget to enter a close date and win probability.	You can set up your sales method to ensure that opportunities aren't left out because of incomplete data entries. For example, you can make entries in the Win Probability and Close Date fields required for the later stages of the sales process and you can have the application automatically prefill the win probabilities themselves when salespeople move an opportunity to a particular sales stage. You can also set up your sales method so that a particular sales stage defaults a win probability that

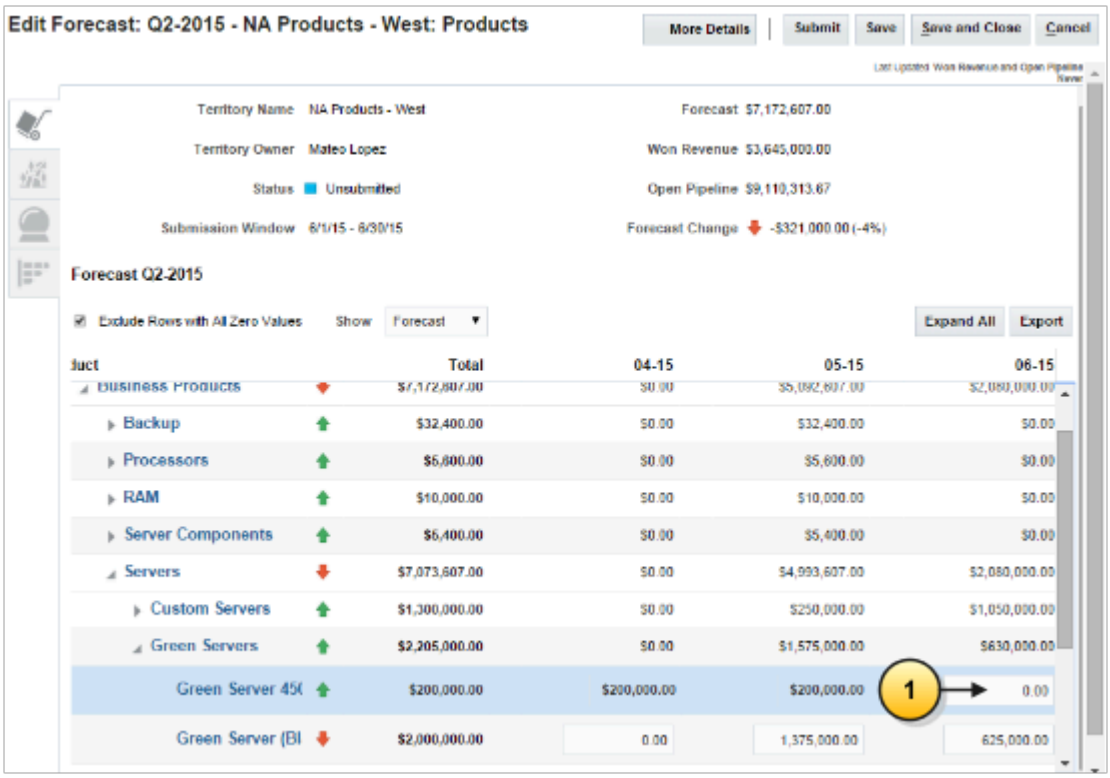
What You Can Change	How
Make sure that an opportunity at a particular sales stage gets included in forecasts.	When setting up your sales method, you can specify a default win probability. By entering a default of 70 percent for opportunities in the Agreement sales stage, for example, you ensure that all opportunities in the Agreement stage are included unless sales representatives change the win probability manually.
You can enable forecasting on individual line items separately.	By default, the win probability and close date are set for the whole opportunity. To forecast individual revenue lines, you can expose the Win Probability field for the lines in the Edit Opportunity page using Application Composer. See the Implementing Sales guide for details on this and other advanced features.

Forecast Adjustment Options

By default, managers can adjust the submitted forecast revenue by opportunities on the Forecast Items tab and by products on the Products tab of the Edit Forecast page. Adjustments on the Products tab are especially handy when sales managers want to forecast products that aren't yet entered as part of an opportunity.

- You can specify the level of granularity for the product adjustments. For example, you can enable adjustments just for broad groups of products, or down to the individual product. By default, the application enables adjustments two levels down from the sales catalog root. The adjustments that managers make are visible to their own managers after they submit the forecasts.

  Here's a screenshot of the Products tab on the Edit Forecast page. The page shows a sample sales catalog hierarchy, which extends four-levels down to the individual product. Callout 1 highlights a product forecast line selected for adjustment.



- If you don't want managers to adjust forecasts by products, you can remove the tab entirely by deselecting the Enable Product Totals option in the Product Tab section of the Select Forecasting Options page.

Enable Forecasting If You Use Sales Territories for Assignment

Here's how to enable forecasting if you set up sales territories to assign opportunities by geography, product, or other dimensions.

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Forecasting
    - Task: Select Forecasting Options
2. Select **Enable Forecasting**.
3. Click **Submit**.

    The application runs a background process to generate your forecast windows and forecasts using the application's default option settings. The application generates quarterly forecasts for one year with a forecast submission window each month. After the process completes, your sales organization can start reviewing your forecasts right away. You can also change the forecasting defaults on the Select Forecasting Options page.

Overview of the Sales Forecasting Options Page

The Select Forecasting Options page is the Swiss Army knife in your forecasting setup, so it's worth getting an overview of the tools at your disposal. Here's an overview of the different page sections and what you can use them for.

Section Name	Overview
Forecast Period Parameters	The application generates the forecast submission windows using the default parameters entered in this section when you enable forecasting and at the end of every quarter. The generated submission windows are displayed in the Scheduled Forecasts section where you can adjust them to conform with your actual forecasting schedule. The automatically generated submission windows are approximations only, so you must adjust the dates manually. You can also enter different parameters to generate entirely different set of submission windows.
Unadjusted Forecast Criteria	Here you specify the win probability the application uses to determine which opportunities to include in the forecast. You can also permit salespeople to include any opportunity they want.

Section Name	Overview
Product Tab	Selecting the Enable Product Totals displays the Products tab on the Edit Forecasts page. Sales managers use the tab to adjust forecasts by product group rather than by territories. Deselect Enable Product Totals to enable adjustments by territories only.
Metrics	All forecasting metrics are enabled automatically, but you can use this section to change what chart is displayed in the Forecasts landing page. If you want to enable the display of the chart comparing forecasts to quotas, select the Quota option and disable the Enable Forecast Trend Graph option in Additional Settings. You can ignore the other options. They aren't used any more.
Additional Settings	Use this section to enable the forecast trend graph as the second chart on the Forecasts landing page, and to make it possible for managers to enter notes about their forecast adjustments.
Scheduled Forecasts	The application displays the generated forecast submission windows in this section. You must manually adjust the dates of each submission window.

How can I adjust forecasting windows and set forecasting options?

You can adjust the monthly forecast submission windows the application generated, change the criteria for including opportunities in forecasts, and set other forecasting options.

After you navigate to the Select Forecasting page, you can:

- Adjust the forecast submission windows.
- Set forecasting criteria.
- Specify the granularity of product adjustments or disable adjustment by product entirely.
- Change the chart on the landing page and turn on adjustment notes.

Navigate to the Select Forecasting Options Page

Open the task **Select Forecasting Options** from the Setup and Maintenance work area:

- Offering: Sales
- Functional Area: Sales Forecasting
- Task: Select Forecasting Options

Adjust the Forecast Submission Windows

The application generates the monthly forecast submission windows using the parameters specified in the Scheduled Forecasts section.

1. Review and adjust the monthly forecast submission windows the application generated in the Scheduled Forecasts section of the page. Each window starts on the **Territory Freeze Date** and ends on the **Due Date**.

2. If you want to specify a different set of forecasting periods or want to forecast more than one quarter at a time, you can enter different parameters in the Forecast Period Parameters section. You must then regenerate the scheduled forecasts and submission windows by clicking **Submit**. Here's an explanation of the fields in this section:

Field	Explanation	Provided and Suggested Values
Forecast Period	Typically a quarter. Each forecast includes only those opportunities set to close in the forecast period.	**Quarter**
Adjustment Period	This read-only field displays the type of period you selected when you set up your accounting calendar. Typically, this is a month.	You can't edit this field.
Forecast Frequency	Enter the number of submission windows you want to generate for each forecast period.	Because you are holding a forecasting call each month and there are three months in each quarter, the value is `3`.
First Forecast Due Date	The date you want the first submission window to end relative to the forecast period. The application takes the forecast snapshot at the end of the day.	The **First Forecast Due Date** has the default value of `31` and the **After the forecast period start date** option is selected. These settings create the first forecast submission window, which ends on the last day of the first month in each quarter. The application generates the subsequent submission windows based on the number of days you enter here and in the **Territory Freeze Date** field.
Territory Freeze Date	The number of days before the end date when you want the submission window to start. Any sales territory changes after this freeze date are ignored and applied only to subsequent forecasting windows.	For the forecast submission windows to start at the beginning of each month, the number provided is `31`.
Number of Concurrent Forecasts	Specified how many quarters you can submit forecast for at the same time.	The default value is **1**, so by default, you can forecast only one quarter at a time. Entering a **2** or a **3**, makes it possible for you to submit and adjust forecasts for two or three quarters every month.

Field	Explanation	Provided and Suggested Values
Number of Scheduled Periods	The number of forecast periods you want to view. Managers can only adjust the forecast for the current period during the submission windows you generated, but you can view the forecasts for subsequent periods.	The number of forecast periods is set to `4` (four quarters) for the whole year. You can change the number of forecast periods.

3. If you modified forecast period options, then click **Submit**.

   The application runs a process to regenerate the forecasting periods and updates your forecasts. The Select Forecasting Options page is unavailable until the processes completes. When the process completes, the generated submission windows appear in the Scheduled Forecasts region.
4. Click **Submit** when you are done.
5. The application automatically generates new submission windows at the end of each quarter. You must continue to manually adjust these windows as they are generated.

Set Forecasting Criteria

The application includes in a quarterly forecast any opportunities that close within the quarter and match the forecast criteria you set in this section.

1. By default, the application includes opportunities with a win probability greater than or equal to 70 percent. You can change the probability to include or exclude more opportunities. It's a good idea to specify a probability that matches the default probability of the appropriate sales stage in your sales method.

   > **Note:** By default, the win probability is set at the opportunity level. To forecast at the level of individual revenue lines, you can expose the win probabilities for the lines in the Edit Opportunity page using Application Composer.

2. Selecting the **Enable Forecast Criteria Override** option makes it possible for salespeople or their managers to include or exclude an opportunity from a forecast while editing regardless of its win probability. If you select the option, then salespeople can make a selection from the Include in Forecast list while editing an opportunity.
3. Select the **Enable nonrevenue forecasting** option if you want to generate separate forecasts for overlay territories.

Specify the Granularity of Product Adjustments or Disable Adjustment by Product Entirely

By default, sales managers see the Products tab on the Forecasts page and can adjust forecasts by product. You can make these changes:

- Specify number of sales catalog levels sales managers can adjust in the **Product Hierarchy Depth** field. By default, managers can adjust product groups up to two levels below the catalog root.
- Hide the Products tab and disable adjustments by product entirely, by deselecting the **Enable Product Totals** option.

Change the Chart on the Landing Page and Turn on Adjustment Notes

The Forecasts landing page displays a Forecast Overview chart that compares your forecast with won revenue and open pipeline. It also displays a second bar chart that shows your forecast by time periods. You can replace the second chart with a chart comparing the forecast and quotas. You can also enable managers to add notes about their forecast adjustments.

- To display the forecast to quota comparison chart instead of the forecast by time periods bar chart, make these selections:
    - In the Metrics section of the Select Forecasting Options page, select the **Quota** option.
    - In the Additional settings section, deselect the **Enable Forecast Trend Graph** option.
- If you want to enable sales managers to add notes when they adjust forecasts, select the **Enable Adjustment Notes** option in the Additional Settings section. Sales managers can add adjustment notes for each forecast item. They can also create and edit a single adjustment note for summary territory adjustments or a note for summary product adjustments.

Specify the Types of Forecast Adjustments Sales Managers Can Use

Sales managers can adjust forecasts on the Products tab in a number of ways. They can adjust the revenue totals for products or groups of products, or they can adjust the product quantities, for example.

A salesperson didn't get around to entering the potential sale of 20 Green Servers? No problem! The manager can add the servers to the forecast without creating an opportunity. Managers can also enter their best case and worst-case forecast scenarios. All of the adjustments and scenarios get passed up the management chain. You should decide which forecast adjustment types you want to use in your sales organization and disable the rest. There's no point for managers to enter the best-case or worst-case scenarios if their management doesn't view them.

Available Forecast Adjustment Types

Managers select the adjustment type they want to use from the Show list on the Product tab. Here are the available adjustment types:

- Forecast

  Managers can adjust the revenue for products or product groups for each forecast submission window. And they can even enter revenue for products that aren't associated with any opportunities. These revenue adjustments get reflected in the forecast landing page charts.
- Best Case

  Managers can use this forecast to enter their best-case scenario numbers. You can also make it possible for sales managers to view the best case or worst case forecast totals on the Forecasts landing page. You must expose the Best Case and Worst Case fields on the landing page layout using Application Composer. Some Oracle customers also write Groovy scripts to automatically enter the sum of submitted and potential sales.

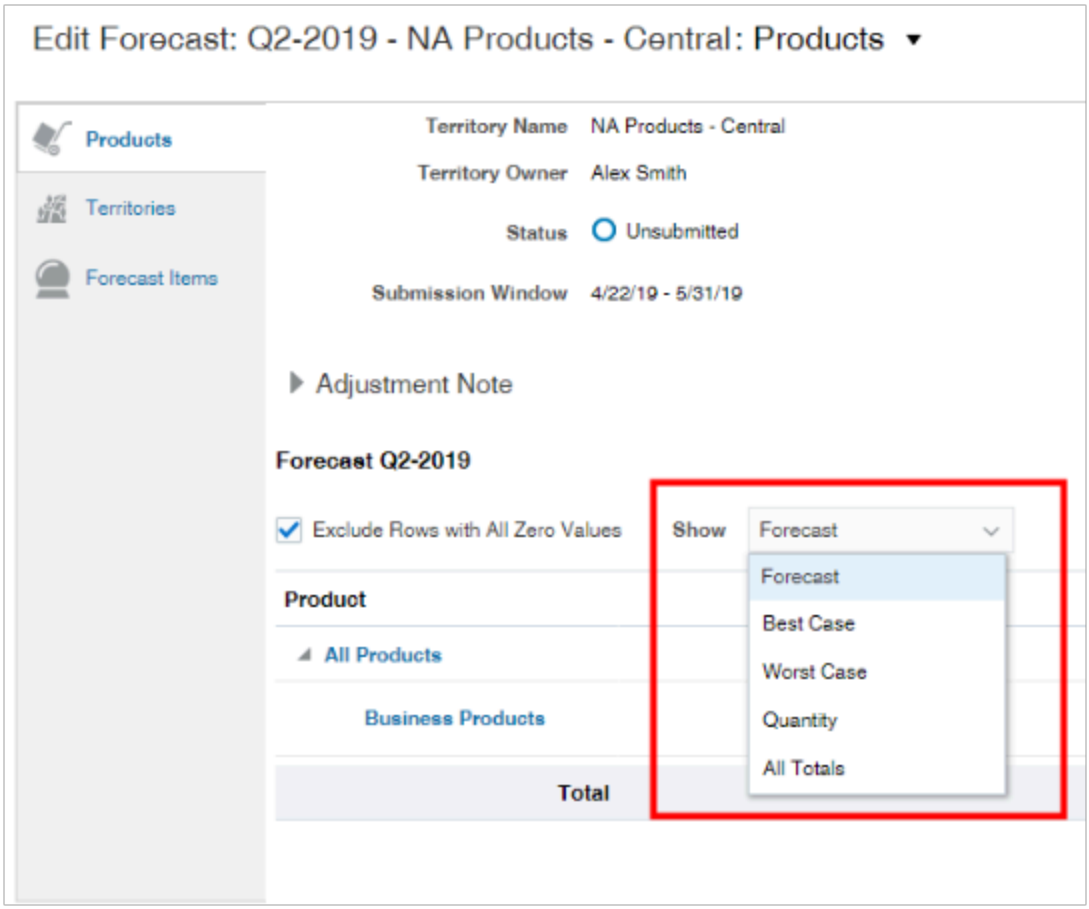
- Worst Case

  Managers can use this forecast to indicate their best case scenario numbers. A Groovy script you create could automatically enter the submitted opportunity numbers.
- Quantity

  Makes it possible to forecast and adjust forecasts by product quantity. This is the only adjustment type not displayed in the list by default.
- All Totals

  Displays a table summarizing the totals for all the different forecast adjustment types. Here managers can update the total revenue forecast for the quarter, rather than updating the individual monthly numbers on the Forecast selection.

Here's a screenshot of the Products tab highlighting the Show list:



Specify What Adjustment Types Managers Can Use

Here's how to specify which adjustment types sales managers can use:

1. Open the task **Manage Standard Lookups** from the Setup and Maintenance work area:
   - Offering: Sales
   - Functional Area: Sales Foundation

- Show: All Tasks
- Task: Manage Standard Lookups

2. On the Manage Standard Lookups page, search for the lookup type **ORA_ZSF_SHOW_METRICS** or the meaning **Forecast metric options**.
3. Highlight the row containing this lookup type.
4. In the Lookup Codes region, make sure **Enabled** is selected only for the forecast adjustments you want to use.
5. Click **Save and Close**.

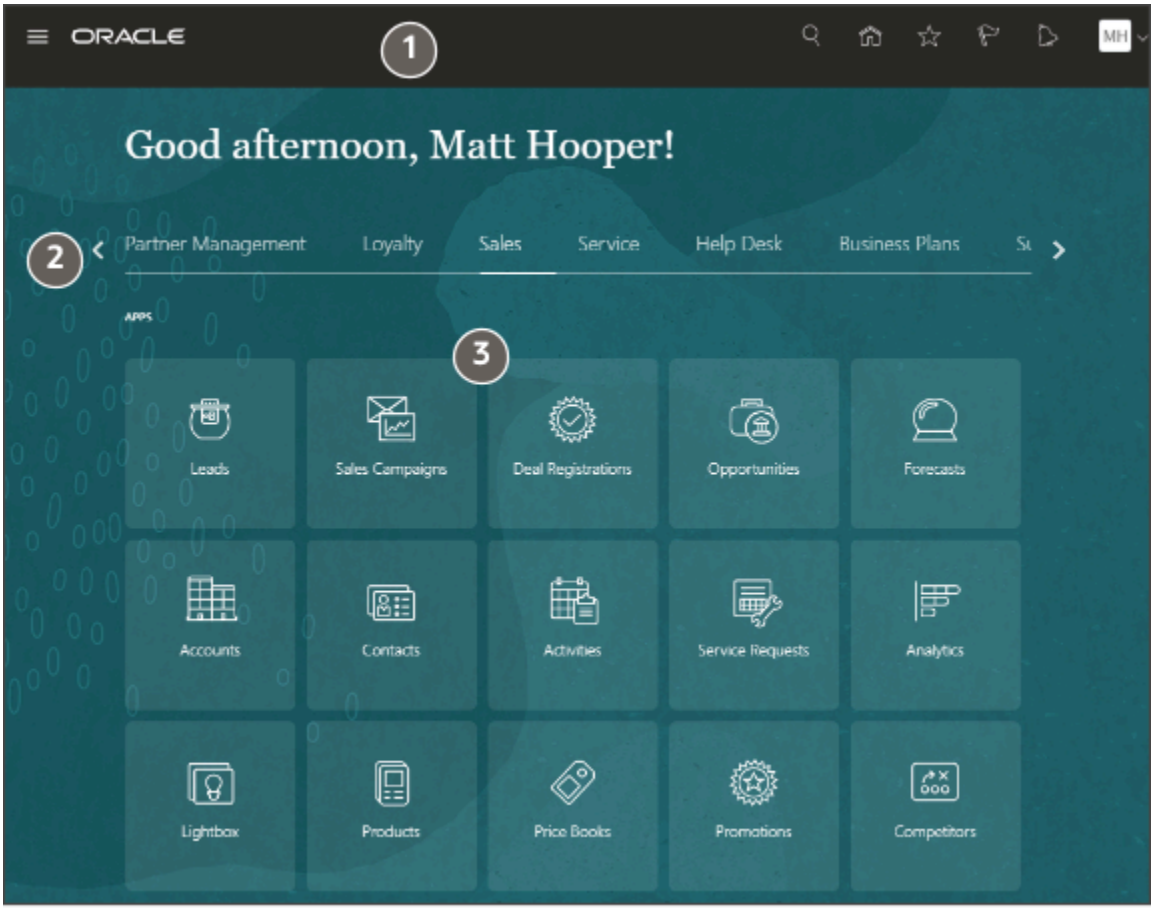
27 Configure the Navigator and Home Page

A Single Page for All Your Sales Activities

In the default home page design provided by Oracle, salespeople can access both the different work areas they need as well as the reports and analytics that highlight key sales information. Here's a brief description of the home page sections. You can configure the different sections and even hide some, but you can't change their order on the page. The home page is shared both by Digital Sales and CX Sales.

Global Toolbar and Springboard with Navigation Icons

Callout Number	Region	Description
1	Global region with toolbar.	The toolbar includes icons to open the Navigator, Home page, and the Settings and Actions menu, among others. The toolbar, described in a separate topic, is available on all pages.
2	Tabs that group navigation icons.	Which tabs users see depends primarily on their security privileges. Because setup users have broad privileges, you see many more tabs than sales users. For example, sales users never see the Service or Help Desk tabs, as these aren't part of CX Sales or Digital Sales. Sign in as a Sales Representative or a Sales Manager to get an idea of how the application is set up by default for each user. Using the Structure tool, you can rename the tabs, hide them, change heir order, and move their contents. The tabs correspond to the groupings you see in the Navigator, but you can choose to display only a subset of what's available in the Navigator.
3	Navigation icons within the tab you selected. This region is called the springboard.	Navigation icons within the tab you selected. The navigation icons correspond to the selections you see in the Navigator.



Things to Finish and News

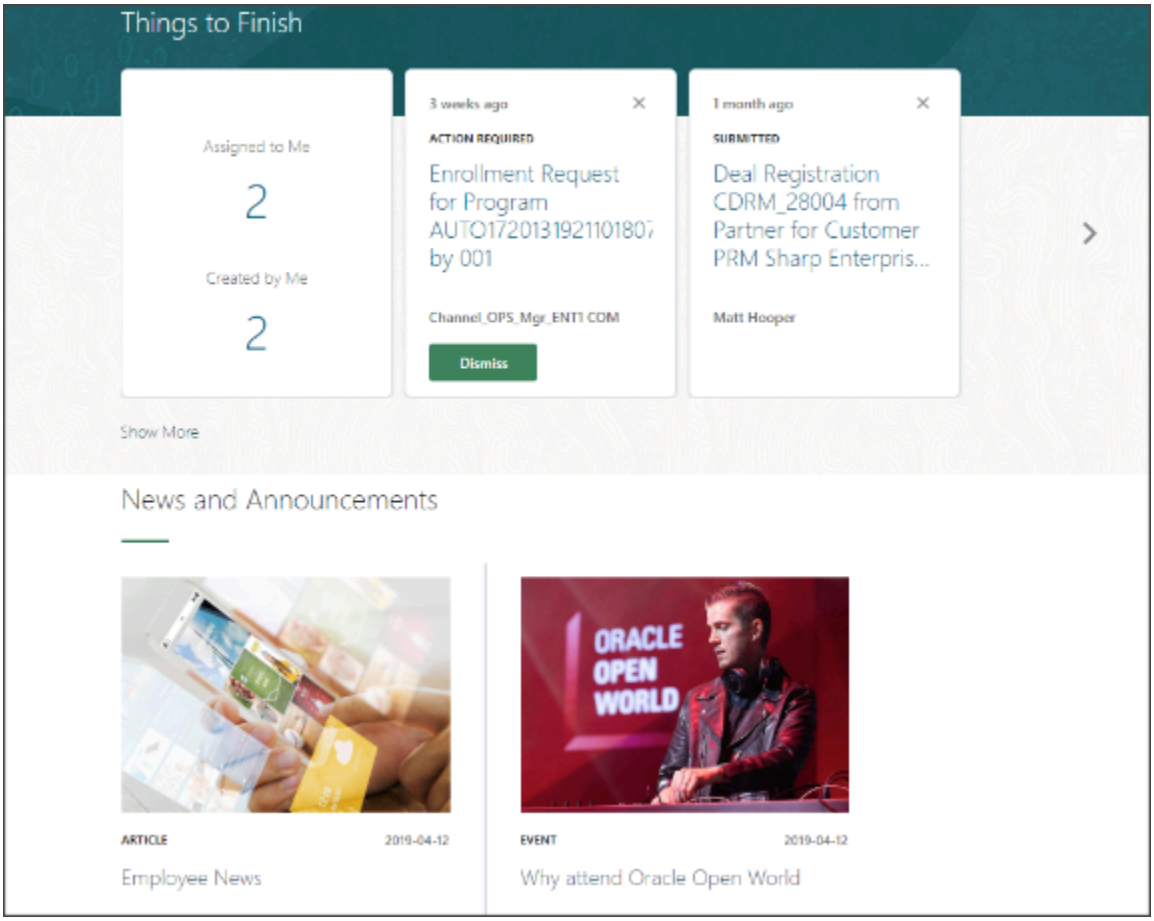
The middle of the page includes two regions that you can hide during setup:

- Things to Finish

  Displays the same notifications you can view using **Notifications** (bell icon) in the global toolbar.

- News and Announcements

  You can create company-wide announcements as described in the topic Create and Enable an Announcement in the Oracle Applications Cloud Implementing Applications guide.



Analytics and Key CX Sales Information Displayed in Infolets

The Analytics section displays tabs grouping infolets. Infolets are containers that display key sales information in CX Sales. In Digital Sales you display the information in the Sales Dashboard instead.

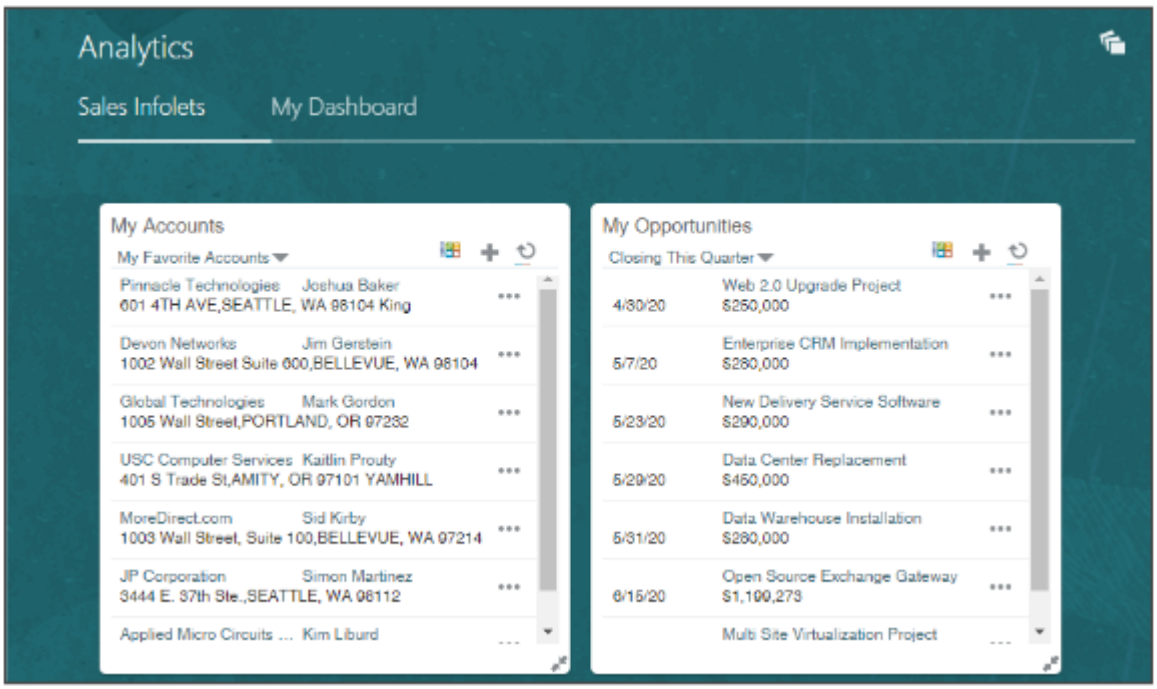
You can display different infolets for different job roles in the organizations and salespeople can configure what information they want to see on their own page.

There are two types of infolets you can display:

- Infolets with business intelligence reports provided by Oracle or those you create in Oracle Business Intelligence Answers (BI).

- Workspace infolets that summarize sales information and make it possible to take action on individual items without drilling down into individual records.

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



> **Note:** By default, your application displays an older type of infolet, called actionable infolet, rather than the Workspace infolets. As described in this chapter, new customers should switch to using Workspace infolets because they're designed to work with Workspace. Actionable infolets are designed to work with individual work areas and the saved searches created in them.

Related Topics

- Workspace Infolets

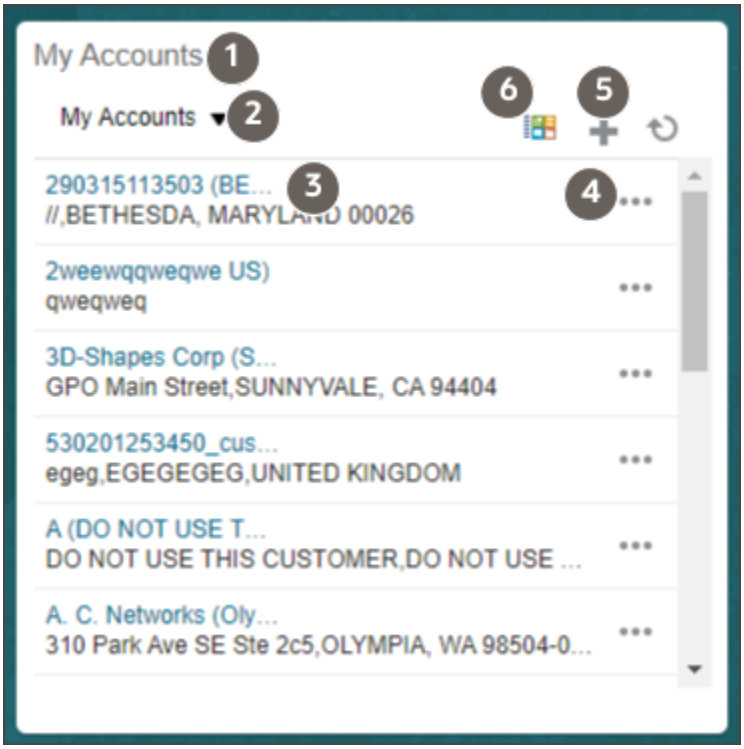
Workspace Infolets

Workspace infolets summarize key sales information in the Sales Infolet tab in the Analytics section at the bottom of the home page. Workspace infolets are used in CX Sales. They provide salespeople with many of the features they use in Workspace, such as quick actions and filters.

For example, from within the My Accounts Workspace infolet, salespeople can take notes, log calls, schedule appointments, and even create opportunities for a specific account in the list. They can also create accounts directly from the infolet. Here's a screenshot of the My Accounts infolet provided by Oracle:

Callout Number	Function	What You Can Configure
1	Infolet title.	Edit the title.

Callout Number	Function	What You Can Configure
2	Select a Workspace saved search as a filter.	Specify which Workspace saved searches are available as filters.
3	Review basic information about accounts and drill down to edit	You can specify which fields display in each record in the list.
4	Take actions on an account without drilling down. On an account, you can take notes, log calls, and even create opportunities.	You can enable, disable, or reorder the smart actions using Application Composer.
5	Create new accounts.	N/A
6	Navigate to Workspace.	N/A



Oracle provides you with 10 Workspace infolets. Six are preconfigured and four blank:

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

- Additional Actionable Infolet
- Additional Actionable Infolet
- Additional Actionable Infolet
- Additional Actionable Infolet

As a sales administrator or setup user, you can configure the information in each of the infolets, even those that are preconfigured. You can specify which Workspace saved searches are available as filters, change the infolet title, and decide how you want the infolet information to display. You can configure Workspace infolets to display any combination of saved searches from Workspace. Suppose, for example, that you created a project custom object to track projects involving multiple customers. You could configure one of the Workspace infolets as My Projects to track the accounts and the tasks involved.

Setup Overview

Here's an overview of the steps to configure your home page and navigation to application features.

Home Page

Here's a summary of the steps to configure your home page appearance. The home page is shared by both CX Sales and Digital Sales.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both CX Sales and Digital Sales	Create a sandbox with the Appearance tool.	**Configuration** > **Sandboxes**	See the video and topic: *Configure Home Page Appearance*
2	Both CX Sales and Digital Sales	Upload your company logo and save your new configuration.	In the sandbox, select **Tools** > **Appearance**	Covered in the same video and topic. For additional configuration options, see the Configuration of Home Page and Navigation chapter of the Oracle Applications Cloud Configuring and Extending Applications guide.
3	Both CX Sales and Digital Sales	You can remove the **Things to Finish** and the **News and Announcements** sections of the home page, by clicking **Home Page Display** (top icon in the Appearance tool) and setting **Visible** to **No**.	In the Appearance tool, click **Home Page Display**	Covered in the same video and topic.
4	Both CX Sales and Digital Sales	Publish your sandbox.	Click **Publish** in the sandbox.	Covered in the same video and topic.

Step	Applies To	Description	Navigation	Where to Get More Details

Navigation and Infolet Tabs

Here's an overview of the steps to configure navigation and specify which infolet tabs appear in the Analytics section. Infolets are important only for CX Sales.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both CX Sales and Digital Sales	Sign in as users with the different job roles you are using and review the default navigation for each to see which items you want to hide or configure. CX Sales icons appear in the Sales tab. Digital Sales icons in the Digital Sales tab.	Not applicable.	See the topic: *What Different Sales Job Roles See in the Navigator and Springboard*
2	Both CX Sales and Digital Sales	Create a sandbox with the Structure tool.	**Configuration** > **Sandboxes**	See the video and topic: *Configure Navigation*
3	Both CX Sales and Digital Sales	Specify which items salespeople see on the Navigator and which icons they see on the home page springboard and in which order. You can hide unwanted items from everyone or you can add EL Expression conditions to make them visible only to a subset of users. You can make features accessible from both the Navigator and the home page springboard, or from the Navigator only.	In the sandbox, select **Tools** > **Structure**	Covered in the same video and topic.
4	CX Sales	For CX Sales, specify which infolet tabs in the Analytics section appear and in which order. All of the Workspace infolets you need to display key sales information are available within the Sales Infolet tab, so you can hide the rest unless you need them.	In the Structure tool, click the **Home Configuration** tab.	Covered in the same topic.
5	Both CX Sales and Digital Sales	Publish your sandbox.	Click **Publish** in the sandbox.	Covered in the same topic.

Workspace Infolet Configuration

Step	Applies to	Description	Navigation	Where to Get More Details
1	CX Sales	Create and enter a sandbox with Page Composer as your tool. If you want to display different Workspace infolet configurations for different job roles, you can specify a job role.	**Configuration** > **Sandboxes**	See the topic: *Create and Enter a Sandbox with Page Composer as Your Tool*
2	CX Sales	Specify which Workspace infolets you want to expose on the page and how you want the page to look.	While in Page Composer, select each infolet you want to display from the **Infolet Repository**.	See the topic: *Specify Which Workspace Infolets Display and In What Order*
3	CX Sales	Configure the content of each Workspace infolet. You can: • Change the infolet title • Specify which Workspace saved searches salespeople can select • Choose the fields that display in each record for each saved search	While in Page Composer, open each Workspace infolet and go to **Actions** > **Configure**	See the topic:*Configure Workspace Infolets*
4	CX Sales	Remove any unused infolets from the list of infolets available for display.	While in Page Composer, open each Workspace infolet and go to **Actions** > **Edit Visibility**	Covered in the same topic.
5	CX Sales	Save your work by clicking **Close** in the Page Composer toolbar, and publish your sandbox.	Click **Close** in Page Composer and then **Publish** in the sandbox.	N/A
6	CX Sales	In Application Composer, you can enable, disable, or reorder the actions users can take for each object. This setup is optional.	**Application Composer** > **Common Setup** > **Smart Actions**	See the topic *Overview of Smart Actions* in the Configuring Applications Using Application Composer guide.

Configure Home Page Appearance

Oracle provides you with a default home page design that salespeople can use to access all of the navigation icons and key sales information they need. While you can still use alternate multipage designs that are more configurable, Oracle recommends that for CX Sales, you use the default theme and limit your configuration to uploading your logo and hiding sections of the page you don't need. You can't change the order of the sections on the page.

Watch video

1. Create and enter a sandbox with the Appearance tool enabled:
    a. In the Navigator, click **Configuration** > **Sandboxes**.
    b. Click **Create Sandbox**.
    c. Enter a sandbox name.
    d. Select **Active** for the **Appearance** tool.
    e. Click **Create and Enter**.
    f. From the sandbox **Tools** menu, select **Appearance** to enter the tool.
2. In the **Logo** field, select **File** from the list and upload your logo.

    The logo image must be saved as a .png file with a transparent background with a recommended maximum size of 200 pixels wide and 50 pixels high.
3. If you're hiding the Things to Finish and News and Announcements sections, there's no point in uploading an image using **Cover Image**. The image appears in the center of the page under these sections.
4. Remove either or both of the **Things to Finish** and **News and Announcements** sections of the page if you aren't using them. Things to Finish displays notifications you can also access from the toolbar. News and Announcements can display your company-wide announcements. Here's how to hide them:
    a. Click **Home Page Display**, the top icon on the page.
    b. Click in the **Visible** column for each section and select **No**.
5. View your new home page configuration while inside the sandbox by clicking **Home**.
6. Publish the sandbox:
    a. Click the sandbox name and select **Publish**.
    b. On the Sandbox Detail page, click **Publish**.

        You can check the progress of the publish process in the Current Status section.

Configure Navigation

The Different Factors That Determine What Users See on the Home Page

Which selections users see in the Navigator, and which icons and infolets they see on the home page depends on a number of factors:

- Security roles

  What users see in the UI is primarily determined by their security roles. For example, users you provision with any of the standard sales job roles, get to see all of the sales navigation, including Opportunities, Accounts, Leads, Contacts, and so on. But they don't see the Security Console, a feature only available to users with the IT Security Manager job role. Because users are granted the Employee abstract role, they get many human resources features on the Navigator that aren't pertinent to sales unless you're implementing Oracle HCM Cloud.

- Configuration in the Structure tool

  Use the Structure tool to fine-tune the access granted by the security roles:

  - Specify if navigation is available in the Navigator and the springboard or hidden from users. You can create, edit, and change the order of the different headings (called groups) and even create new groups.
  - Specify which sales infolet tabs appear and in which order.

  You can add conditions (EL Expressions), to display or hide specific items or groups. For example, you can remove an item from view for a specific user or a specific job role. Sales representatives have the security permissions to import accounts and contacts and monitor background processes, but you may want to leave these rather technical tasks for sales administrators. Some selections already include EL Expressions that make items visible depending on system profile option settings or only when you enable a particular functional area of an offering. You can append additional conditions to the existing expressions.

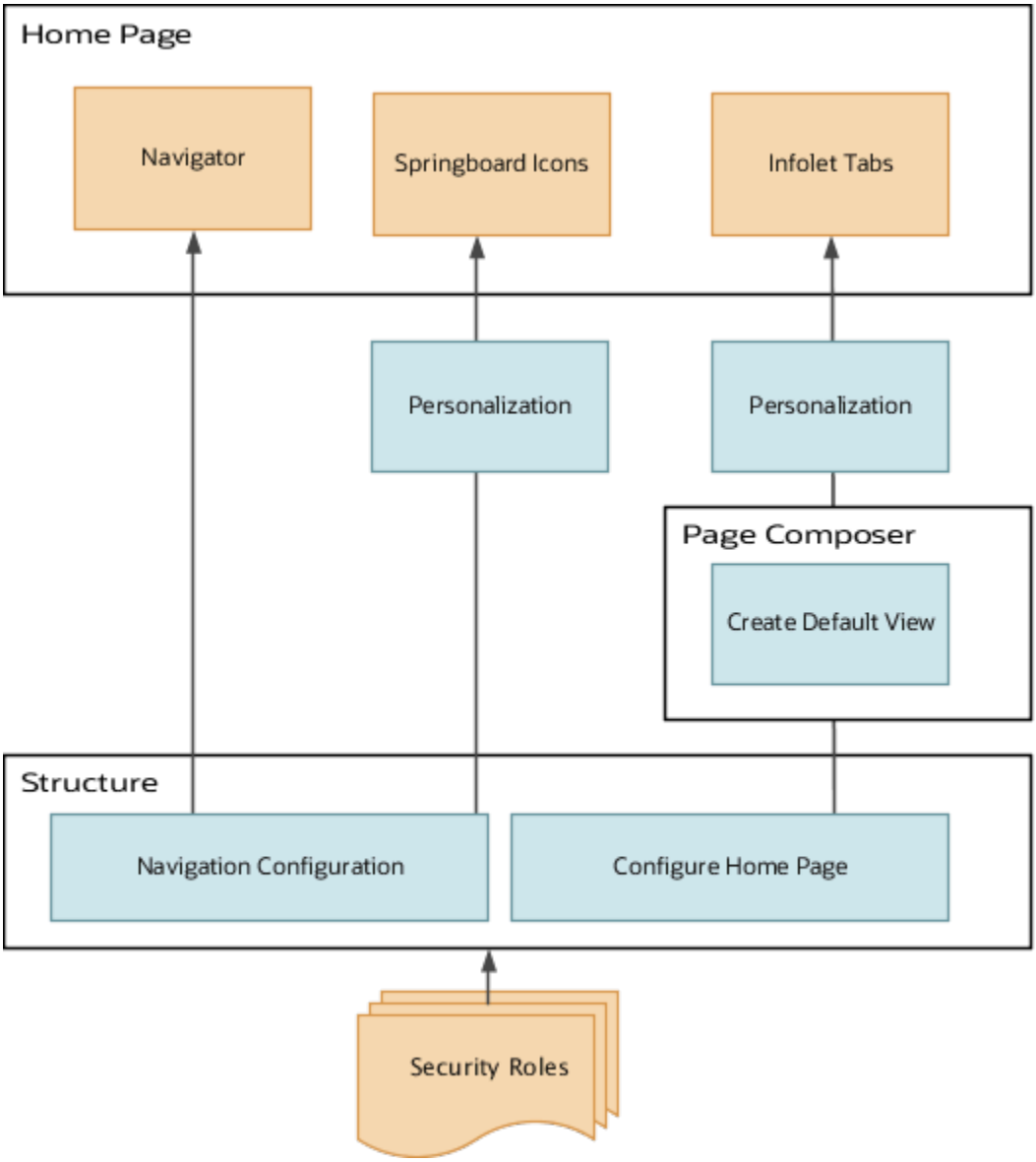
- Default infolet views you create

  Using Page Composer, you can specify which infolets appear in an infolet tab by default and in which order. Hiding an infolet doesn't remove the infolet entirely. Users can always add it back to their home page. If you want to hide infolets from users entirely, you must edit the visibility of each one. See the Enable and Configure Workspace Infolets section for details.

- Personalization

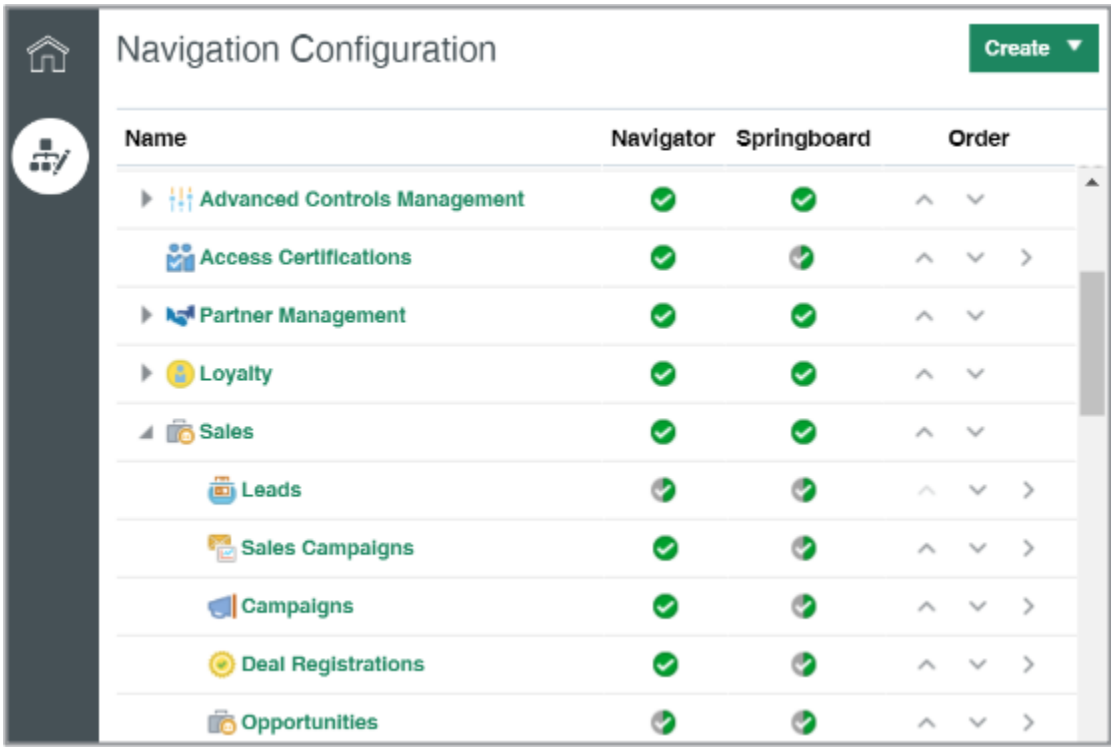
  Individual users can create their own personal views of the navigation icons they see on their springboard, but they can't change what displays on the Navigator. Users can also select the infolets they want to display and change their display order. Any personalization supersedes the default Infolet views you created.

Here's a diagram that illustrates the different factors that together determine what a user sees in the Navigator, on the springboard, and in the infolet tabs.



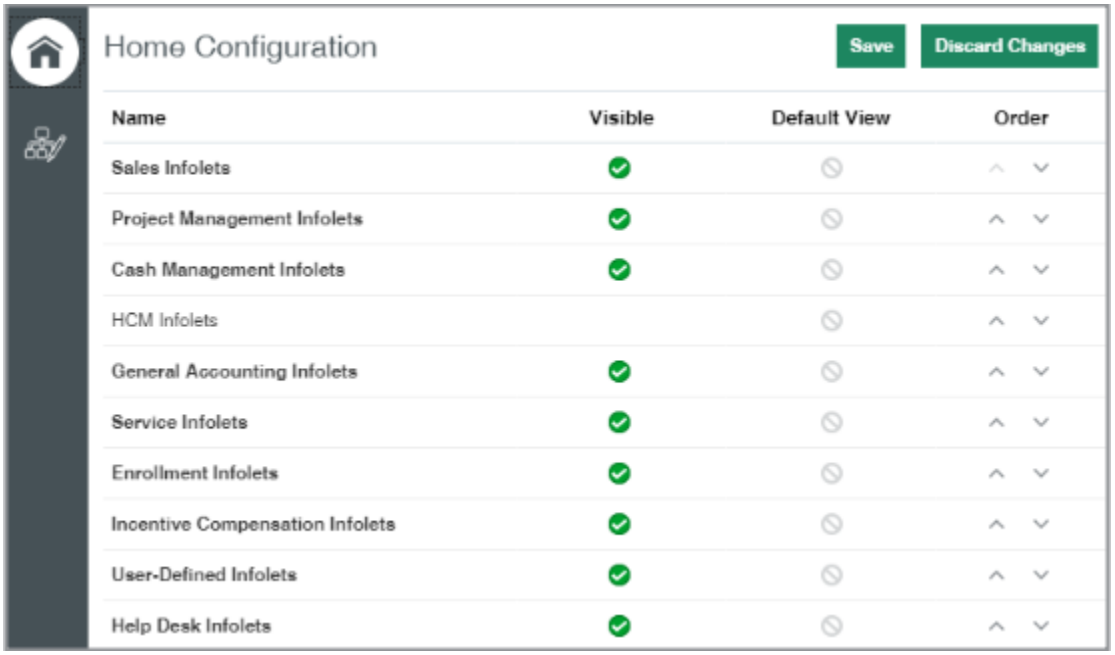
Navigation Configuration

The Navigation Configuration page displays all the feature selections available to all users of Oracle Fusion Cloud applications. It's not filtered by the security roles. So, you don't have to hide selections that are never displayed to sales users. To change the display setting and to add EL Expression conditions, you must drill down into each item.



Infolet Tab Configuration

Use the Home Configuration page in the Structure tool to specify which infolet tabs users get to see in the Analytics section of the home page. Just like the Navigation Configuration page, this page shows you the selections for all applications. You can hide, add EL Expressions, rename, and reorder.



What Different Sales Job Roles See in the Navigator and Springboard

To help you configure navigation, here's an overview of what users with common sales job roles see by default in the Navigator and springboard. The different Navigator items are grouped under headings.

The table lists all the headings, but not every item under every heading. If it makes sense to hide the whole heading, there's no need to list each item. For each of the common job roles, you learn if the item or category is displayed in both the Navigator and springboard, in the Navigator only, or in neither.

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
Me	Navigator only	Navigator only	Navigator only	Navigator only	All of the items under the Me category come from the Oracle Human Resources Cloud. Unless you're implementing HCM, remove all of the items here except Roles and Delegations. Salespeople can use Roles and Delegations to see which security roles are assigned to them, and request more, depending on your security setup.
My Team, Users and Roles	Navigator only	Navigator only	Navigator only	Navigator only	Remove. Only setup users can use Users and Roles to create and manage sales users.
Partner Management	Neither	Neither	Neither	Both	Remove unless you're using Oracle Partner Management
Sales, Leads	Both	Both	Both	Both	Sales leads work area.
Sales, Deal Registrations	Neither	Neither	Neither	Both	Remove unless you're using Oracle Partner Management
Sales, Forecasts	Both	Both	Both	Both	Sales work area where you submit, adjust, and review sales forecasts.

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
Sales, Activities	Both	Both	Both	Both	Work area where salespeople manage their calendar and tasks, log calls and emails, and other activities.
Sales, Products	Neither	Neither	Neither	Both	Create and manage products for the sales catalog, and upload product images.
Sales, Competitors	Both	Both	Both	Both	View and manage sales competitors. Sales Administrators can create competitors. The other sales roles can only view them.
Sales, Opportunities	Both	Both	Both	Both	Work area for managing sales opportunities.
Sales, Accounts	Both	Both	Both	Both	Work area salespeople use to manage their accounts.
Sales, Analytics	Both	Both	Both	Both	Central work area for viewing BI reports.
Sales, Price Books	Neither	Neither	Neither	Both	Price the products you're selling and to offer discounts.
Sales, Territories	Neither	Navigator only	Both	Both	Sales territory management for Sales Managers and Sales Administrators.
Sales, Campaigns	Navigator only	Both	Neither	Navigator only	Marketing campaign information from Oracle Marketing Cloud. Remove unless you're implementing integration with Oracle Marketing Cloud (Eloqua).

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
Sales, Quotes and Orders	Navigator only	Navigator only	Navigator only	Navigator only	Remove unless you're implementing integration with Oracle Configure, Price, and Quote (CPQ) Cloud.
Sales, Contacts	Both	Both	Both	Both	Sales contacts work area.
Sales, Recommendations	Neither	Both	Both	Both	Remove. No longer used.
Sales, Lightbox	Both	Both	Both	Both	Enables salespeople to share and collaborate on presentations.
Sales, Promotions	Neither	Neither	Neither	Both	Sales administrators can create promotions to offer discounts.
Sales, Quotas	Neither	Both	Both	Both	Enables sales managers and sales administrators to set sales quotas for their directs.
Help Desk	Navigator only	Navigator only	Navigator only	Navigator only	Remove unless you're implementing Oracle Help Desk.
Business Plans	Both	Both	Both	Both	Salespeople and managers can use it to create business plans for the accounts they serve.
Contract Management	Neither	Neither	Neither	Navigator only	Remove. Sales users, including Sales Administrators cannot use contracts without additional security roles.
Incentive Compensation	Navigator only	Navigator only	Navigator only	Navigator only	Manage sales compensation.
Procurement	Navigator only	Navigator only	Navigator only	Navigator only	Remove unless you're implementing purchasing.

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
My Enterprise, Offerings	Neither	Neither	Neither	Both	Sales administrators and setup users enable the offerings related to the applications they purchased. You must enable the offering and its features for implementation.
My Enterprise, New Features	Neither	Neither	Neither	Navigator only	Sales administrators and setup users
My Enterprise, Subscriptions	Neither	Neither	Neither	Navigator only	Oracle Subscription Management information. Remove unless you're implementing Oracle Subscription Management.
Tools, Set Preferences	Both	Both	Both	Both	Lets users reset their password and upload their picture. The same Set Preferences is also available in the Settings and Actions menu that you can open by clicking on your user initials or image.
Tools, Spaces	Navigator only	Navigator only	Navigator only	Navigator only	Remove. Oracle Web Center Portal.
Tools, Scheduled Processes	Both	Both	Both	Both	Lets you monitor and run background processes.
Tools, File Import and Export	Navigator only	Navigator only	Navigator only	Navigator only	Remove. Imports Oracle Web Center content. Not used in Oracle CX Sales.
Tools, Smart Text	Neither	Neither	Neither	Navigator only	A feature administrators and implementors can use to change UI text and prompts.
Tools, Deep Links	Neither	Neither	Neither	Navigator only	Deep links make it possible to navigate from your company's

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
					pages directly to a page within your sales application without going through the menu structure.
Tools, Contact Search	Neither	Neither	Neither	Navigator only	Remove if you aren't using the telephony (CTI) feature.
Tools, Import Management	Navigator only	Navigator only	Navigator only	Navigator only	Import accounts, contacts, products and other sales information from a file.
Tools, Download Desktop Integration Installed	Navigator only	Navigator only	Navigator only	Navigator only	Remove if you aren't deploying Oracle Sales for Outlook.
Tools, Notification Preferences	Neither	Neither	Neither	Navigator only	Remove. Not used in sales. Feature to trigger automatic notifications.
Tools, Worklist	Both	Both	Both	Navigator only	Worklist notifications.
Tools, Reports and Analytics	Both	Both	Both	Navigator only	Create BI reports you can display in your sales application.
Tools, Export Management	Navigator only	Navigator only	Navigator only	Navigator only	Export accounts, contacts, products and other sales information as a file.
Tools, Mass Transfer	Neither	Neither	Neither	Both	Transfer data to other environments, for example, from test to production.
Configuration, Appearance	Neither	Neither	Neither	Navigator only	Change application home page layout, logos, icons and other feature.
Configuration, Structure	Neither	Neither	Neither	Navigator only	Change Navigator and springboard layout.

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
Configuration, Business Objects	Neither	Neither	Neither	Navigator only	Configure additional business objects for your application.
Others, Resource Directory	Navigator only	Navigator only	Navigator only	Navigator only	View the sales organization hierarchy.
Others, My Dashboard	Both	Both	Both	Both	Remove. Provides an alternative home page for your company.
Others, Setup and Maintenance	Neither	Neither	Neither	Both	Access setup tasks.
Others, Social	Both	Both	Both	Both	Opens the Oracle Social Network UI.
Others, Marketplace	Both	Both	Navigator only	Both	Links to Oracle Cloud Marketplace where you can view partner applications.
Others, Getting Started	Both	Both	Both	Both	Access short videos to help users get started. Your organization can add your own videos here.
Others, Cloud Customer Connect	Navigator only	Navigator only	Navigator only	Navigator only	Opens Cloud Customer Connect where users can interact with other users and ask questions.
Workspace	Both (after you enable Workspace)	Both (after you enable Workspace)	Both (after you enable Workspace)	Both (after you enable Workspace)	Workspace appears both in the Navigator and springboard automatically when you enable the feature. The Home Configuration page includes two versions of Workspace. One provides access to Workspace for sales job roles. The second version provides access for service job roles. The service version includes the ability to

Navigator Heading, Item	Sales Representative	Sales Manager	Sales VP	Sales Administrator	Recommendation
					view records in nested tabs (the dynamic tabs feature). Users see only one of these items, depending on their security privileges.

Configure Navigation

Use the Structure tool to configure which selections appear in the Navigator, which icons area available on the springboard, and which infolet tabs are visible to users.

Watch video

Create and Enter a Sandbox with the Structure Tool

Create and enter a sandbox with the Structure tool:

1. Navigate to **Configuration** > **Sandboxes**.
2. Click **Create Sandbox**.
3. In the Create Sandbox page, enter a name and select **Structure** as the tool.
4. Click **Create and Enter**.

   The Sandbox toolbar appears at the top of the page.
5. From **Tools**, select **Structure** to open the Structure page.

Specify What Users See on the Navigator and in the Springboard

With the **Navigation Configuration** tab selected, you can configure what appears on the Navigator and springboard. Just click the item or group name to edit.

- Specify where and for whom the item shows up by making a selection from **Show on Navigator** and **Show on Springboard**. You can choose to display individual items in the Navigator only, in both the Navigator and springboard, or in neither. You can't display an item in the springboard only. If you hide an item in the Navigator, it gets automatically hidden on the springboard as well. Here are the options:
  - **Yes**: displays the item for all users with the right security permissions.
  - **No**: hides the item from all users in all applications.

- **EL Expression**: lets you add an EL Expression that must be true to display the item.

  Add EL Expression conditions to display items or groups selectively to users with specific job roles, or even by user name. Here are some examples of EL Expressions you can use:

Who can see the group or page entry	EL Expression and Example

Only users having any of the specific roles	`#{securityContext.userInRole['<Role_Name>']}`
	
	`#{securityContext.userInRole['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT']}`

Only users not having any of the specific roles	`#{!(securityContext.userInRole['<Role_Name>']}`
	
	`#{!(securityContext.userInRole['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT'])}`

Only users having all of the specific roles	`#{securityContext.userInAllRoles['<Role_Name>']}`
	
	`#{securityContext.userInAllRoles['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT']}`

Only users not having all of the specific roles	`#{!(securityContext.userInAllRoles['<Role_Name>']}`
	
	`#{!(securityContext.userInAllRoles['ORA_FND_APPLICATION_ADMINISTRATOR_JOB,ORA_PER_EMPLOYEE_ABSTRACT'])}`

Only users having access to specific resources, for example, the Social work area	`#{securityContext.userGrantedResource['resourceType=FNDResourceType;resourceLaunch_Social_Menu;action=launch']}`

- Rename a group and change its icon.
- Move items to a different group by using the arrow keys, or by selecting a different group while editing the item. You can't nest groups within other groups.

  For example, move both Workspace items from the Workspace group to the Sales group. There are two Workspace items because Oracle provides two different versions of Workspace: one for sales and one for service. Users see only one icon on their home page, depending on their security settings.
- Copy items.
- Move items within a group using the up and down arrow keys.

  For example, you may want to move the Workspace icon to be the first icon users see on their page.

- Get rid of the **Others** group.

  Any top-level items (items that aren't part of a group in the Structure tool) display in the Others group in the UI. You can't rename that category or move it, but you can hide the group by moving or hiding all items in it.

- Create new groups and add your own content.

  You can create new groups from the **Create** menu and display them selectively by adding EL Expressions. You can copy items into the group or create your own items by selecting **Create Page Entry** from the **Create** menu.

  > **Note:** To simplify future functionality updates, don't create groups to provide different views for different sets of users, however. Add the EL Expressions to individual items instead.

Example of Hiding a Whole Navigator Group You Don't Use

If you aren't implementing Oracle Global Human Resources Cloud, then hide the whole **Me** group, which appears in the Navigator for all sales users by default.

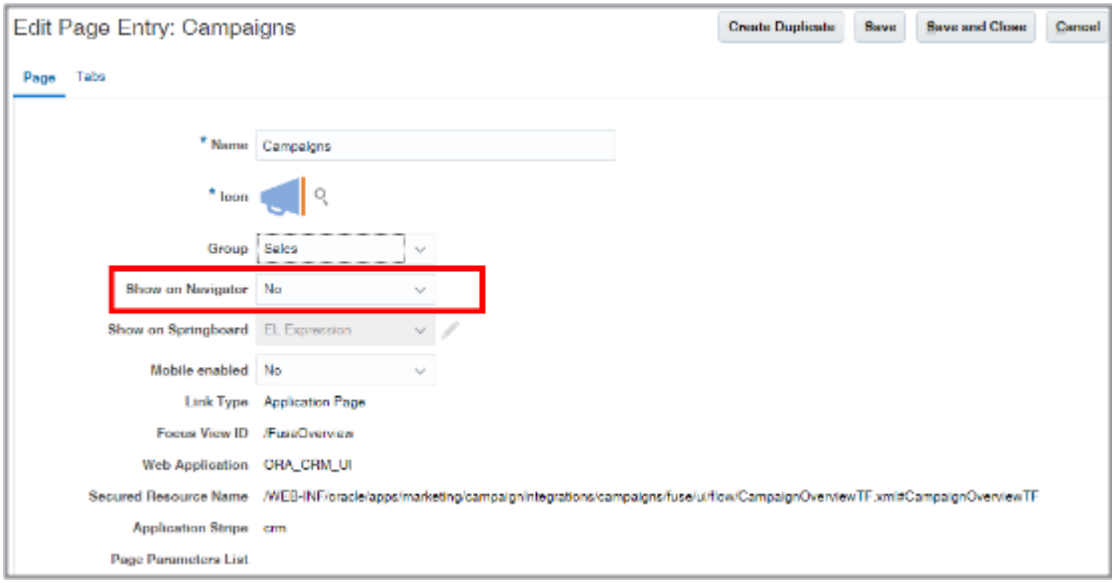
1. Click the **Me** group name.
2. Set **Show on Navigator** to **No**. Hiding the group hides all of the individual items in the group as well.

Example of Hiding an Individual Sales Feature You Don't Use

If you aren't implementing Oracle Marketing Cloud, then remove the **Campaigns** item from both from the Navigator and springboard:

1. Open the **Sales** group to display the different sales features.
2. Click **Campaigns**
3. In the Edit Page Entry page, set **Show on Navigator** to **No**.

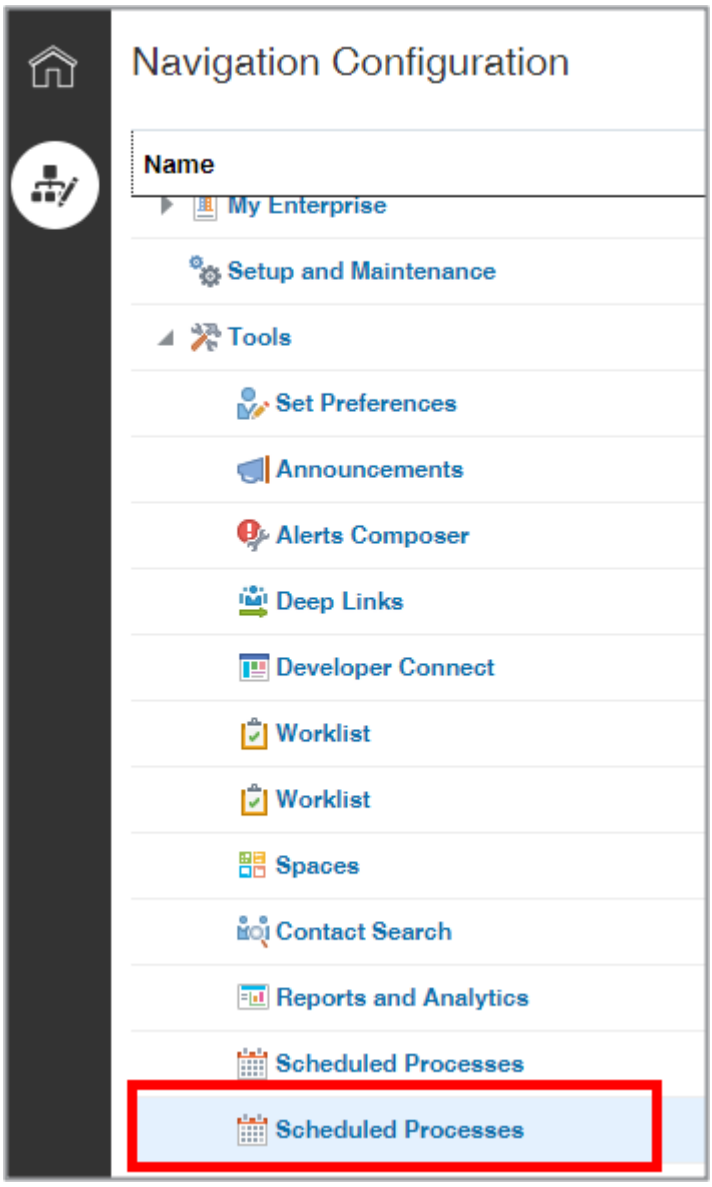
   Removing the selection from the Navigator automatically removes the link from the springboard as well. You can't display a selection on the springboard if it's not displayed in the Navigator



Selectively Hide Navigation

You may want to leave technical tasks, such as importing data or monitoring scheduled processes, to sales administrators. To remove the navigation links for a subset of users, you edit the EL Expression for these items and add your conditions. For example, here's how to remove the Scheduled Processes navigation from both the Navigator and springboard for all salespeople with the Sales Representative job role:

1. Open the **Tools** group to display its selections.
2. Click the second **Scheduled Processes** item.
   Here's a screenshot of a portion of the Navigation Configuration page highlighting the item.



> **Note:** Oracle includes two Scheduled Processes items in the list because it supports two different interfaces for scheduled processes. If you aren't sure which item to edit, add your condition to both.

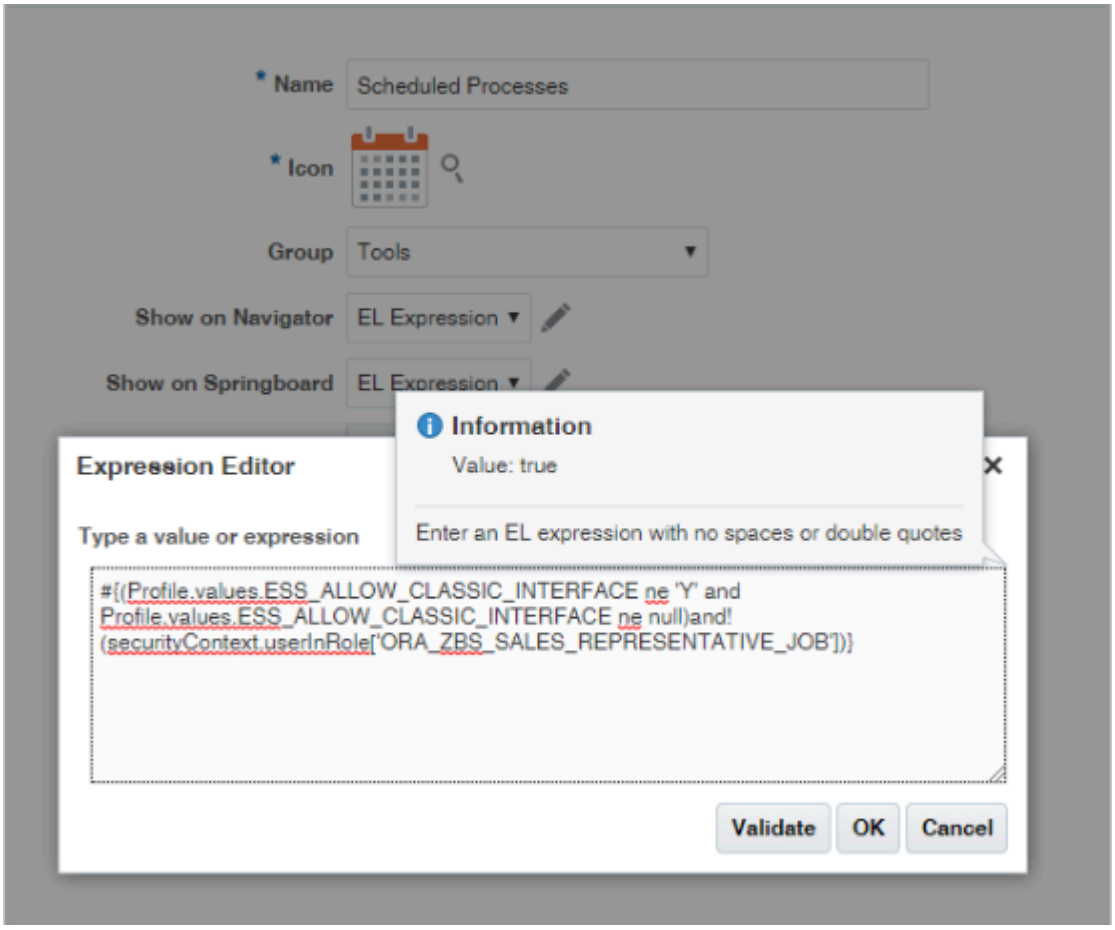
3. Click **Edit** for **Show on Navigator** to edit the EL Expression.

The Expression Editor displays the expression provided by Oracle. In this example:
`#{(securityContext.userGrantedResource['resourceType=FNDResourceType;resourceName=FND_Scheduled_Processes_Menu;a and(Profile.values.ESS_ALLOW_CLASSIC_INTERFACE ne null) and (Profile.values.ESS_ALLOW_CLASSIC_INTERFACE ne 'Y')}`

4. In the Expression Editor, append the condition: `and!(securityContext.userInRole['ORA_ZBS_SALES_REPRESENTATIVE_JOB'])` to the original expression.

   Here's the resulting expression:
   `#{(securityContext.userGrantedResource['resourceType=FNDResourceType;resourceName=FND_Scheduled_Processes_Menu;a and(Profile.values.ESS_ALLOW_CLASSIC_INTERFACE ne null) and (Profile.values.ESS_ALLOW_CLASSIC_INTERFACE ne 'Y')and!(securityContext.userInRole['ORA_ZBS_SALES_REPRESENTATIVE_JOB'])}`
5. Click **Validate** to check for errors.
6. Click **OK**.
7. It's a good idea to click **Save** after each edit to make sure your changes are saved.
8. Repeat the steps to add the condition to the **Show on Springboard** EL Expression.

   Here's a screenshot of the Expression Editor with the edited Show on Springboard expression: :`#{(Profile.values.ESS_ALLOW_CLASSIC_INTERFACE ne 'Y' and Profile.values.ESS_ALLOW_CLASSIC_INTERFACE ne null)and!(securityContext.userInRole['ORA_ZBS_SALES_REPRESENTATIVE_JOB'])}`



Specify Which Infolet Tabs Appear and in Which Order

You can specify which infolet tabs appear and in which order.

1. While in the Structure tool, click the **Home Configuration** tab.
2. Use the arrow keys to change the order of the infolet tabs.
3. To edit the infolet tab name and to specify how the infolet page gets displayed, click its name:
    - **Yes**: displays the infolet tab for all users with the right security permissions.
    - **No**: hides the infolet tab from all users in all applications.
    - **EL Expression**: lets you add an EL Expression condition that must be true to display the infolet page.
4. To create additional infolet tabs with your own content, you can edit the five sales tabs crated for this purpose: **Sales Page 1** through **Sales Page 5**.

Related Topics

- Examples of EL Expressions
- Overview of Configuring Home Page and Navigation

Enable and Configure Workspace Infolets

Enable Workspace Infolets

Enable Workspace infolets by setting the profile Enable Workspace Infolets (ZCA_ENABLE_ADAPTIVE_INFOLETS) to Yes. Here's how:

1. In the Setup and Maintenance work area, go to the **Manage Administrator Profile Values** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. On the Manage Administrator Profile Values page, search for the profile option by entering ZCA_ENABLE_ADAPTIVE_INFOLETS in the **Profile Option Code** field.
3. Click **Search**.
4. In the ZCA_ENABLE_ADAPTIVE_INFOLETS: Profile Values section, set the profile value to Yes.
5. Click **Save and Close**.

Create and Enter a Sandbox with Page Composer as Your Tool

You can create different Workspace infolet configurations for the whole enterprise, or for specific job roles. If you're configuring different configurations of Workspace infolets for different job roles, then you must create separate sandboxes for each job role.

1. Navigate to **Configuration** > **Sandboxes**.
2. Click **Create Sandbox**.

3. In the Create Sandbox page, enter a name and select **Page Composer** as the tool.
4. If you want to create different infolet configurations for different user roles, select the job role:
    a. Click **Edit** in the **Support Context** column for Page Composer.
    b. In the Edit Sandbox Context window, select **Job Role** and select the job role you want to configure.

        Each job role can access different saved searches and can have a different infolet configuration on their page.
    c. Click **OK**.
5. Click **Create and Enter**.

    The Sandbox toolbar appears at the top of the page.
6. Click **Home** to return to the home page.
7. In the sandbox, select **Page Composer** from the **Tools** menu.

    The Page Composer toolbar appears underneath the sandbox toolbar.

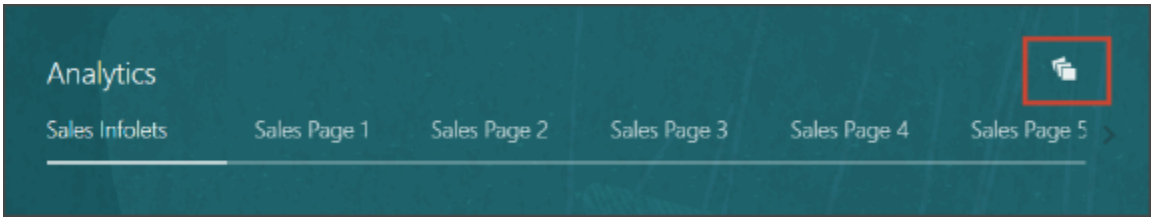
Specify Which Workspace Infolets Display and In What Order

Use this procedure to specify which infolets salespeople see when they open the page and in which order.

1. With Page Composer and your sandbox open, scroll down to the **Analytics** section, Sales Infolets tab, where the Workspace infolets are located.

2. You must expose Workspace infolets one by one. Here's how:

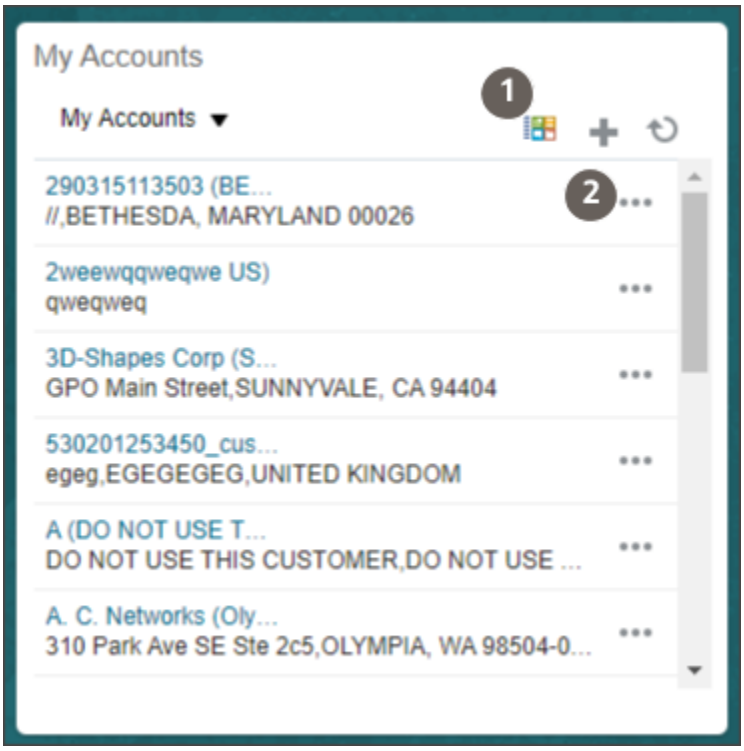
    a. Click **Infolet Repository** (the file icon on the top right side of the Analytics heading highlighted in the screenshot).



    b. Select one of the 10 Workspace infolets. If the list includes two infolets with the same name, select the second one on the list. For example, the Infolet Repository list may include two entries for My Account, My Opportunities, and so on.

> **Note:** Even though you set the profile to use the Workspace infolets, the older version of actionable infolets remains present when you configure the view for a site, for example. These older infolets are present on the list during configuration, but not displayed to users because of the value of the EL Expressions they contain.

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



    If you displayed the wrong infolet by mistake, just expose the second one.

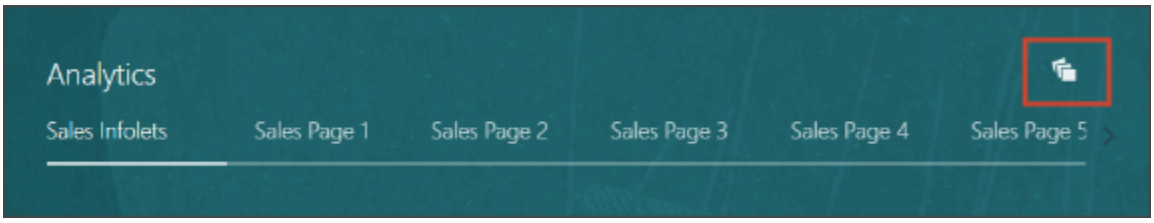
3. Change the order of the infolets by dragging them around. Alternately, you can click the **Infolet Repository** icon, scroll down in the list and select **Reorder Infolets**.

4. If you are done with your configuration, be sure to click **Close** on the Page Composer toolbar to save your changes before publishing the sandbox.

Configure Workspace Infolets

You can configure any of the 10 Workspace infolets provided by Oracle, including the six that are predefined for you.

1. With Page Composer and your sandbox open, scroll down to the **Analytics** section, Sales Infolets tab, where the Workspace infolets are located.
2. If the infolet you want to configure isn't displayed in the Sales Infolets tab, you must display it on the page. Here's how:
    a. Click **Infolet Repository** (the file icon on the top right side of the Analytics heading highlighted in the screenshot).



    b. Select the Workspace infolets you want to configure. If you're configuring one of the predefined infolets, and the list includes two infolets with the same name, select the second one on the list. For example, the Infolet Repository list may include two entries for My Account, My Opportunities, and so on.

> **Note:** Even though you set the profile to use the Workspace infolets, the older versions of the predefined infolets remain present when you make site-level configurations. These older actionable infolets are present on the list during configuration, but not displayed to users. You can recognize which infolet is which because the predefined Workspace infolets include the Workspace icon and the three dots for quick actions.

Change the Infolet Title

1. In the right top corner of an infolet, click **Actions** (the down arrow) and select **Edit Title and Views**.
2. Edit the title.
3. Click **Save and Close**.

> **Note:** You can't add use the other sections of this window to configure Workspace infolets. You can't display BI reports or other content on the back of this type of infolet.

4. If you're done with your configuration, be sure to click **Close** on the Page Composer toolbar to save your changes before publishing the sandbox.

Specify Which Saved Searches Appear in the Infolet

1. In the right top corner of an infolet, click **Actions** (the down arrow) and select **Configure**.
2. In the Manage Infolet window, **Filters** tab, use the arrows to move the saved searches you want to display in the infolet to the **Selected** column. The saved searches determine what information salespeople can display

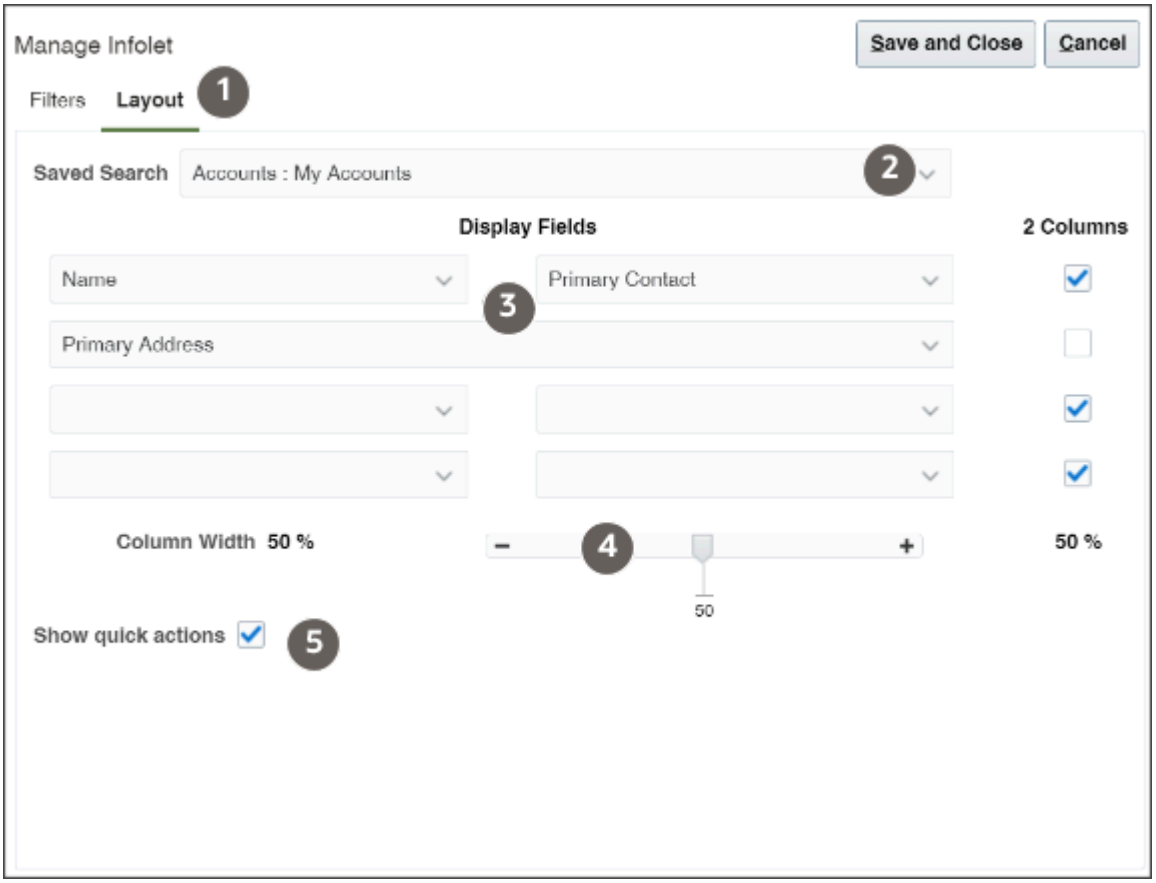
in the infolet. You aren't limited to selecting saved searches for just one object. For example, you could select Accounts: My Accounts and Assets: My Customer's Active Assets.

3. If you're done with your configuration, be sure to click **Close** on the Page Composer toolbar to save your changes before publishing the sandbox.

Specify What Fields Display for Each Saved Search

Here's how to determine which fields display on the infolet for each record. You must configure each saved search you are using separately.

1. In the right top corner of an infolet, click **Actions** (the down arrow) and select **Configure**.
2. In the Manage Infolet window, select the **Layout** tab (callout 1 in the screenshot).
3. Select the saved search you want to configure (callout 2).
4. Add the fields you want to display (callout 3). Be sure to always display the **Name** field: it provides the link that salespeople use to drill down into the record.
5. You can adjust the relative width of the columns using the slider (callout 4).
6. Keep the **Show quick actions** option selected to display the actions for each record (callout 5).



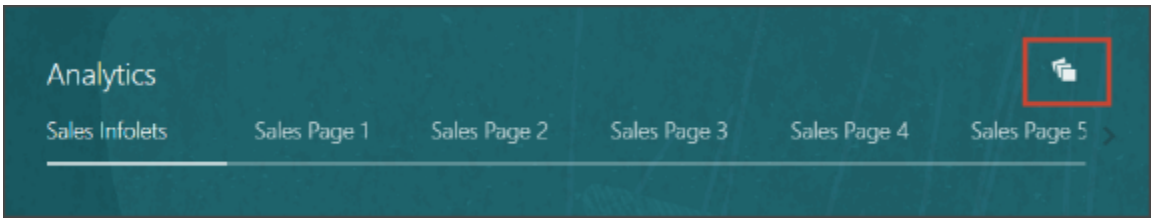
7. If you're done with your configurations, be sure to click **Close** on the Page Composer toolbar to save your changes before publishing the sandbox.

Hide Unused Workspace Infolets from Users

Remove unused Workspace infolets from use by changing their visibility. Unless you change their visibility, infolets are listed in the Infolet Repository list and available for display by salespeople even if you remove them from the page.

You may want to remove the four blank infolets (Additional Actionable Infolets) if you aren't using them, for example. Here's how:

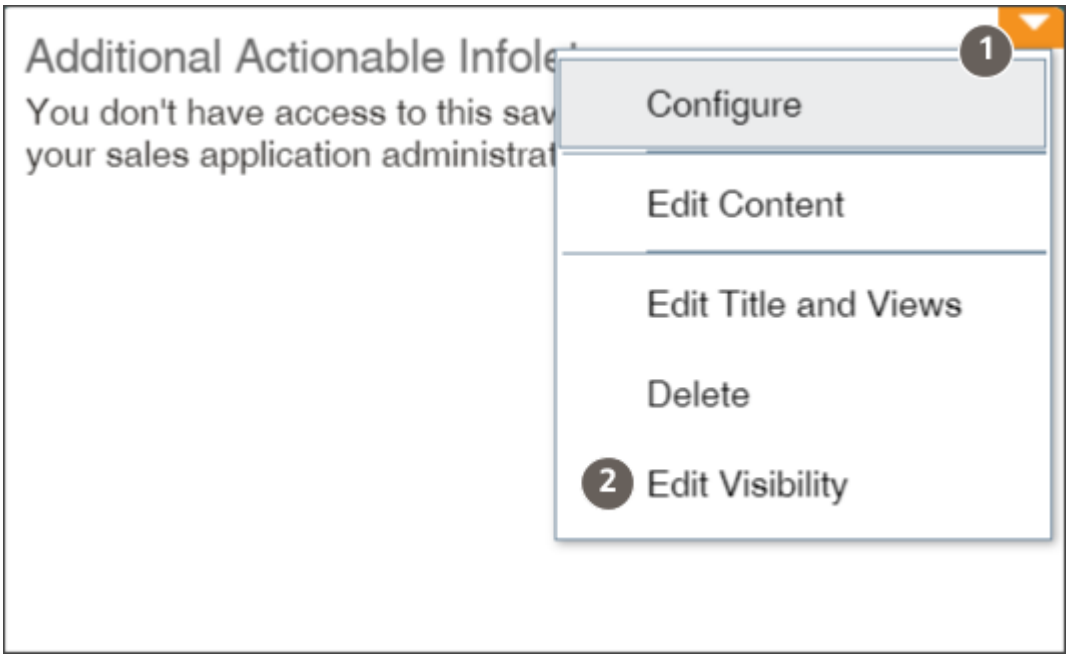
1. With Page Composer and your sandbox open, scroll down to the **Analytics** section, Sales Infolets tab, where the Workspace infolets are located.
2. Before you can change their visibility, you must expose the Workspace infolets you want to remove. Here's how:
    a. Click **Infolet Repository** (the file icon on the top right side of the Analytics heading highlighted in the screenshot).



    b. Select one of the Workspace infolets you want to remove. If you're removing one of the predefined infolets, and the list includes two infolets with the same name, select the second one on the list. For example, the Infolet Repository list may include two entries for My Account, My Opportunities, and so on.

> **Note:** Even though you set the profile to use the Workspace infolets, the older versions of the predefined infolets remain present when you make site-level configurations. These older actionable infolets are present on the list during configuration, but not displayed to users. You can recognize which infolet is which because the predefined Workspace infolets include the Workspace icon and the three dots for quick actions.

3. In the right top corner of the infolet, click **Actions** (the down arrow identified by callout 1) and select **Edit Visibility** (callout 2).



> **CAUTION:** Don't select **Delete**. Deleting removes the infolet entirely. If you delete an infolet by accident, you must contact Oracle Support to restore it.

4. In the Edit Visibility window, **Visible** list, select **No**.



5. Click **Save and Close**.

   The Workspace infolet is grayed out on the page. The infolet remains in listed in your Infolet Repository list, but it doesn't appear to users after you publish the sandbox.
6. If you're done with your configuration, be sure to click **Close** on the Page Composer toolbar to save your changes before publishing the sandbox.

28 Microsoft Outlook Add-In

About Integrating the Outlook Add-in with Oracle Sales

Oracle currently supports two versions of the Microsoft Outlook add-in. It's highly recommended that you use the latest version – the Microsoft 365 add-in for Oracle Sales Redwood User Experience (hereafter called Microsoft 365 for Redwood UX) which consists of the next-generation Microsoft Outlook add-in and sync capabilities.

> **Note:** If you're migrating the CX Sales for Microsoft 365 integration to the Oracle Sales Redwood UX for Microsoft 365 integration, there are specific steps for the migration. See *Migration Overview* for more information. For more information about setup steps, start with the *How do I implement Microsoft 365 for Oracle Sales Redwood UX?* playbook on *Oracle Help Center > Sales > Playbooks page*.

29 Mobile

Overview of CX Sales Mobile

The Oracle CX Sales Mobile app helps your users manage their day effectively and develop customer relationships using their phone or tablet.

Read the following sections to learn more.

To begin implementing Mobile, start with *Overview of CX Sales Mobile Setup*.

Manage Sales Activities

Sales teams can manage Sales activities. Here are the highlights:

- Use the action-driven, configurable home page that contains a sales briefing, letting salespeople track the sales pipeline and stay on top of daily activities.
- Leverage optimized task-based flows for key sales functions: Accounts, contacts, leads, opportunities, activities, assets, service requests, partners, and custom objects.
- View, create, and edit tasks, appointments, and call reports.
- Saved searches that are shared across CX Sales Mobile and Workspace lists, for consistency across applications.
- View your recently accessed records in the app when using the global search, or when sharing notes from an external app.
- Add contacts and leads to CX Sales Mobile from the mobile device's address book.
- Create contacts and leads by using a photo of a business card.
- Scan an asset's bar code to search for an asset and automatically enter the asset serial number.
- Share notes, photos, videos, documents, or files from mobile to Sales accounts, opportunities, or other records.
- Plan your sales activities around your current location by viewing your nearby contacts, accounts, opportunities, and leads plotted on an interactive map. You can also plan future appointments in a city or near an address with an easy location search.
- View your quotes in the app and stay updated on the quote status. View and send quote proposal documents to customers, or share them with your team for feedback.
- View reports and analytics with modern visualizations optimized for mobile displays, such as bar graphs, funnels, bubble charts, and more. Role-based layouts let sales administrators provide unique experiences to salespeople, managers, and others.

Manage Partner Relationship Management Activities

Partners can manage Oracle Partner Relationship Management activities:

- Partner users can effectively manage and improve channel sales on-the-go.
- Channel Managers can track overall channel sales and also easily manage partners, partner contacts, and related information.
- Partner role-based restriction features let you configure the app according to your business requirements.

Oracle Sales Assistant Chatbot

Integrate with the Oracle Sales Assistant chatbot to get these features:

- Oracle Sales Assistant helps salespeople perform their daily sales-related tasks. Using their phones, they can type or use your voice to ask questions, and the sales assistant retrieves the information or acts on the requests.
- Sales Assistant reduces manual data entry and makes it easier to view and update sales records using voice commands or typing.

> **Note:** If you need help enabling the Sales Assistant, send us a message on the *Sales Assistant forum* on Oracle Cloud Customer Connect.

New Design for Efficiency on the Go

Take advantage of these new design for efficiencies on-the-go:

- Modern and intuitive user experience, designed to boost productivity with fast and seamless interactions.
- At-a-glance record views for a quick grasp of summary, key, and related information.
- Access contextual actions everywhere for fast and easy record updates.
- Improved picker experience powered by Adaptive Search.

Global Search

These global search features make finding records efficient:

- Fast and simple search across all objects in one place.
- Use the multi-keyword search across multiple fields for faster and easier access to information.
- Search more easily with recent searches and type ahead results that display results as you type.
- Filter search results by object types.

New and Improved Sign-In Experience

This version of the mobile app has a new and improved sign-in experience:

- Scan a QR code to sign in easily using your single sign-on credentials or using basic authentication.
- Use face or fingerprint recognition to securely sign in to the app.
- View new configurations with fast download and instant activation of your configurations.
- Enable OAuth authentication token support to let users stay signed in to the app for longer.

Use a Phone or Tablet

Use either a phone or tablet to access the app. Using a tablet changes the display to 2x portrait mode.

Easy Configuration

Implement Mobile using these easy configuration aspects:

- Configure the app using the new interface designer.
- Create criteria for page layouts for both standard and custom objects.
- Download your configurations to the app quickly and easily. Mobile automatically signs you in to the correct sandbox without restarting the app.
- Create custom scripts that enforce custom validations and business logic for both top-level parent and child objects.

Use Offline

Salespeople can use Mobile in offline mode when they're not able to be online:

- View and edit Sales data in areas with no network connection.
- Sync automatically when a connection is re-established.

30 Account Data Enrichment and Verification

Two Services to Enrich and Verify Your Data and Save Salespeople Time

Perhaps nothing is more important for your sales effort than having up-to-date and actionable information about your customers and contacts and minimizing the time salespeople spend entering data. Oracle provides two services that enrich your customer data, improve its accuracy, and eliminate data entry time.

For account and contact information, you can obtain information on millions of companies worldwide by subscribing to the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B). A second service, Oracle Address, Email, and Phone Verification, ensures that you have the correct postal addresses, that your emails don't bounce, and your calls go through.

> **Note:** Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) is the new name for Data as a Service (DaaS).

Here's an overview of the 2 services:

Service	Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B)	Oracle Address, Email, and Phone Verification
Purpose	Account and contact search, enrichment, and prospecting.	Address, phone, and email address verification.
What It Does	Instead of entering data themselves when they create accounts, salespeople can look up the organizations they sell to from Dun & Bradstreet Corporation, one of the premier sources of business information. The service provides access to more than 347 million account records and more than 135 million contact records worldwide. Included is information about more than 90 different company attributes, including sales volume, growth data, hiring trends, competitors, and so on. Users can also filter the data by using over 60 company or contact attributes such as industry, revenue, company hierarchy, private or public indicator, contact title, contact department. The service also provides information about account hierarchies, showing the linkages between a corporation's subsidiaries, branches, and divisions. You can also schedule account or contact enrichment on thousands of records at the same time.	Salespeople can search and validate addresses in more than 248 countries using data from Loqate. They can verify addresses when creating or editing an account: correct misspellings, add missing elements (such as the postal code), and standardize elements (for example, changing "Drv" to "Dr"). You can also schedule address verification on thousands of records at the same time. The service automatically checks if phone numbers and email addresses exist and informs you if they're invalid. No more bounced emails or calls that don't go through.

Service	Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B)	Oracle Address, Email, and Phone Verification
	Oracle licenses account and contact enrichment separately. You subscribe to the Oracle Account Enrichment Cloud Service and the Oracle Contact Enrichment Cloud Service.	
How It Works	Salespeople start typing the account name, and the application suggests possible matches straight away. Selecting a match automatically fills in all the rest of the information. Salespeople can add contacts to accounts by job role. Selecting the Enrich action for existing accounts gets the latest information. The account and contact information continues to be updated automatically based on synchronization rules setup by your administrator.	Salespeople start typing the street address in the search field and the application starts suggesting possible matches. Selecting one of the suggestions fills in the rest of the address fields. You can also enable a Verify Address button that salespeople can use to verify addresses for a particular country. That's useful if you added nonstandard fields to the address or if salespeople don't always use the search field to look up an address. You can also verify and update addresses in bulk. The service informs salespeople if phone numbers and email addresses are invalid as soon as they enter them. They can also verify any existing ones to make sure they're still valid.
Setup	After you activate the service, and complete the simple setup described in this chapter in your sales application, salespeople can start looking up and enriching their data right away. To get the most out of the application, however, you must add fields to the UI to expose the additional information you're getting. While most of the information maps onto fields you can expose using Application Composer, you must create some custom fields to map the rest.	After you activate the service, and complete the simple setup described in this chapter in your sales application, salespeople can start looking up street addresses and verifying phone numbers and email addresses. In the CX Sales (Classic UI), you can also expose the Verify Address button with a few extra steps.
Where to Get More Information	This guide includes the information you need to get started. You can get the full scoop in the Using Account and Contact Enrichment by Dun & Bradstreet guide.	This guide includes the information you need to get started. You can get the full scoop in the Using Oracle Address, Email, and Phone Verification guide.

Related Topics

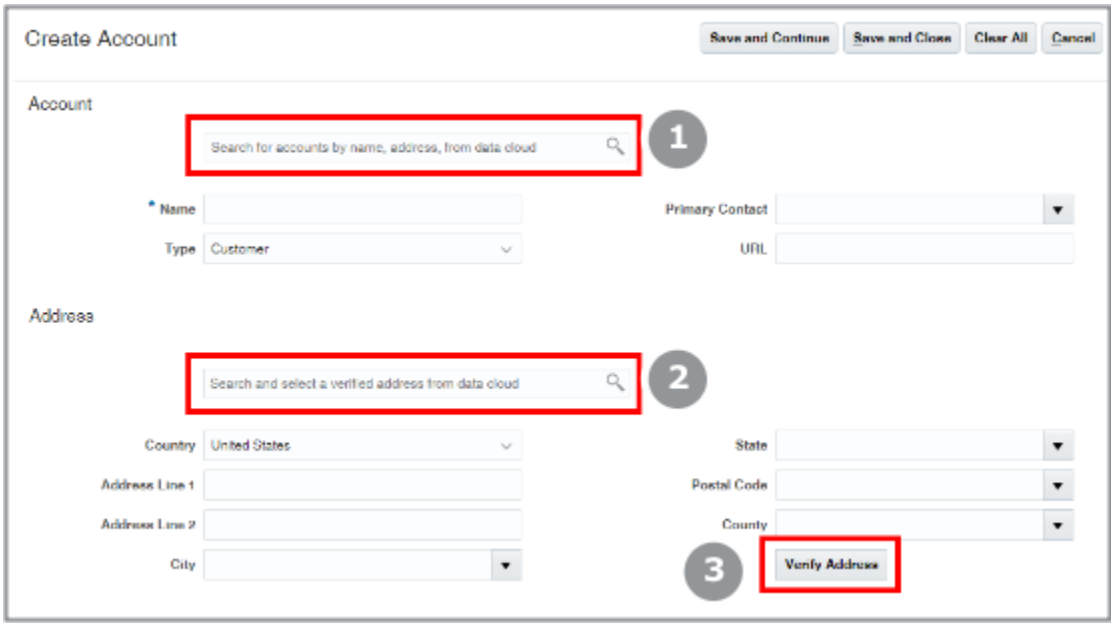
Enrichment and Verification You Can Start Using Right Away

After you complete the brief setup described in this chapter, salespeople can start enriching and verifying their customer data with two of the services: Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) and Oracle Address, Email, and Phone Verification. Additional fields and actions appear automatically in all of the appropriate create or edit account, lead, and contact pages. Here's a brief summary of how it works.

Saving Time Entering Accounts, Contacts, and Addresses

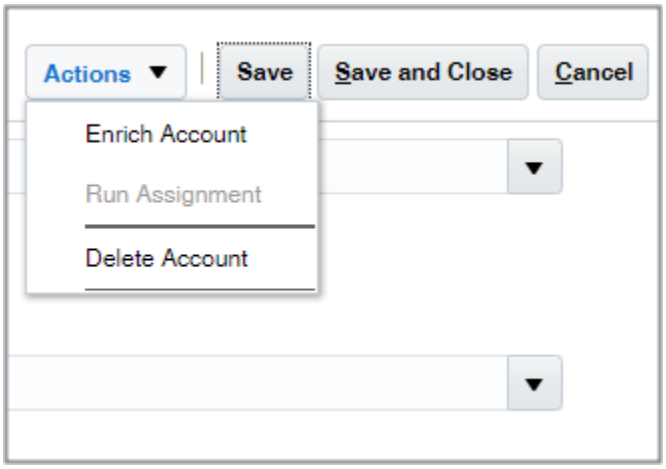
Salespeople can start saving time and improving accuracy while creating new accounts right away. Instead of entering data about an account themselves, they search for the account and address in new search fields, and the information is populated automatically. Here's a screenshot of the CX Sales Create Account page with callouts highlighting the new UI elements.

Callout Number	New UI Element	Description
1	Account search	Salespeople search for accounts by name or by address and add them. The application suggests possible matches as soon as they start typing. Selecting an account populates the available company data.
2	Address search	Salespeople start typing an address and the service starts suggesting matching addresses. Selecting an address populates all of the address data.
3	Verify Address button	If you enable the optional Verify Address button, salespeople can verify an address that they enter in the CX Sales UI or import from a file. You can enable this field with a few setups for CX Sales UIs only. If salespeople use the address search consistently, they don't need the button.

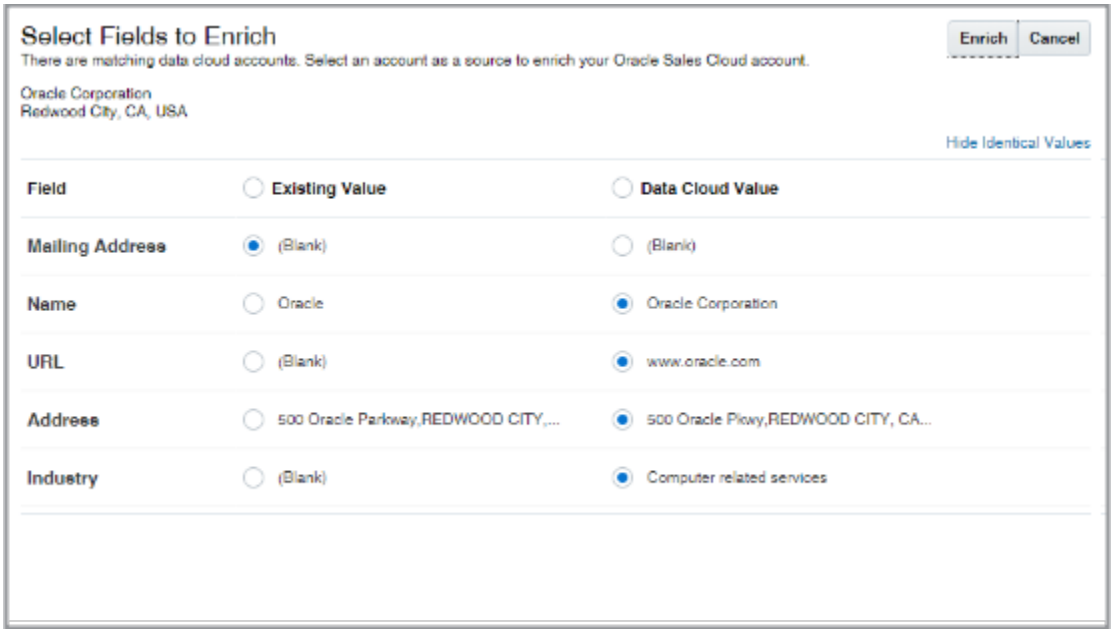


Enriching Existing Accounts

To enrich an existing account, salespeople use the **Enrich Account** action available in all the UI pages where you edit accounts. Here's a screenshot of the Actions menu in the Edit Account page.



When you enrich an account, you get to choose which fields to keep and which to replace.



If you're adding contacts to an account, you can add whole sets of contacts using criteria such as job category. You can also enrich multiple accounts and contacts at the same time on the landing page.

If you subscribe to Customer Data Management, you also have the option of enriching large batches of accounts and contacts in the Data Enrichment work area.

Email Address and Phone Number Verification

When you enter a phone number or an email address, the application automatically checks if they're valid. The application can't check if the phone numbers and emails you enter are valid for the specific person or account, of course, but it does assure that a phone number will actually dial and that an email won't bounce.

If the email or phone number you enter isn't valid, you get informed right away: the application displays the status right under the field. If nothing appears, your entry is valid. Here's a screenshot of a phone number to give you an idea of what appears under invalid information:

Callout Number	Description
1	Status. For phone numbers, this can be only **Invalid**. Email addresses can also display the status of **Partially-Valid**: the domain is valid but the name can't be verified. A Partially-Valid status for an email means that the complete email can't be verified by Loqate, but Loqate did validate the email domain. If the person left the company, or changed their name, you'll see the **Partially-Valid** status for the email, for example.
2	Date the email address or phone number was verified by the application.
3	Reverify button that you can use to verify again. You never know when area codes or email addresses may change. What's valid today may not be in 6 months.
4	Overwrite button to manually set the status. The application, isn't perfect. If you know that the number or email is correct, you can set the status to **Verified**. When you do, you see **Overwritten on** instead of **Verified on**.

Callout Number	Description



The application does display a **Valid** status, but only much later. By default, the status appears 180 days later. When the information is old, salespeople may want to verify it again by clicking on the Reverify button. You can specify the number of days before the Valid status appears or even turn this option off during setup. For details, see the topic: Enable the Verification of Addresses, Emails, and Phone Numbers.

Three Ways to Enrich Data

There are three ways to enrich account and contact data from the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) service:

- Real-time enrichment

  You can enrich data directly in the Account and Contact pages as described in this chapter.

  The real-time enrichment uses the REST APIs and the mapping you maintain using the Manage Oracle Data as a Service Attribute Mapping and Preferences task in the Setup and Maintenance work area.
- Manual enrichment

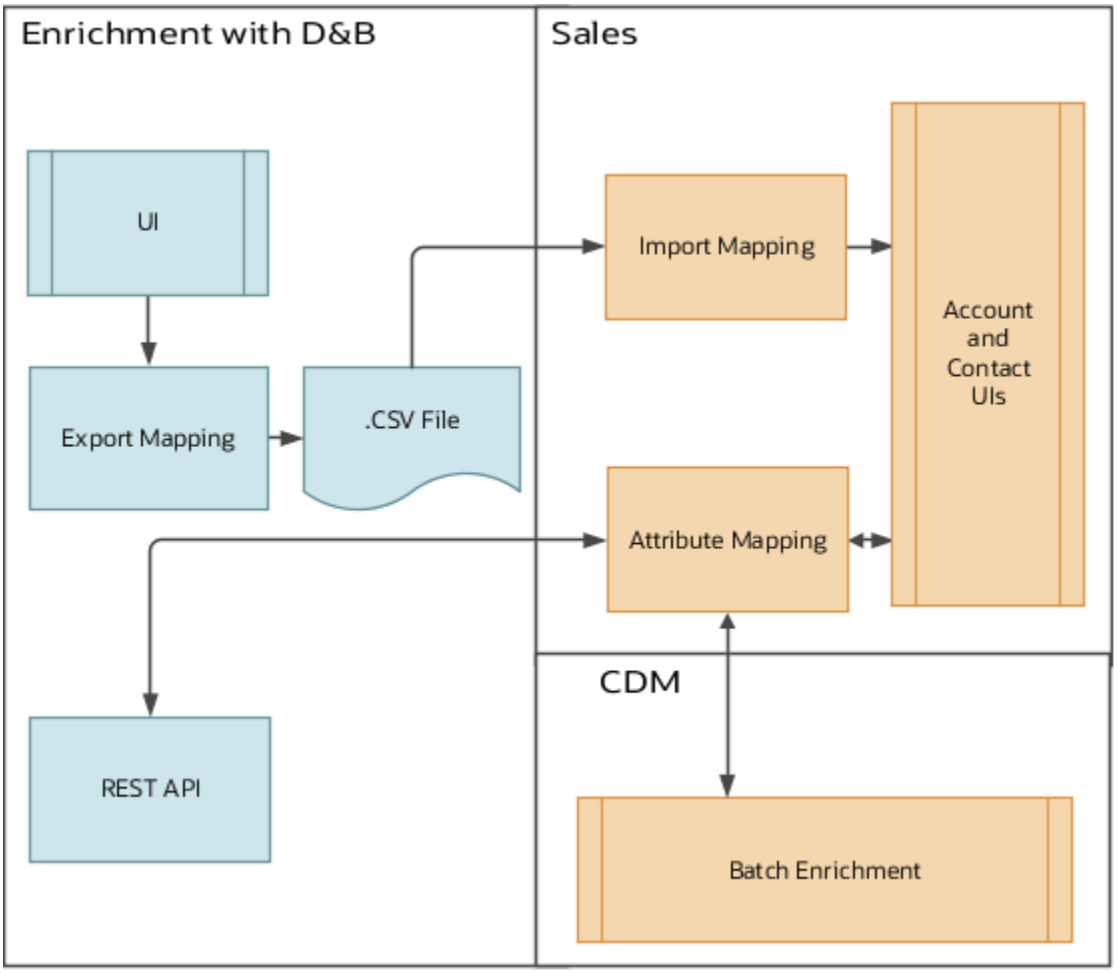
  You can do your sales prospecting in the D&B service UI, which provides more ways to filter and search. You then export your account or contact records into a file and import the file into your sales application.

  The D&B service includes a default export mapping you can edit. You can edit the import mapping in the sales application. The Using Account and Contact Enrichment by Dun & Bradstreet guide provides the details about the export and import mappings.
- Batch enrichment

  You can also enrich your account and contact data in bulk. Bulk enrichment uses the same REST APIs and mapping you maintain in Manage Oracle Data as a Service Attribute Mapping and Preferences. However, the integration doesn't support any additional custom fields you add.

Here's a diagram to illustrate the architecture:

- The D&B service includes the mapping you can use to export a file with accounts and contacts. Importing the file using Import Management into your sales application uses an import mapping.
- The real-time enrichment feature and Oracle Customer Data Management (CDM) both use the REST APIs and the mapping you can update in your sales application. The mapping determines which fields show up in the UI.



Overview of Data Enrichment and Verification Setup

This chapter outlines the process for setting up two Oracle cloud services that enrich and verify your account and contact data: Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) and Oracle Address, Email, and Phone Verification.

When your organization subscribes to Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) and Oracle Address, Email, and Phone Verification services, the person or people designated as the service administrators for your sales application domain or the account administrator, receive a welcome email. You must be one of the service administrators to complete the setup. If you don't receive the email, you can ask the account administrator to create you as a service administrator or resend the email. Here's a list of the setup tasks.

Before you start, you must complete the required setup in the Oracle Cloud Dashboard. See the Using Account and Contact Enrichment by Dun & Bradstreet guide for details.

Step	Applies To	Description	Navigation or Steps	Where to Get More Details
1	Both CX Sales and Digital Sales	Enter the service URL, and the user name and password for a user with the role: DATASERVICE CLIENT API APPID, in two separate pages in Setup and Maintenance: • Manage Integration with Oracle Data as a Service • Manage Integration with Oracle Verification Services	**Setup and Maintenance** > **Sales** > **Integrations** > **Manage Integration with Oracle Data as a Service** **Setup and Maintenance** > **Sales** > **Integrations** > **Manage Integration with Oracle Verification Services**	See the topic: *Integrate the Account Enrichment and Verification Services*
2	Both CX Sales and Digital Sales	Enable the UI verification for street addresses, email addresses, and phone numbers.	**Setup and Maintenance** > **Sales** > **Data Quality Verification Services** > **Quick Setup**	See the topic: *Enable the Verification of Addresses, Emails, and Phone Numbers*
3	CX Sales	Optionally, you can enable a Verify Address button that salespeople can use in CX Sales to verify addresses entered manually.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Geographies**	See the topic: *Enable the Verify Address Button*
4	Both CX Sales and Digital Sales	Salespeople don't see all of the great account and contact information you enrich unless you expose additional fields in the UI. Some of the additional information you get from D&B is already mapped to existing sales account and contact fields. All you need to do is to use Application Composer to add these fields to the UI. For other attributes, you must create custom fields and add them to the mapping.	**Navigator** > **Configuration** > **Application Composer** **Setup and Maintenance** > **Sales** > **Accounts and Contacts** > **Show** > **Manage Oracle Data as a Service Attribute Mapping and Preferences**	See the topics: • *Add Enriched Fields to the Account and Contact Pages* • *Add Fields to the Mapping*
5	Both CX Sales and Digital Sales	Specify if you are enriching accounts, contacts, or both and indicate enrichment preferences. This setup is done in the Preferences tab on the same Manage Oracle Data as a Service Attribute Mapping and Preferences page you used in the previous step.	**Setup and Maintenance** > **Sales** > **Accounts and Contacts** > **Show** > **Manage Oracle Data as a Service Attribute Mapping and Preferences**	See the topic: *Configure Enrichment Preferences*

Related Topics

Integrate the Account Enrichment and Verification Services

Here's how to integrate the Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) and the Oracle Address, Email, and Phone Verification services in your sales application.

> **Note:** Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) is the new name for Data as a Service (DaaS).

Prerequisites

Before you start, you must:

- Set up the DaaS service in the Oracle Cloud Dashboard.
- Copy the URL of the DaaS instance.
- Provision a user with the DATASERVICE CLIENT API APPID role.
- Add each service as a confidential application in Oracle Identity Cloud Service as described in the topic "Add a Confidential Application" in the Administering Oracle Identity Cloud Service guide.

  On the Client page of the Add Confidential Application wizard, in the Authorization section, select **Resource Owner**, **Client Credentials**, **Authorization Code**, and **Refresh Token** as Allowed Grant Types. Leave Redirect URL blank. If you use Basic Authentication, do not include the question mark special character (?) in the password.

You must enter the URL and user name and password to complete the integration in the Setup and Maintenance work area.

Integrate the D&B Enrichment with Your Sales Application

1. In the Setup and Maintenance work area, open the **Manage Integration with Oracle Data as a Service** task:
   - Offering: Sales
   - Functional Area: Integrations
   - Show: All Tasks
   - Task: Manage Integration with Oracle Data as a Service
2. In the Manage Integration with Oracle Data as a Service page, select the **OAuth Authentication** option.
3. In the **URL** field, enter the URL of the DaaS instance. Remove `/data/ui` from the end of the URL. Here's an example: `https://mydataservice-myidentitydomain.data.us2.oraclecloud.com`.

   If you didn't save the URL, you can find it in the welcome email and in Oracle Cloud Dashboard.

4. In the **Client ID** and the **Client Secret** fields, enter the values you obtained when you added the service as a confidential application in Oracle Identity Cloud Service.
5. Click **Save and Close**.

Integrate the Address, Email, and Phone Verification with Your Sales Application

Enter the same information in the Manage Integration with Oracle Address Verification page:

1. In the Setup and Maintenance work area, open the task **Manage Integration with Oracle Verification Services**:
    - Offering: Sales
    - Functional Area: Integrations
    - Show: All Tasks
    - Task: Manage Integration with Oracle Verification Services
2. In the Manage Integration with Oracle Verification Services page, select the **OAuth Authentication** option.
3. In the **URL** field, enter the URL of the verification service instance. Remove `/data/ui` from the end of the URL. Here's an example: `https://mydataservice-myidentitydomain.data.us2.oraclecloud.com`.

   If you didn't save the URL, you can find it in the welcome email and in Oracle Cloud Dashboard.
4. In the **Client ID** and the **Client Secret** fields, enter the values you obtained when you added the service as a confidential application in Oracle Identity Cloud Service.
5. Click **Save and Close**.

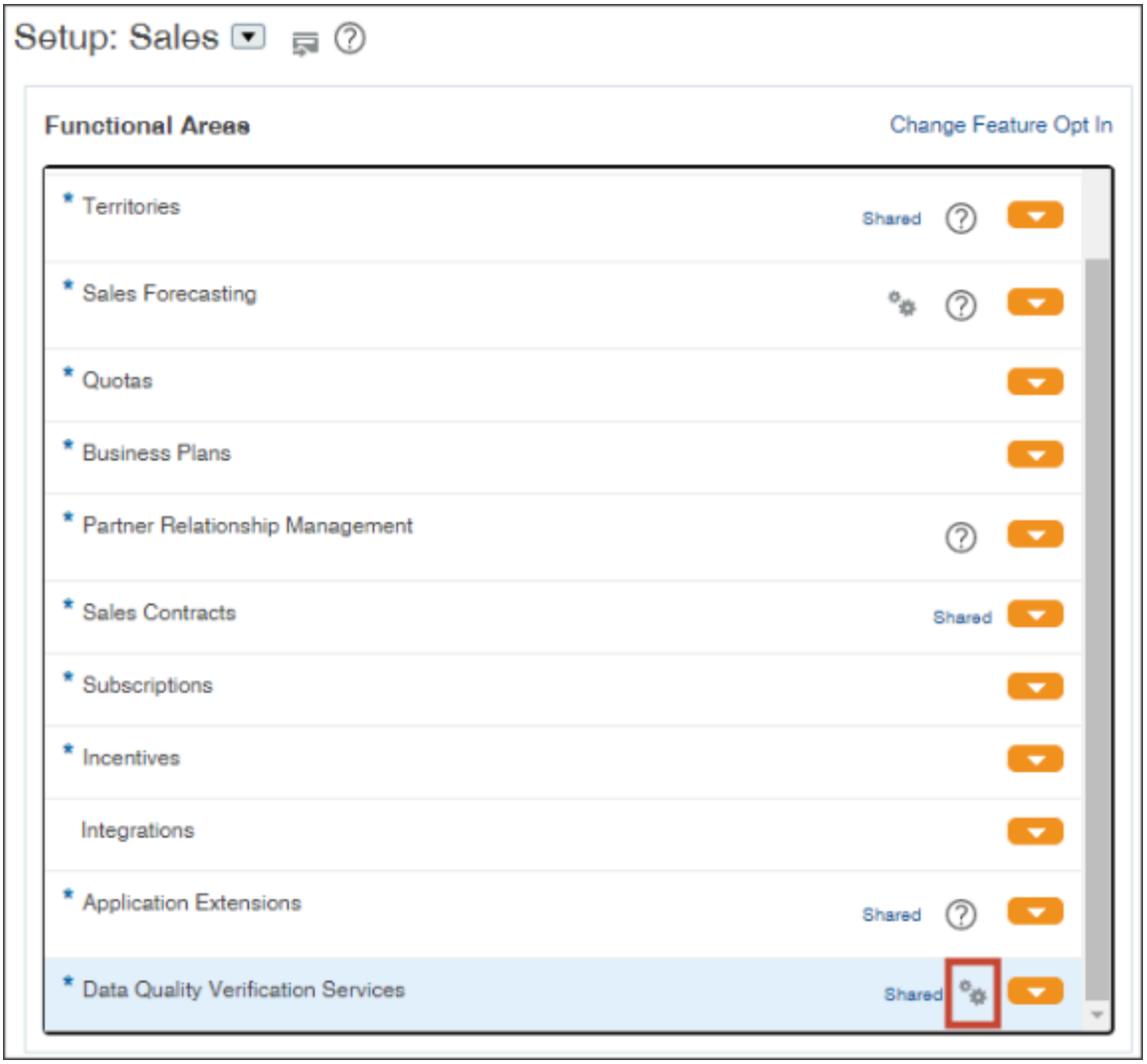
Related Topics

Enable the Verification of Addresses, Emails, and Phone Numbers

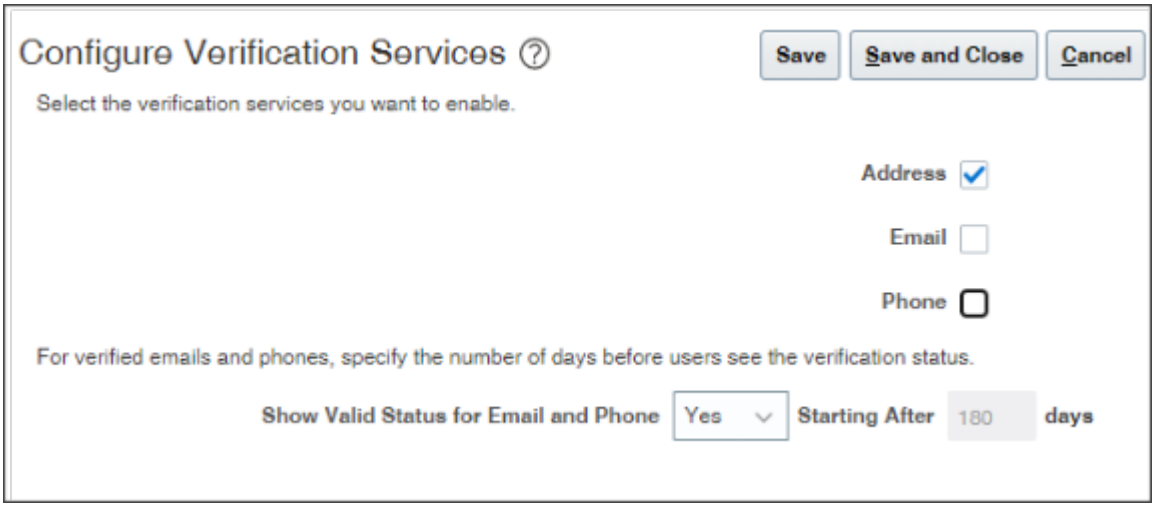
After you enter the integration information, you enable the verification services that you want to use. Here's the easiest way, using the Quick Setup page provided for this purpose:

1. In the Setup and Maintenance work area, open the **Sales** offering.

2. In the Functional Areas section, the left pane of the page, scroll down to the **Data Quality Verification Services**, and click **Quick Setup** (the gears icon highlighted in the screenshot).



3. In the Configure Verification Services page, select the verification services you want to enable. Address is enabled by default.



4. Using **Show Valid Status for Email and Phone** field, you can specify if and when users see the status of Valid for verified phone numbers and emails.

   Users see right away if the email address or phone number they enter are invalid, but they don't see a Valid status until later. By default, the Valid status displays after 180 days. Displaying the status makes it possible for users to verify the information again. In 6 months, the contact may be gone; the number may have changed.

   a. To enable or disable the display of the Valid status, select **Yes** or **No**.
   b. If you selected **Yes**, then enter the number of days before users see the Valid status.

5. Click **Save and Close**.

Note: Using the Quick Setup page is the equivalent of setting the following profile options using the Manage Administrator Profile Values task:

- Email Verification Service Enabled (ORA_ZCH_EMAIL_VERIFICATION)
- Phone Verification Service Enabled (ORA_ZCH_PHONE_VERIFICATION)
- Phone and Email Status Validity (ORA_ZCH_PHONE_EMAIL_STATUS_VALIDITY)

Related Topics

- Enrichment and Verification You Can Start Using Right Away
- Integrate the Account Enrichment and Verification Services
- How do I verify email addresses and phone numbers?

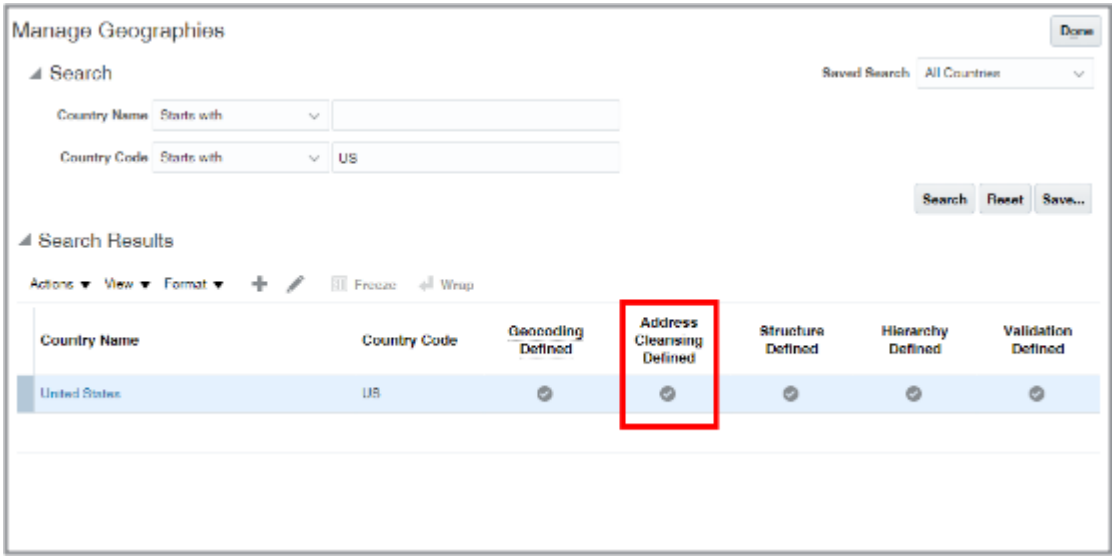
Enable the Verify Address Button

If your salespeople are diligent in using the search field to enter addresses, you can skip this step. Addresses added using search are already verified. The Verify Address button is only useful if you want to check that the accuracy of addresses entered manually or if you imported unverified addresses. You can enable the button only for countries you imported earlier.

Repeat these steps for each of the countries where you want the button. You can only enable the button for country geographies you imported.

1. Open the **Manage Geographies** task from the Setup and Maintenance work area:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Geographies
2. On the Manage Geographies page, search for each country you imported using either its name or its two letter ISO code. For example, enter either United States or US, and click **Search**.
3. Select the country in the Search Results area.
4. Click **Go to Task** (the circular icon) in the **Address Cleansing Defined** column.

   Here's a screenshot of the Manage Geographies page highlighting the Go to Task icon and the Address Cleansing column.



5. In the Address Cleansing Level window, select Optional for Real-Time Address Cleansing Level.



6. Click **Save and Close**.

Add Enriched Fields to the UI

Review the List of Additional Account and Contact Attributes

Review the list of mapped and unmapped account and contact information you can expose in the UI. You can expose the mapped fields in the UI using Application Composer. For the unmapped fields, you must first create a custom field for it in the sales application and add the field to the mapping.

Mapped Account Fields

You can expose any of the fields listed in the table in the account pages using the display name. Long field names aren't always completely visible in Application Composer, but you can hover over a display name to see the underlying technical name.

The table lists the name of the Oracle Account Enrichment attribute in the first column, and provides a brief definition and description. The Account Field Display Name field lists the display name in the UI and in Application Composer. The Account Field Name lists the technical name. The names don't always match.

Oracle Account Enrichment Attribute	Definition	Description	Account Field Display Name	Account Field Name
Data/DataCloudStatus	Data Cloud Status	Indicates if the record has been matched.	Enrichment Status	DataCloudStatus
Data/ PrefFunctionalCurrency	Currency	A code value that describes the type of currency in which the sales volume (local currency) is expressed.	Preferred Functional Currency	PrefFunctionalCurrency
Data/ CurrFyPotentialRevenue	Sales Volume (Local currency)	The total annual sales revenue in US dollars as a signed, decimal field. If the revenue is collected in local currency, then the local value is converted to US dollars.	Current Fiscal Year's Potential Revenue	CurrFyPotentialRevenue
Data/ DomesticUltimateDunsNum	Domestic Ultimate DUNS Number	A subsidiary within the global family tree that is the highest-ranking member within a specific country. May contain leading zeros, which will be lost if the field is treated as numeric.	Domestic Ultimate D-U-N-S Number	DomesticUltimateDunsNumC
Data/DunsNumberC	DUNS Number	A randomly generated 9-digit number assigned by Dun & Bradstreet Corporation to identify	D-U-N-S Number	DunsNumberC

Oracle Account Enrichment Attribute	Definition	Description	Account Field Display Name	Account Field Name
		unique business establishments. May contain leading zeros, which will be lost if the field is treated as numeric.		
Data/GlobalUltimateDunsNumC	Global Ultimate DUNS Number	The top-most responsible entity within the corporate family tree. May contain leading zeros, which will be lost if the field is treated as numeric.	Global Ultimate D-U-N-S Number	GlobalUltimateDunsNumC
Data/ParentDunsNumC	Parent DUNS Number	The D-U-N-S number of the parent organization. May contain leading zeros, which will be lost if the field is treated as numeric.	Parent D-U-N-S Number	ParentDunsNumC
Data/EmpAtPrimaryAdrEstInd	Number of Employees (This Site)	The number of employees at this location.	Employees at Identifying Address	EmployeesAtPrimaryAddressText
Data/EmpAtPrimaryAdrEstInd	Employees Here Reliability Code	Describes the reliability of the Employees Total value.	Number of Employees at Identifying Address	EmployeesAtPrimaryAddress
Data/EmpAtPrimaryAdrMinInd	Employees Primary Minimum Indicator	A code value that describes the reliability of the Employees Total value.	Number of Employees at Identifying Primary Address Minimum	EmployeesAtPrimaryAddressMinimum
Data/EmployeesTotal	Employees Total	The total number of employees in the business organization; it should include subsidiary and branch locations.	Number of Employees	EmployeesTotal
Data/TotalEmpEstInd	Employees Total Reliability Code	Describes the reliability of the Employees Total value. The possible values are: Actual, Estimated, and blank.	Number of Employees Estimated Qualifier	TotalEmployeesEstimatedIndicator
Data/TotalEmpMinInd	Employees Total Minimum Indicator	Displays the reliability of the Employees Total value. The possible values are: Includes Subsidiaries, Subsidiaries not included, and blank.	Number of Employees at Identifying Address Minimum Qualifier	TotalEmployeesMinimumIndicator
Data/ImportInd	Import Indicator	A code value that identifies whether the business imports goods or services	Importer Indicator	ImportInd

Oracle Account Enrichment Attribute	Definition	Description	Account Field Display Name	Account Field Name
		for remanufacture or sale, exports products or services to a foreign country, or is an agent for goods.		
Data/ExportInd	Export Indicator	A code value that identifies whether the business imports goods or services for remanufacture or sale, exports products or services to a foreign country, or is an agent for goods.	Exporter Indicator	ExportInd
Data/LegalStatusCode	Legal Status Code	A code value that describes the legal structure of the business.	Legal Status	LegalStatusCode
Data/LineOfBusiness	Line of Business	A description of the operations or activities of the business. Relates to the primary four-digit 1987 US SIC.	Line of Business	LineOfBusiness
Data/MinorityOwnedInd	Minority Owned Indicator	Whether or not the business is owned by a member of a minority group.	Minority-Owned Indicator	MinorityOwnedInd
Data/MinorityOwnedType	Minority Owned Type	Indicates the ethnicity of the minority holding an ownership interest.	Type of Minority-Owned Organization	MinorityOwnedType
Data/RentOwnInd	Owns Rents Code	A code value that indicates if the business owns or rents the building it occupies.	Rent or Own Indicator	RentOwnInd
Data/ PublicPrivateOwnershipFlag	Public Private Indicator	Whether or not ownership of the business is public or private.	Private Ownership	PublicPrivateOwnershipFlag
Data/SmallBusInd	Small Business Indicator	Indicates if the business meets SBA certification eligibility criteria effective July 1, 1999. All firms must be certified by one of the Small Disadvantaged Business Certification Agencies.	Small Business Indicator	SmallBusInd

Oracle Account Enrichment Attribute	Definition	Description	Account Field Display Name	Account Field Name
Data/ParentSubInd	Subsidiary Status	Whether or not the subject business is more than 50-percent owned by another organization.	Subsidiary Indicator	ParentSubInd
Data/YearStarted	Year Started	The year when the current ownership or management assumed control of the business or the year established if no control change has taken place. This is not provided for branch records.	Year Established	YearEstablished
Data/LocationType	Location Type	A code value that describes the organizational status of the business; for example, Single Location, Headquarters, Branch.	HQ Branch Indicator	HQBranchIndicator
Data/FederalTaxIDNumber	Federal Tax ID Number	A number assigned by the Internal Revenue Services (IRS) that either uniquely identifies or helps to identify a subject, also referred to as Federal Taxpayer Identification Number.	Taxpayer Identification Number	JgzzFiscalCode
Data/PrimaryAddressLine1	Street Address 1	The first street address line where a business is physically located. Generally in local language.	Address Line 1	PrimaryAddressLine1
Data/PrimaryAddressLine2	Street Address 2	The second street address line where a business is physically located. Generally in local language.	Address Line 2	PrimaryAddressLine2
Data/PrimaryCity	City	City where the business is located. Generally in local language.	City	PrimaryAddressCity
Data/PrimaryCounty	County	The full name of the county where the business is located.	County	PrimaryAddressCounty
Data/PrimaryState	State	The full name of the state where the business is located.	State	PrimaryAddressState

Oracle Account Enrichment Attribute	Definition	Description	Account Field Display Name	Account Field Name
Data/PrimaryPostalCode	OSC Postal Code	The 5-digit postal code where the business is physically located.	Postal Code	PrimaryAddressPostalCode
Data/PrimaryCountry	Country	The 2-byte alpha character ISO code for the country where the business is located.	Country	PrimaryAddressCountry
Data/RawPhoneNumber	Phone Number	The primary phone number for the business with no formatting or punctuation. This string contains all telecommunication number components (area code, exchange, number).	Primary Phone Number	PrimaryPhoneNumber
Data/ FaxRawPhoneNumber	Facsimile Number	The primary facsimile number for the business with no formatting or punctuation. This string contains all telecommunication number components (area code, exchange, number).	Fax	Fax
Data/Url	Url	The primary URL for the company.	URL	PrimaryURL
Data/WomanOwned	Woman Owned	A business that is at least 51-percent owned by, and whose management and daily business operations are controlled by, a woman.	Woman-Owned Indicator	WomanOwnedInd

Unmapped Account Fields

You must create a text or a number field for these attributes and add them to the mapping before you can expose the field in the account pages.

The table lists the name of the attribute on the mapping page in the first column, and provides a brief definition and description. The Geographical Availability column indicates if the attribute is available for all countries or just a subset.

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
Data/State Name	State Name	The full name of the physical state or province name where the business is located.	Global

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
Data/PrimaryFullPostalCode	Full Postal Code	Full postal code as received by Dun & Bradstreet Corporation.	Global
Data/LatitudeShort	Latitude Short	The angular distance north or south from the earth's equator measured through 90 degrees. Note: This is a less granular view of the Latitude field.	Canada, Germany, UK, US, Mexico, Vietnam, Belgium, Australia, Netherlands, Republic of Korea
Data/LongitudeShort	Longitude Short	The angular distance east or west from the prime meridian measured through 180 degrees. Note: This is a less granular view of the Longitude field.	Canada, Germany, UK, US, Mexico, Vietnam, Belgium, Australia, Netherlands, Republic of Korea
Data/MailingFullPostalCode	Mailing Full Postal Code	Full postal code as received by Dun & Bradstreet Corporation.	Global
MetaData/MatchScore	Match Score	A score representing the likelihood of a match between records.	Global
Data/CompanyDescription	Company Description	Narrative company description.	Global
Data/MarketableIndicator	Marketability Indicator	Indicates that the record satisfies Dun & Bradstreet Corporation global marketability rules.	Global
Data/GEOCodeAccuracy	GEO Code Accuracy	A code value that describes how close the coordinates for a location are to a rooftop level.	Global
Data/ SalesVolume(USDollars)ReliabilityCode	Sales Volume (US Dollars) Reliability Code	A code value that describes the reliability of the annual sales/ revenue figure that is expressed in US dollars.	Global
Data/SalesVolume(LocalCurrency)	Sales Volume US Dollars	The total annual sales revenue for this business in local currency. Not available on branch locations.	Global
Data/ SalesVolumeLocalCurrencyReliabilit	Sales Volume Local Currency Reliability Code	A code value that describes the reliability of the annual sales/ revenue figure that is expressed in local currency.	Global
Data/ DomesticUltimateBusinessName	Domestic Ultimate Business Name	The primary name of the domestic ultimate business.	Global

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
Data/DomesticUltimateFIPSCountryCode	Domestic Ultimate FIPS Country Code	The Federal Information Processing Standards code value that identifies the country where the domestic ultimate company is located.	Global
Data/DomesticUltimateD&BCountryCode	Domestic Ultimate D&B Code	Dun & Bradstreet Corporation geographical code identifying the country where the domestic ultimate is located.	Global
Data/DomesticUltimateState/ProvinceAbbreviation	Domestic Ultimate State Province Abbreviation	The abbreviated name of the state or province in which the domestic ultimate is located.	Global
Data/GlobalUltimateBusinessName	Global Ultimate Business Name	The name of the ultimate company.	Global
Data/GlobalUltimateIndicator	Global Ultimate Indicator	Indicates whether the site record is the Global Ultimate D-U-N-S within the corporate family tree.	Global
Data/GlobalUltimateFIPSCountryCode	Domestic Ultimate FIPS Country Code	The Federal Information Processing Standards code value that identifies the country where the domestic ultimate company is located.	Global
Data/GlobalUltimateD&BCountryCode	Domestic Ultimate D&B Country Code	Dun & Bradstreet Corporation geographical code identifying the country where the domestic ultimate is located.	Global
Data/GlobalUltimateState/ProvinceAbbreviation	Global Ultimate State Province Abbreviation	The abbreviated name of the state or province in which the global ultimate is located.	Global
Data/HeadquarterDUNSNumber	Headquarter DUNS Number	The D-U-N-S number of the headquarter organization. May contain lead zeros, which will be lost if field is treated as numeric.	Global
Data/Parent/HeadquarterBusinessName	Parent Headquarters Business Name	The primary name of the parent headquarters company.	Global
Data/HierarchyCode	Hierarchy Code	A number used with the status and subsidiary indicators to pinpoint the location of an establishment within a corporate hierarchy. The hierarchy on the global ultimate is '01'. A branch hierarchy is the same	Global

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
		as its headquarters'. A subsidiary's hierarchy is one more than its parent's.	
Data/NumberofFamilyMembers	Number of Family Members	The number of family members including the global ultimate and all subsidiaries and branches of the entire family tree worldwide. All family members within a particular tree carry the same count.	Global
Data/OutofBusinessIndicator	Out of Business Indicator	Indicates that the business is out of business or inactive based upon D&B policies and procedures.	US only
Data/ OvertheCounterStockExchange	Over the Counter Stock Exchange	The symbol used to trade the company's stock on the Over the Counter Stock Exchange.	US only
Data/NYSEStockExchange	NYSE Stock Exchange	The symbol used to trade the company's stock on the New York Stock Exchange.	US only
Data/ASETicker	ASE Ticker	The symbol used to trade the company's stock on the American Stock Exchange.	US only
Data/NMSTicker	NMS Ticker	The symbol used to trade the company's stock on the NASDAQ National Market.	US only
Data/NASTicker	NAS Ticker	The symbol used to trade the company's stock on the NASDAQ Small Cap Exchange.	US only
Data/ OperatesFromResidenceIndicator	Operates From Residence Indicator	Operates From Residence Indicator	US only
Data/PrimaryCompetitor1	Primary Competitor 1	DUNS number of the company deemed to be the primary competitor for the business.	Global
Data/3YearGrowthPercentageonSal	3 Year Growth Percentage on Sales Volume	The percentage increase or decrease in the sales volume over a three-year period. Includes a plus (+) or minus (-) sign denoting positive or negative growth in sales.	US only
Data/3YearGrowthPercentageonEm	3 Year Growth Percentage on Employees	The percentage increase or decrease in the number of	US only

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
		employees over a three-year period. Includes a plus (+) or minus (-) sign denoting positive or negative growth in sales.	
Data/DeliquencyRisk	Delinquency Risk	Based on the standard Commercial Credit Score, which predicts the likelihood of a company becoming severely delinquent over the next 12 months. Grouped into risk ranges.	US only
Data/CensusFIPSTerritoryCode	Census FIPS Territory Code	The Federal Information Processing Standards territory code for where this subject is located. These territory codes are defined and developed by the National Institute of Standards and Technology (NIST) organization within the US federal Department of Commerce.	US only
Data/CensusFIPSCountyCode	Census FIPS Country Code	The Federal Information Processing Standards county code identifying the county where the subject is located.	US only
Data/PrimaryCompetitor2	Primary Competitor 2	DUNS number of the company deemed to be the second primary competitor for the business.	Global
Data/PrimaryCompetitor3	Primary Competitor 3	DUNS number of the company deemed to be the third primary competitor for the business.	Global
Data/SecondaryCompetitor1	Secondary Competitor 1	DUNS number of the company deemed to be the secondary competitor for the business.	Global
Data/SecondaryCompetitor2	Secondary Competitor 2	DUNS number of the company deemed to be the secondary competitor for the business.	Global
Data/GlobalExchangeName	Global Exchange Name	The exchange where the stock symbol is listed.	Global
Data/PrimaryIndicator	Primary Indicator	Indicates whether or not the ticker is the primary one for the business.	Global
Data/NationalIdentificationCode	National Identification Code	A code value that describes the type of national ID number	Global

Oracle Account Enrichment Attribute	Definition	Description	Geographical Availability
		provided; for example, '12' = CRO, '14' = Siren.	
Data/FIPSMSACode	FIPS MSA Code	The Federal Information Processing Standards code value, which identifies the Metropolitan Statistical Area (known as the MSA) where this subject is located. These MSA codes were defined and developed by the National Institute of Standards and Technology (NIST) organization within the US Federal Department of Commerce.	US only
Data/ ParentHeadquarterD&BCountryCod	Parent Headquarters D&B Country Code	Dun & Bradstreet Corporation geographical code identifying the country where the parent headquarters are located.	Global

Mapped Contact Fields

You can expose any of the fields listed in the table in the contact pages using the display name. Long field names aren't always completely visible in Application Composer, but you can hover over a display name to see the underlying technical name.

The table lists the name of the attribute on the mapping page in the first column, and provides a brief definition and description. The Contact Field Display Name field lists the display name in the UI and in Application Composer. The Contact Field Name lists the technical name. The names don't always match.

Oracle Contact Enrichment Attribute	Definition	Description	Contact Field Display Name	Contact Field Name
Data/DataCloudStatus	Data Cloud Status	The status of the record. Example: Matched.	Enrichment Status	DataCloudStatus
Data/ PersonPreNameAdjunct	Prefix	The prefix (Mr., Ms., Dr.) associated with the person's name.	Prefix	PersonPreNameAdjunct
Data/PersonFirstName	First Name	The first name of the person.	First Name	PersonFirstName
Data/PersonMiddleName	Middle Name	The middle name of the person.	Middle Name	PersonMiddleName
Data/PersonLastName	Last Name	The last name of the person.	Last Name	PersonLastName
Data/JobTitle	Title	The title associated with the person's role. This is the	Job Title	JobTitle

Oracle Contact Enrichment Attribute	Definition	Description	Contact Field Display Name	Contact Field Name
		title as it would read on a person's business card.		
Data/PersonNameSuffix	Suffix	The last name suffix of the person.	Suffix	PersonNameSuffix
Data/Address1	Street Address 1	The first street address line where a business is physically located. Generally in local language.	Address Line 1	PrimaryAddressLine1
Data/City	City	City where the business is located. Generally in local language.	City	PrimaryAddressCity
Data/State	State	The abbreviation for the physical state or province name where the business is located.	State	PrimaryAddressState
Data/PostalCode	OSC Postal Code	The 5-digit postal code where the business is physically located.	Postal Code	PrimaryAddressPostalCode
Data/Country	Country	The 2-byte alpha character ISO code for the country where the business is located.	Country	PrimaryAddressCountry
Data/ PhoneRawPhoneNumber	Direct Dial Phone	The direct-dial phone number associated with this person in this role. It includes country code, area code and phone number.	Phone Number	PrimaryFormattedPhoneNumber
Data/CompanyPhone	Company Phone	The company phone number at which the professional can be reached (for current role assignments).	Phone Number	PrimaryPhoneNumber
Data/PhoneExtension	Company Phone Extension	This is the phone extension associated with the company phone number indicated on this record.	Phone Extension	PrimaryPhoneExtension
Data/EmailAddress	Email Address	The main email address associated with this person's role or contact record.	Email	Email

Oracle Contact Enrichment Attribute	Definition	Description	Contact Field Display Name	Contact Field Name
Data/Department Department	Department	A division of a large organization such as Executive, Administration, and so on.	Department	Department

Unmapped Contact Fields

You must create a text or a number field for these attributes and add them to the mapping before you can expose the field in the contact pages.

The table lists the name of the attribute on the mapping page in the first column, and provides a brief definition and description. The Geographical Availability column indicates if the attribute is available for all countries or just a subset.

Oracle Contact Enrichment Cloud Service Attribute	Definition	Description	Geographical Availability
Data/FullPostalCode	Full Postal Code	Full postal code as received by Dun & Bradstreet Corporation.	Global
DataDUNSNumber	DUNS Number	The D-U-N-S number of the business location.	Global
Data/IndividualID	Individual ID	The unique identifier of the professional.	US only
Data/RoleID	Role ID	Unique identifier of the professional's job at a particular DUNS location.	US only
Data/LastUpdateDateRole	Last Update Date Role	The date any of the role data was last updated.	Global
Data/ManagementLevel	Management Level	Level of management; for example, C-Level, VP-Level, and so on.	Global
Data/StandardizedTitle	Standardized Title	A business title derived from the Management Responsibility Code, which identifies a title or area of responsibility of an executive.	Global
MetaData/MatchScore	Match Score	A score representing the likelihood of a match between records.	Global
Data/Location	Location	Address information for individual.	US only

Create the Fields for Any Unmapped Information

Here's an outline of how you can create text and number fields for any of the unmapped information that you want to display in the UI. You can get more details about creating fields in the Oracle Applications Cloud Configuring Applications Using Application Composer guide.

1. Ensure that you're working in a sandbox.
2. Click **Navigator** > **Configuration** > **Application Composer**.
3. Make sure **CRM Cloud** is selected in the **Application** field and expand **Standard Objects**.
4. Expand **Account** or **Contact**.
5. Click **Fields**.
6. In the Custom tab, click the **Create a custom field** icon.
7. Select **Text** or **Number** and click **OK**.
    - Here are the guidelines for creating a text field:

Property	Description
Display Label	Enter the text users see.
Display Width	Character width for the text field. The default is 30.
Display Type	Determines the type of text field displayed to the users. You can choose Simple Text Box that is a single-line text field, or Multiline Text Area, a larger text area that spans multiple lines.
Name	The unique identifier for the field that you add to the mapping. The application enters a name for you, but it's a good idea to change the name to match the field you're mapping.
Description	Optional description of the object. This field is used for internal purposes.
Required	Leave deselected. The field isn't required.
Updatable	Leave selected.
Searchable	Indicates whether to make the field available for selection as additional search criteria in the Add Fields list in Advanced Search mode.
Depends On	Leave blank.
Fixed Value	Leave selected and blank.

Property	Description

- Here are the guidelines for creating a number field:

Property	Description
Display Label	Enter the text users see.
Display Width	Leave blank.
Name	The unique identifier for the field that you add to the mapping. The application enters a name for you, but it's a good idea to change the name to match the field you're mapping.
Description	Optional description of the object. This field is used for internal purposes.
Required	Leave deselected. The field isn't required.
Updatable	Leave selected.
Searchable	Indicates whether to make the field available for selection as additional search criteria in the Add Fields list in Advanced Search mode.
Indexed	Indexing a field for search improves search performance.
Maximum Length	Leave the default value.
Minimum Value	Leave blank.
Decimal Places	Leave at 0.
Depends On	Leave blank.
Fixed Value	Leave selected and blank.

8. Click **Save and Close**.

Add Enriched Fields to the Account and Contact Pages

Here's how to add enriched fields to the Profile tab in the Edit Account and Edit Contact pages in CX Sales. You can use the same process to add the fields to other CX Sales pages as well.

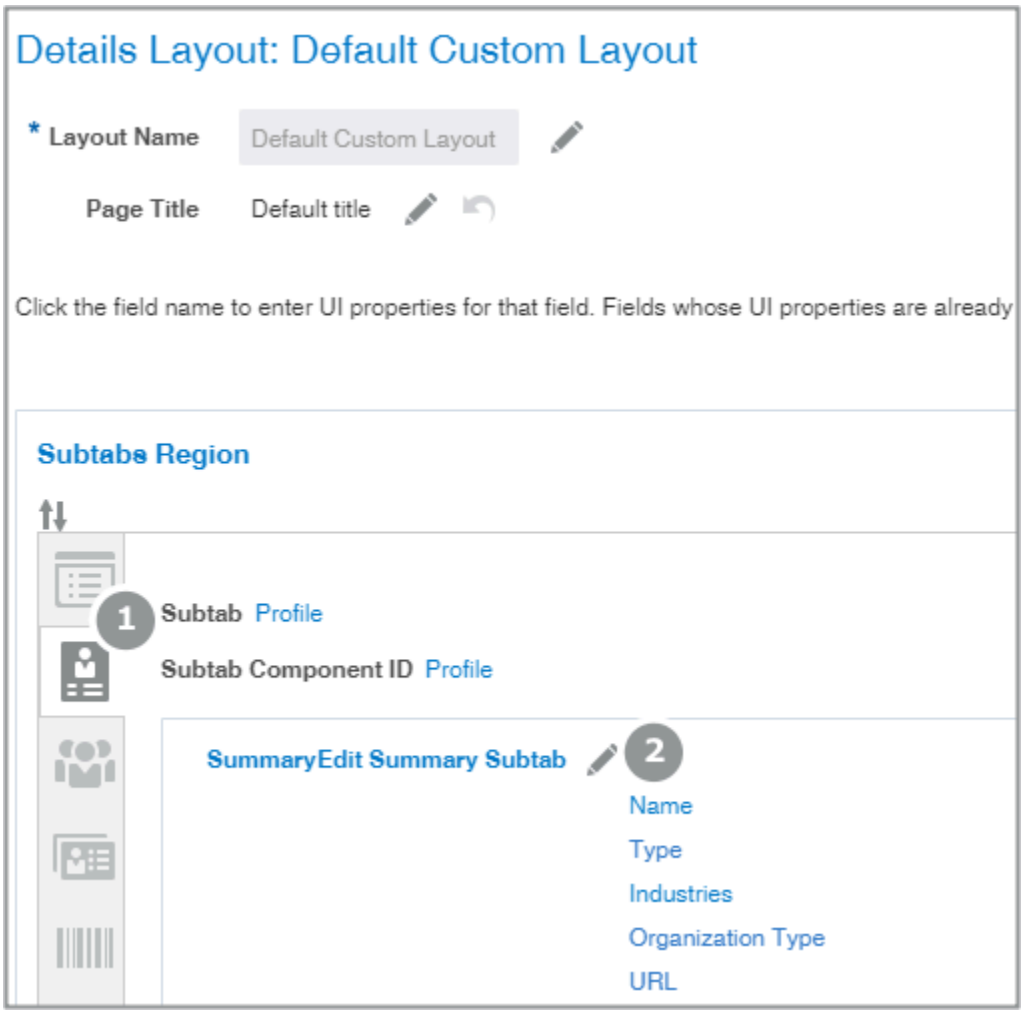
If you're adding the fields to the Digital Sales UIs, then you must use VB Studio instead of Application Composer and follow the example topic, "Add a Custom Field to the Edit Contact Page", in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative.

1. Create and activate a sandbox.
2. Navigate to **Configuration** > **Application Composer**.
3. With the **Account** or **Contact** object selected in Application Composer, click **Pages**.

4. Expose the field on the Profile tab on the Edit Account or Edit Account page.

   Note: The "Edit" pages are called "Details" pages in Application Composer.

   a. Scroll to locate the Details Page Layouts and open a custom layout or create one by duplicating the default layout.
   b. Click the **Profile** subtab (callout 1 in the screenshot).
   c. In the Summary Subtab section, click **Edit** (callout 2).



   d. Scroll down in the **Available Fields** column to locate the field and move it to the **Selected Fields** column.
   e. Use the arrow buttons to move the field where you want it
   f. Click **Save and Close**.

      You are returned to the Layout page, which reflects your changes.
   g. Click **Done**.

      You are returned to the Application Composer page.

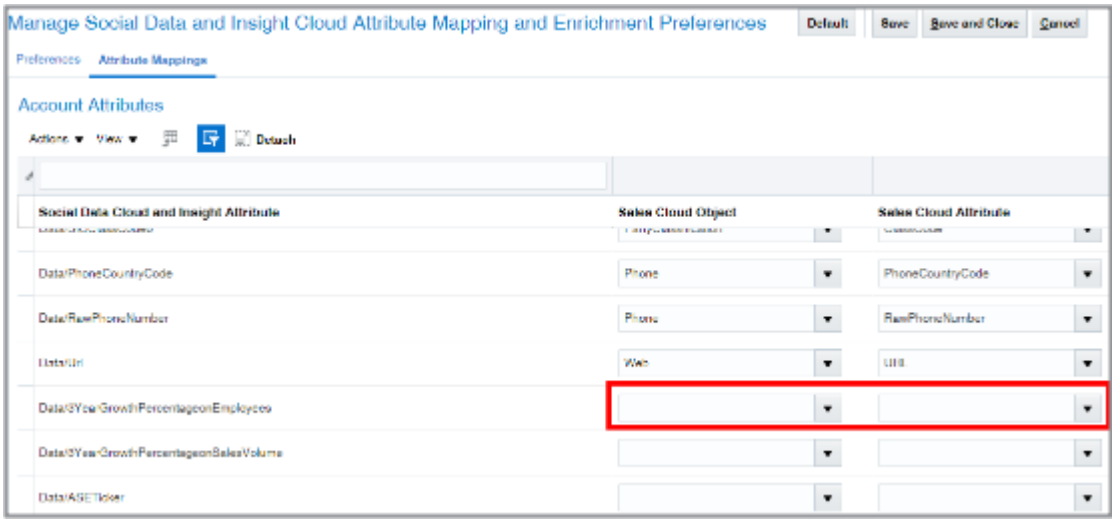
5. Review the pages where you added the fields:
    a. With the sandbox still open, click **Home**.
    b. Open the Account or Contact work area.
    c. Review each of the pages to make sure the fields are where you want them.
6. Publish the sandbox.

Add Fields to the Mapping

Here's how to add fields to the mapping:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Accounts and Contacts
    - Show: All Tasks
    - Task: Manage Oracle Data as a Service Attribute Mapping and Preferences
2. Click the **Attribute Mappings** tab.

    On the Attribute Mappings tab, there are two sections: Account Attributes and Contact Attributes.
3. In the appropriate section, find the field you want to map in the **Social Data Cloud and Insight Attribute** column.



4. In the **Sales Cloud Object** column, select **Account** from the list.
5. In the **Sales Cloud Attribute** column, select the sales field you want to map.
6. When you complete mapping all of the fields, click **Save and Close**.

Configure Enrichment Preferences

Specify if you want to enable enrichment of accounts, contacts, or both, and configure enrichment preferences to define what data is updated in an enriched account or contact.

CAUTION: Ensure that you configure attribute mappings before you start configuring enrichment preferences.

1. Click **Navigator** > **My Enterprise** > **Setup and Maintenance** work area.
2. Click the Tasks menu and click Search. Search for Manage Oracle Data as a Service Attribute Mapping and Preferences and open it.

   This page includes two tabs, one for accounts and another one for contacts. You can use these to enable enrichment for accounts and contacts, and configure the data that should be included in the enriched account.
3. Select **Account** or **Contact** to enable enrichment for accounts or contacts, respectively.
4. Enter a match threshold for accounts and contacts in the **Match Threshold** field.
5. Enter the maximum number of records that should be enriched in the **Maximum Number of Accounts for Real-Time Enrichment** and **Maximum Number of Contacts for Real-Time Enrichment** fields.
6. In case of contact enrichment, enter the maximum number of new contacts to create during enrichment in the **Maximum Number of New Contacts** field.
7. Map the source attributes with the required sales attribute. You can also select preferences for each attribute. For example, you can set an attribute to be displayed during real-time enrichment. Note that the preferences aren't available for child fields.

   Note: Click Reset to revert back to the default mapping and preferences.
8. Click **Save and Close**

If you have a preproduction or staging environment, then test the service association between your sales preproduction environment and your Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) subscription. You must limit testing to 500 records. When you go to production, do the service association between your production environments and your Oracle Account and Contact Enrichment by Dun & Bradstreet (D&B) production environment. The service association steps are the same, but the test and production service URLs are different. The service URLs are listed in your welcome email and in the Unified Console application.

31 Computer Telephony Integration (CTI)

Overview of Computer Telephony Integration (CTI) in Digital Sales

Computer telephony integration (CTI) enables integration of third party media toolbars. You can display a media toolbar by enabling the Partner CTI Service, and by giving your signed-in users the Access Partner Media Toolbar privilege which allows access to the toolbar.

> **Note:** If your users have the standard Sales job roles, you don't need to add the Access Partner Media Toolbar privilege.

Use CTI to:

- Receive phone calls on the Digital Sales app and automatically view the caller's contact record or lead record.
- Make an outbound call using Click to Dial and skip manual dialing.

Integrating with CTI gives you the following features:

- Notifications of incoming calls and ability to accept or reject the call
- Automatic caller identification
- Ability to search for a contact
- Optional caller verification
- Display of predefined screen pop with caller or service details
- Automatic interaction recording
- Call wrap up

Prerequisite Setup

First ensure that the Service offering is enabled, and then that the Redwood user interface is enabled. You enable the Redwood user interface through the Service application whether you're using Sales or Service Center.

1. Sign in to CX Sales or Service as an administrator or setup user.
2. Navigate to **My Enterprise > Offerings**.
3. Click the **Opt In Features** button.
4. From the Opt In: Service screen, locate the **Redwood User Interface for Service** option and make sure that it's enabled.
5. Verify all the child items are also enabled.
6. Click **Done** on the Opt In page, then click **Done** again.

Configure Profile Options to Enable Partner Media Toolbar

The profile option SVC_PARTNER_MEDIA_TOOLBAR_ENABLED controls the visibility of the partner media toolbar. If you don't enable the profile option, the partner media toolbar is hidden. You can set this profile option either at a site level or at a user level.

To configure the profile options for enabling the partner media toolbar:

1. Navigate to the Setup and Maintenance work area and open the Tasks panel tab.
2. Click **Search** from the list of displayed tasks.
3. In the **Search** field, type `Manage Admin`.
4. From the displayed list of tasks, click **Manage Administrator Profile Values**.
5. In the Manage Administrator Profile Values page, navigate to the Search: Profile Option region.
6. In the Profile Option Code field, type `SVC_PARTNER_MEDIA_TOOLBAR_ENABLED`.
7. Click **Search**.

   The Search Results: Profile Options region displays the list of profile options.
8. In the Profile Values region, specify the values in the **Profile Value** column for the **Site** Profile Level to 'Yes' if you want the partner media toolbar to be visible to all users.
9. Alternatively, set the Site level value to 'No' and add a new row for a user for whom the partner media toolbar must be visible.
10. Click **Save and Close**.

Note: Ensure that the user is assigned the privilege `Access Partner Media Toolbar` (`SVC_ACCESS_PARTNER_MEDIA_TOOLBAR_PRIV`) before trying to access the toolbar.

How do I configure Multichannel Architecture (MCA) profile options?

Profile options let you configure and control application data centrally. Use the Multichannel Architecture (MCA) profile options to manage the MCA runtime profile option values. Administrators and setup users manage MCA profile options in the Setup and Maintenance work area.

To configure the MCA Profile Options:

1. In the Setup and Maintenance work area, go to the following:
   - Offering: Service
   - Functional Area: Communication Channels
   - Task: Manage MCA Profile Options
2. Click the name of the profile option you want to set.

This displays the **Manage MCA Profile Options** page for the selected profile option code.

3. In the Profile Values section for the profile option code, set the **Profile Value** for the Site **Profile Level**.
4. In the selected profile value, click the **New** icon to add a profile value.
5. Click **Save** or **Save and Close** to save the configuration.

MCA Profile Options

The following table lists the various MCA profile options that you can configure:

Profile Option	Description
SVC_MCA_DISABLE_JWT	Enables or disables the JSON Web Token generation.
SVC_MCA_DISABLE_OUTBOUND_CONTACT_VERIFY	Enables or Disables automatic display of contact verification screen for outbound calls. If enabled, it will override the call flow parameter configurations.
SVC_MCA_DISABLE_OUTBOUND_WRAP_UP	Enables or disables automatic display of the wrap-up screen for outbound calls. If enabled, it will override the call flow parameter configurations for wrap up. **Note:** For Digital Sales implementations, this setting must be enabled.
SVC_MCA_ENABLE_ENGAGEMENT_SYNC	Controls the in-focus chat interactions to be automatically associated with their screen popped tabs.
SVC_MCA_RECORD_ACTIVITIES_YN	Indicates whether activities must be logged for real time interactions. **Note:** For Digital Sales implementations, this setting must always be disabled (set to No).
SVC_MCA_RT_CHECK_EVENT_DISPATCH_INTERNAL_MS	Sets the number of milliseconds the user must wait for the start communication event. We recommend that you don't change this value unless instructed by Oracle Support.
SVC_MCA_RT_EVENT_DISPATCH_MAX_RETRIES	Sets the number of times the user must wait for reverse lookup to return before running the start communication event. We recommend that you don't change this value unless instructed by Oracle Support.
SVC_MCA_SHOW_CONTACT_ON_WRAP_UP	Indicates whether to show the contact information during the wrap up process.
SVC_OVERRIDE_PARTNER_TOOLBAR_SELECTION	This option allows user to override system default setting of the partner media toolbar. User can select other toolbars from the list of active toolbars.
SVC_OVERRIDE_PARTNER_TOOLBAR_SELECTION	Enables the administrator to override the default setting of the partner media toolbar. The administrator can select other toolbars from the list of active toolbars.
SVC_PARTNER_MEDIA_TOOLBAR_ENABLED	Controls the visibility of the partner media toolbar. If it's not enabled, the partner media toolbar is hidden.
SVC_TOOLBAR_DEBUG_MODE_ENABLED	Turns on the JavaScript logging messages for debugging toolbar-related issues.

CTI Media Toolbar APIs

Media toolbar APIs are a set of JavaScript functions delivered by Oracle to enable Computer Telephony Integration (CTI) partners to integrate their media toolbars with your application.

For information on the media toolbar APIs including details on each available API, see the Related Topics for the CTI Media Toolbar APIs topic in the Implementing Fusion Service guide.

Related Topics

- Overview of the Media Toolbar API

Create a CTI Toolbar for Redwood

Use this task to add a new Redwood toolbar.

1. Sign in as an administrator or setup user.
2. In the Setup and Maintenance work area, choose the following:
    - Offering: Service.
    - Functional Area: Communication Channels.
    - Task: Manage Media Toolbar Configuration.
3. In the Manage Media Toolbar Configuration screen, click the **Add (+)** icon.
4. In the Toolbar work area, do the following:
    - Name: Redwood Toolbar.
    - Layout: Redwood
    - Communication Panel URL: Paste the appropriate URL.
5. In the **Manage Media Toolbar Configuration** list, make sure the **Default** column entry is checked.
6. Click **Save and Close**.

Assign the CTI Toolbar

You can enable the toolbar at site level, meaning it's available to all your users, or you can assign the toolbar to just specific users.

1. In the Setup and Maintenance work area, click the **Tasks** icon, and then click the **Search** link.
2. Enter **Manage Administrator Profile Values** in the Search box and click **Search**.
3. Click the task link, and then in the Manage Administrator Profile Values work area, enter the following search string in the Profile Display name field: **%Partner%**.
4. In the Search results field you have two choices depending on how you want to assign the toolbar.
5. To enable the toolbar at the site level, do the following:
    a. Locate and select SVC_PARTNER_MEDIA_TOOLBAR_ENABLED profile option.

b. If there's a Site Profile Level entry, make sure the Profile Value is set to **Yes**. To disable the toolbar at the site level, set that value to **No**.
c. If there's no Site entry, click the **Add (+)** icon, and from the Profile Level drop down list, select **Site**, and then from the Profile Value drop down list, select **Yes**.

6. To enable the toolbar only for specific users, do the following:
   a. First, make sure the Site Profile Level value is set to **No**.
   b. Then, click the **Add (+)** icon, and from Profile Level drop down list, and select **User**.
   c. And finally, in the User Name field, enter the user's name.
7. When finished, click **Save and Close**.

Call Flow Parameter Settings

The call flow parameters determine the default and administrator-defined actions to be performed for a customer interaction. Customer interactions are calls with the customer in Digital Sales and calls or chats in Service Center. Administrator-defined settings override the default settings.

You can specify the settings listed in the following table:

Setting	Options	Description
Contact Required	**Yes/No**	Specifies whether the contact details of a customer must be displayed. **Note:** For Digital Sales implementations, you must select **No**. Select **No** if you're using Digital Sales.
Contact Verification	**Yes/No**	Specifies whether the customer details must be verified at the beginning of the call. **Note:** For Digital Sales implementations, you must select **No**.
Screen Pop	**Yes/No**	Specifies whether a screen pop page must be displayed. Select **Yes**.
Wrap Up	**Yes/No/Server Driven**	Specifies whether a customer interaction requires wrap up. Select the **Server Driven** option to get notified by the toolbar if an interaction must be wrapped up. **Note:** For Digital Sales implementations, this setting must always be enabled.

Deactivate Contact Verification

Contact verification allows a user to verify a caller against records already set up in the database prior to the exchange of sensitive information. In Digital Sales however, most inbound calls are related to sales opportunities where, for instance, a new lead may be calling about an inquiry. Given that the majority of calls are of this type, call verification isn't required.

1. Sign in to the application as an administrator or setup user.
2. In the Setup and Maintenance work area, go to the following:
    - Offering: Service
    - Functional Area: Communication Channels
    - Task: Configure Call Flow Parameters
3. In the **Default Settings** work area, click the following drop-down lists, and change the value of both to **No**.
    - Contact Required
    - Contact Verification
4. Click **Save and Close**.

Configure Seeded Interaction Outcome Values

By default, Interaction outcome values, such as Call answered, Positive outcome, include values that pertain both to Service users and to Sales users. To configure the list to show only outcomes valid to a Sales user, perform the following task.

1. Sign in to CX Sales as an administrator or setup user.
2. In the Setup and Maintenance work area, and choose **Sales** from the **Setup** drop down list.
3. Click the **Tasks** icon, then select **Search**.
4. In the Search field, enter **Manage Standard Lookups**, and click the task link in the results.
5. In the Manage Standard Lookups work area, enter ORA_SVC_MCA_RESOLUTION_CD in the Lookup Type field, then click **Search**.
6. Uncheck all values you don't want your users to see.
7. When you're finished, click **Save and Close**.

32 Key Performance Indicators (KPI)

About Key Performance Indicators (KPI)

Sales managers are always looking to boost sales by measuring performance and motivating their teams. The Digital Sales performance feature makes it possible for them to do both by setting up goals and contests.

Oracle provides a number of predefined key performance indicators (KPIs) that sales managers can use for creating goals and contests, but you can create your own by following the procedures described in this chapter. Here's a list of the KPIs provided by Oracle.

KPI Name	This KPI measures the...
Appointments Completed	Number of appointments completed.
Appointments Scheduled	Number of appointments scheduled.
Call Activities Completed	Number of call activities completed.
Calls Made	Number of calls completed.
Demos Completed	Number of demo activities completed.
Email Activities Completed	Number of email activities completed.
Emails Sent	Number of emails sent.
Leads Converted	Number of leads converted.
Opportunities Created	Number of opportunities created.
Opportunities Won	Number of opportunities won.
Revenue	Sum of the revenue for won opportunities.
Tasks Completed	Number of tasks completed.

View Details of Predefined KPIs

You can drill down to view basic, calculation, and statistical details as well as the filter conditions defined for each of the predefined KPIs. For example, follow these steps to see what is configured for the **Opportunities Won** KPI.

1. Navigate to **Digital Sales** > **Sales Performance**.
2. From the Sales Performance dashboard, click the Actions menu (3 vertical dots icon) located near the top right area of the dashboard.
3. Select **Manage KPI**.
4. From the Sales Performance KPI page, click **Opportunities Won** to view the details as outlined in this table.

Basic Details	Calculation Details	Conditions	Statistic Details
Name: Opportunities Won **Status**: Active **Description**: Measures the number of opportunities won.	**KPI Object**: Opportunity **Calculation Type**: Count **Credit Recipient**: Owner **Credit Date**: Close Date	**Filter Condition**: StatusCode = 'WON'	**Breakup Category**: Sales Channel

Attributes for Supported KPI Objects

The following table lists the attributes for each of the supported KPI objects:

KPI Object	Calculation Type	Credit Recipient	Credit Date	Sum Attribute	Breakup Category
Activity	• Count • Sum • Percentage	• Activity Created By • Checked-In By • Checked-Out By • Last Updated By • Owner ID • Submitted By	• Activity Creation Date • Check-In Time • Check-Out Time • Date • Due Date • End Date • Ends	Not applicable	• Activity • Direction • Outcome • Outlook • Partner Usage • Priority • Private • Status • Type
Interaction	• Count • Sum • Percentage	Owner Resource ID	• End Time • Start Time	Not applicable	• Channel Type • Direction • Status • Stripe Code

KPI Object	Calculation Type	Credit Recipient	Credit Date	Sum Attribute	Breakup Category
					• Substatus Code
Opportunity	• Count • Sum • Percentage	• Opportunity Created By • Opportunity Last Updated By • Owner	• Close Date • Date Budget Available • Opportunity Creation Date • Opportunity Last Updated Date • Timeline	• Amount • Best Case • Budget Amount • Expected Revenue • Need • Worst Case	• Budgeted • Decision Level • Estimated Deal Duration • Include in Forecast • Key Internal Sponsor • Level of Risk • Line of Business • Quoted • Registered • Registration Status • Registration Type • Sales Channel • Sales Stage • Source • Strategic Value • Win/Loss Reason
Opportunity Revenue	• Count • Sum • Percentage	• Owner	• Actual Close Date • Close Date • Update Date	• Amount • Best Case • Quantity • Revenue in Corporate Currency • Worst Case	• Include in Forecast • Opportunity Status • Revenue Type • Sales Channel
Sales Lead	• Count • Sum • Percentage	• Lead Created By • Lead Last Updated By • Owner ID	• Accepted Date • Converted Date • Estimation Close Date • Expiration Date • Last Automatic Assignment Date • Lead Creation Date • Lead Last Updated Date • Qualification Date	• Budget Amount • Deal Size	• Accepted • Budget Status • Contact Time Zone • Origin • Product Type • Rank • Reassign Reason • Registration Status • Registration Type • Sales Channel

KPI Object	Calculation Type	Credit Recipient	Credit Date	Sum Attribute	Breakup Category
			• Registration Approval Date • Rejected Time Stamp • Retired Time Stamp		• Source • Source Code • Status • Time Frame

Rule Conditions for Supported KPI Objects

You can use both standard and custom attribute (fields) to define rule filter conditions for your KPI.

If you're creating or editing custom KPIs, use the **Attribute** drop-down list from the Conditions section of the Create Custom KPI page and apply rule filter conditions to your custom KPI.

> **Note:** The **Attribute** drop-down list is automatically populated with the correct predefined internal field name. For custom fields, you must enter the internal name of the custom field you previously created in Application Composer.

The following table lists the predefined fields available for adding filter conditions to each of the supported KPI objects.

KPI Object	Add Field
Activity	• Account ID • Account Number • Activity • Activity Number • All Day • Assessment ID • Asset ID • Business Plan ID • Campaign ID • Case ID • Claim ID • Contact Number • Deal ID • Delegator • Direction • Externally Owned • Fund Request ID • Lead ID

KPI Object	Add Field
	• Location • Location ID • Objective ID • Opportunity ID • Outcome • Owner • Owner ID • Partner Party ID • Partner Program ID • Percentage Complete • Primary Contact ID • Priority • Private • Resource Number • Service Request ID • Status • Subject • Subtype • Type
Interaction	• Account ID • Account Number • Channel ID • Channel Type • Contact ID • Contact Number • Direction • Interaction Number • Owner Resource ID • Resource Number • Status • Stripe Code • Substatus Code
Opportunity	• Asset Number • Authority • Budgeted • Currency • Forecast • Line of Business

KPI Object	Add Field
	• Name • Need • Opportunity Last Update Date • Opportunity Number • Owner • Primary Competitor • Primary Contact • Sales Channel • Sales Stage • Source • Status • Win Probability • Win/Loss Reason
Opportunity Revenue	• Amount • Comments • Customer Product Group Name • Include in Forecast • Opportunity Number • Opportunity Status • Primary • Product • Product Group • Product Type • Recurrence Type Code • Revenue Number • Sales Channel • Sales Credit • Sales Credit Type • Split Type Code • Status • Win/Loss Reason
Sales Lead	• Accepted • Account Name • Asset ID • Asset Number • Budget Status • Contact Email • Contact Time Zone

KPI Object	Add Field
	• Customer ID • Deal Size • Job Title • Lead Created By • Lead Last Updated By • Lead Name • Lead Number • Owner • Owner ID • Primary Contact ID • Primary Contact Name • Primary Partner Identifier • Primary Group • Rank • Registration Number • Registration Status • Registration Type • Score • Source • Status

KPI Filter Condition Operators for Custom Fields

You can use operators as part of the rule filter conditions when defining your KPI custom fields.

These are the three field types currently supported:

- Fixed Choice List (FCL)
- Text
- Number

The following table lists the supported operators to use for defining rule filter conditions for the KPI custom fields. The underscore c (_c) attached to the attribute name, for example Score_c, denotes a custom field attribute.

> **Note:** You can combine 2 or more conditions using the AND operator, for example, `Status_c in ('DRAFT', "IN_PROGRESS") AND Score_c > 50`. You can't use the OR operator for custom KPI filter conditions.

Operator	Example
Equals	`Type_c Equals 'NETNEW'` `Score_c Equals 10`
In	`Status_c In ('DRAFT', 'IN_PROGRESS')` `Score_c In (20, 30, 40)`
Is Null	`Comments_c Is Null`
Is Not Null	`Comments_c Is Not Null`
Not Equals	`Score_c Not Equals 50`

How can I activate a Key Performance Indicator (KPI)?

From the Sales Performance KPI page, click the name of the draft KPI that you want to activate. The KPI details are displayed.

Next, click **Edit** and from the Basic Details section, select **Active** from the Status drop down field. Click **Save** to activate the KPI.

Custom KPIs

Create a Custom KPI

Here's an example of how to create a custom KPI where the owner of a sales lead gets credit whenever a lead is qualified.

1. Navigate to **Digital Sales** > **Performance**.
2. From the Sales Performance dashboard, click the Actions menu (3 vertical dots icon) located near the top-right area of the dashboard.
3. Select **Manage KPI**.
4. From the Sales Performance KPI page, click the Actions menu (3 vertical dots icon) located near the top-right area of the dashboard.
5. Select **Create Custom KPI**.

6. In the **Basic Details** section:
    - Enter a name for the KPI.
    - From the Status drop-down field, select from Draft, Active, or Inactive.
    - Enter a meaningful description for the KPI so that users have a good understanding of the purpose and use of the KPI.
7. In the **Calculation Details** section:
    - From the KPI Object drop-down list, select the object that you want to track. For example, you can select from Activity (appointments and tasks), Interaction (calls and emails), Opportunity, Opportunity Revenue, and Sales Lead standard objects. Select **Sales Lead**.
    - From the Calculation Type drop-down list, select how you want to calculate the KPI, for example, Count, Sum, or Percentage. Select **Count** and then enter who will get the points.

      > **Note:** If you select Sum as your calculation type, then enter what attributes you want to sum up. The purpose of the custom KPI of percentage type is to measure your key performance as a percentage.

    - In the Credit Recipient drop-down list, select who will get credit. For example, select from the following options for Lead count:
        - Lead Created By
        - Lead Last Updated By
        - Owner ID

      In this example, select **Owner ID** so each time a lead is qualified, its owner gets credit.
    - In the Credit Date drop-down list, select when the credit will be allocated. For example, select from the following options for Leads:
        - Accepted Date
        - Completed Date
        - Estimation Close Date
        - Expiration Date
        - Less Automatic Assignment Date
        - Lead Creation Date
        - Lead Last Updated Date
        - Qualification Date

      Select **Qualification Date** so that each time a lead is qualified, credit is due to the owner on the date of the lead qualification.
8. In the **Conditions** section, enter what conditions to use to select records.
    - From the Add Field drop-down list, select what attribute you want to measure for the KPI, for example, select **Status** of the Sales Lead.
    - From the Filter Condition area, enter the KPI condition, for example, use Qualified / Converted
9. In the **Statistic Details** section:
    - From the **Breakout Category** drop-down list, select how you want to break down the information displayed in the contest or goal for your custom KPI. For example, selecting **Sales Channel** for leads, displays how many leads were qualified by telesales, direct, or indirect sales channels. This provides valuable insights of KPI achievements to sales teams.
10. Click **Save**.

Create a Custom KPI of Percentage Calculation Type

Here's an example of how to create a custom **Opportunity Win Rate** KPI where the owner of an opportunity gets credit whenever an opportunity is won.

The purpose of the custom KPI of percentage type is to measure the percentage of opportunities being won. Note that the number of opportunities won is calculated as the sum of all opportunities won by close date.

1. From the Sales Performance KPI page, click the Actions menu (3 vertical dots icon) located near the top right area of the dashboard and select **Create Custom KPI**.
2. In the **Basic Details** section, enter a name, status, and meaningful description for the KPI of percentage type.
3. In the **Calculation Details** section:
    - From the KPI Object drop-down list, select the object that you want to track. For example, you can select **Opportunity**.
    - From the Calculation Type drop-down list, select how you want to calculate the KPI, for example, select **Percentage**.

      > **Note:**
      >
      > The Percentage value is calculated by dividing the numerator value by the denominator value and multiplying the result by 100. For example, `(Numerator / Denominator * 100)`. For both numerator and denominator calculation, you must have a sub calculation type. So you can calculate numerator or denominator by either counting or summing records. The resulting number of records calculated is a subset of the denominator value

    - In the Credit Recipient drop-down list, select who will get credit. In this example, select **Owner**.
4. In the **Statistic Details** section:
    - From the **Breakout Category** drop-down list, select how you want to break down the information displayed in the contest or goal for your custom KPI. For example, selecting **Sales Channel** for opportunities, displays how many opportunities were won by telesales, direct, or indirect sales channels. This provides valuable insights of KPI achievements to sales teams.
5. In the **Records to include for Numerator** section specify what records to include as part of the numerator percentage calculation.

   For example, select Count as the **Calculation Type**. Opportunity is already selected as the **Object**.

   > **Note:** The object for both the numerator and denominator will be the same as the object already selected and the calculation type will also be the same for the numerator and denominator.

6. In the Credit Date drop-down list, select when the credit will be allocated. For example, select **Close Date** so that each time an opportunity is won, a percentage of the credit due to the owner on the close date of the opportunity.
7. You now want to narrow down the KPI details by entering some filters you want to use to select the records for the KPI of Percentage type. For example, in the **Filter** section, select **Status** from the **Attributes** drop-down list, select **Equals** from the **Operation** drop-down list, and enter **Won** to complete your filter condition.
8. In the **Records to include for Denominator** section, specify what records to include as part of the denominator percentage calculation. Note the calculation type must match the type used for the numerator so for example, both the **Calculation Type** and **Object** fields are automatically pre-populated with Count and Opportunity respectively.

9. From the **Filter** section enter the conditions to use to select the records for the denominator KPI. For example, to select all opportunities, you select credit date so that all closed opportunities will be counted:
    - Select Opportunity Number from the **Attributes** drop-down list, and select **Is Not Null** from the **Operation** drop-down list
    - You can click the plus sign (+) to add other condition rows, if required.
10. Click **Save**.

Sample Scenarios for Creating Custom KPIs

The following table specifies sample scenarios for creating custom key performance indicators:

Scenario	Create Custom KPI
Opportunity You want to create a KPI to measure opportunities created which are net new opportunities. You have created a custom field named Opportunity Type that has the following values. • Net New • Renewal • Upsell • Cross sell	1. In the **Name** field, enter `Net New Opportunities Created` 2. In the **KPI Object** field, select Opportunity. 3. In the **Calculation Type** field, select Count. 4. In the **Credit Recipient** field, select Opportunity Created By. 5. In the **Credit Date** field, select Opportunity Creation Date. 6. In the **Filter Condition** area, enter `Equals 'Net New'` after the OpportunityType_c internal name. For example, **OpportunityType_c Equals 'Net New'** 7. In the **Breakup Category** field, select Sales Channel.
Activity You want to track how many presentations are scheduled. Create a KPI named Presentations Scheduled which measures appointments scheduled of type 'Presentation' created for the activity object. You have selected the predefined **Appointments Scheduled** KPI and have created a copy of it by using the **Duplicate** action from the **Actions** menu. Your custom KPI is named Presentations Scheduled. You have created a custom field named Appointment Type that has the following value.	1. In the **Name** field, enter `Presentations Scheduled` 2. In the **KPI Object** field, select Activity. 3. In the **Calculation Type** field, select Count. 4. In the **Credit Recipient** field, select Activity Created By. 5. In the **Credit Date** field, select Start Date. 6. In the **Filter Condition** area, enter `Equals 'Presentation',` after the AppointmentType_c internal name. For example, **AppointmentType_c Equals 'Presentation'** 7. In the **Breakup Category** field, select Activity.

Scenario	Create Custom KPI
• Presentation	
Sales Lead You are following up on a sales lead and you want to ensure that the correct participant gets credit for qualifying a lead for an account. You can do this by passing the field filter Lead Status Type for the lead activity. You have created a custom field named Lead Status Type which has the following values. • Qualified • Converted	1. In the **Name** field, enter `Qualified Leads` 2. In the **KPI Object** field, select Sales Lead. 3. In the **Calculation Type** field, select Count. 4. In the **Credit Recipient** field, select Owner ID. 5. In the **Credit Date** field, select Qualification Date. 6. In the **Filter Condition** area, enter `In ('Qualified', 'Converted')` after the LeadStatusType_c internal name. For example, **LeadStatusType_c In ('Qualified', 'Converted')** 7. In the **Breakup Category** field, select Sales Channel.

Can I choose to display or hide the activity history for a custom KPI?

Yes, you can decide to display or hide history for a given custom KPI by selecting or deselecting the **Show activity history** radio button from the Create Custom KPI page.

If selected, then all activity history, in addition to audit history, is displayed. This means that sales users can view any contest or goals created using a custom KPI from the history panel. If you deselect the **Show activity history** radio button, individual or team activity entries for goal and contests related to KPI progress won't appear in the history panel. However, audit entries such as contest created, goal updated, participant added, participant removed and so on will continue to be shown.

How can I hide the progress indicators for active goals?

You can choose to either display or hide goal progress indicators on the goal card for active goals.

The Goal Progress Indicators Enabled (ZCA_ENABLE_GOAL_PROGRESS_INDICATORS) profile option is set to display the goal progress indicators by default so that users can see at a glance how they are performing in reaching their goal performance target.

If users no longer want goal indicators displayed for their active goals, then you can set the profile option value to No.

33 Notifications

Overview of Notifications Setup

Sales users can receive multiple types of notifications that relate to their daily work.

This chapter focuses on notifications about changes to leads, opportunities, accounts, contacts, and other sales objects. For example, you can notify salespeople whenever they're assigned as the owner of a lead or a task.

In the Sales application, administrators can have the notifications delivered in multiple ways:

- Under the Notifications (the bell icon)
- On the browser page
- Sent using email

In CX Sales Mobile, the notifications can be pushed like other mobile notifications or they can appear under the bell notifications icon.

Here's an overview of the setup steps:

Step	Description	Navigation	Where to Get More Details
1	Enable notifications for the web and mobile applications.	**Setup and Maintenance** > **Sales offering** > **Sales Foundation** > **Change Feature Selection**	See the *Enable Notifications* topic in this chapter.
2	Create Groovy trigger scripts so users get notified about object changes.	**Configuration** > **Application Composer** > **Account** > **Server Scripts**	See the *Define Notification Scripts* and *Sample Notification Scripts* topics in this chapter.
3	Specify the recipient types, delivery methods, and notification text for a specific trigger event.	**Tools** > **Notification Preferences**	See the *Configure Delivery Preferences and Text for a Notification* topic in this chapter.
4	To enable notifications for Oracle CX Sales Mobile, you must complete a couple of additional steps that are covered in the CX Sales Mobile chapter.	**Configuration** > **Application Composer** > **Mobile Application Setup** > **Settings** > **Notifications Settings**	*Enable Notifications for Sales Objects in CX Sales Mobile*

Enable Notifications

Here's how to enable notifications for Digital Sales.

1. Navigate to Setup and Maintenance and select the **Sales** offering.
2. In the Functional Area pane, select **Sales Foundation** and click **Actions** (the down arrow), and select **Change Feature Selection** from the drop-down list.

3. In the Edit Features: Sales Foundation page, expand the Notifications row.
4. Select the **Enable** check boxes for the types of notifications you want to enable:
    - **Mobile Notifications** to enable notifications in CX Sales Mobile.
    - **Browser Notifications** to enable notifications using the Notifications (Bell) icon at the top of the page.
    - **Use Email as a Notification Delivery Channel** to enable email notifications.
5. Click **Done**.

Other configurations:

- You can further configure these options by specifying recipients. See the "*Configure Delivery Preferences and Text for a Notification*" topic in this chapter for details.
- You can also set appointment and task reminders at the company and user levels, enable drill-down to activity notifications, and enable activity delegation. For more information, see the start with *Overview of Activities* in the *Implementation Reference* guide.

Define Notification Scripts

Define the Groovy scripts for the notifications.

> **Note:** For your reference, you can use the sample scripts and related details that we provide in the *Sample Notification Scripts* topic as you work through this procedure. These scripts are provided as examples only; your own business requirements may be different from what these samples provide.

1. Ensure you're working in an active sandbox.
2. From the Tools menu, select **Application Composer**.
3. In the navigation tree, expand **Standard Objects**, expand the object you want, and then click **Server Scripts**.

   Example: **Standard Objects** > **Account** > **Server Scripts**.
4. Click the **Triggers** tab on the Server Scripts page.
5. Click the add icon.
6. In the Create Trigger Object page, create the Groovy trigger:
    a. In the **Trigger** field, select the trigger type.

       Example: **Before Insert in Database**
    b. Enter a name for the trigger.

       Example: **Account Owner Changed**
    c. Add a description.

       Example: **Sends a notification when the owner of an account is changed.**
    d. Enter the trigger Definition details. When you create a Groovy script, you need the API names of the fields you're trying to access. Create your triggers based on parent/child fields, with these steps:
        i. In the Trigger Definition section's toolbar, click the **Show/Hide Expression Palette** icon.
        ii. Click the **Fields** tab.
        iii. Select an **Object**.

iv. Click the arrow to collapse the Object area and expand the fields area for the object you selected. The fields for the selected object are displayed.
v. Select the API you want, and click **Insert**.
vi. To close the expression palette, click the **Show/Hide Expression Palette** icon.

The `isAttributeChanged()` function works only for the Before trigger types. The workaround for the After trigger types involves retrieving the old value before the database is updated, then retrieving the new value after the update, and then comparing the two values to see whether the attribute is changed. However, this workaround works only for high-level attributes such as CriticalFlag and Status and not for the ViewRow attribute.

7. In the Edit Script area, add a Groovy script.
8. Click **Save and Close**.
9. Test your changes and publish the sandbox.

Sample Notification Scripts

This topic contains sample notification scripts you can use for different objects. These are for reference only. Your own business requirements may mean you use different scripts.

Account Sample Scripts

Here are some sample scripts for the Account object:

Use Case 1: Notifies the owner of an account that a new account has been assigned to her

Notification and Navigation Details

- Notification information: New account: <account name>
- Sent to: Owner of the account
- Navigates user to: Account details page

Type

Before Insert in Database

Script

```
/def upID = adf.util.getUserPartyId(); if (isAttributeChanged('OwnerPartyId') && OwnerPartyId!=upID) { try
{ def map = new HashMap(); // Specifying the recipient def recipientPartyId = OwnerPartyId // Specify default
MessageText def messageText = "New Account : '" + OrganizationName + "'." // Specify one or more channels
map.put("Channels",["ORA_SVC_BELL"]); map.put("MessageText", messageText); // The following can be used to
pass a Long PartyId map.put("RecipientPartyId", recipientPartyId); if (recipientPartyId) { // Call to send
notification adf.util.sendNotification(adf, map)
```

Use Case 2: Notifies the owner of an account that another user has been assigned as the account owner

Notification and Navigation Details

- Notification information: Account assigned: <account name>
- Sent to: Owner of the account

- Navigates user to: Account details page

Type

Before Update in Database

Script

```
/if (isAttributeChanged('OwnerPartyId')) { try { def map = new HashMap(); // Specifying the
recipient def recipientPartyId = OwnerPartyId // Specify default MessageText def messageText =
"Account Assigned: '" + OrganizationName + "'." // Specify one or more channels map.put("Channels",
["ORA_SVC_BELL"]); map.put("MessageText", messageText); // The following can be used to pass a Long
PartyId map.put("RecipientPartyId", recipientPartyId); if (recipientPartyId) { // Call to send notification
adf.util.sendNotification(adf, map)
```

Activity Sample Script

Here is a sample script for the Activity object:

Use Case: Notifies the assignee of a task when a task is assigned to him

Notification and Navigation Details

- Notification information: Task assigned: <task name>
- Sent to: Assignee
- Navigates user to: Task details page

Type

Before Update in Database

Script

```
/if (isAttributeChanged('OwnerId') && ActivityFunctionCode == 'TASK') { try { def map = new HashMap();
def messageText = "Task assigned: " def recipientPartyId = OwnerId // Specify one or more channels
map.put("Channels",["ORA_SVC_BELL"]); // Specify default MessageText map.put("MessageText", messageText); //
The following can be used to pass a Long PartyId map.put("RecipientPartyId", recipientPartyId); if
(recipientPartyId) { adf.util.sendNotification(adf, map) } else { println("No Owner associated with this
Task") } } catch (e) { throw new oracle.jbo.ValidationException('Failure to trigger Notification from Groovy
Script: ' + e.getMessage()) } }
```

Contact Sample Scripts

Here are some sample scripts for the Contact object:

Use Case 1: Notifies the owner of a contact that a new contact has been assigned to her

Notification and Navigation Details

- Notification information: New contact: <contact name>
- Sent to: Owner of the contact
- Navigates user to: Contact details page

Type

Before Insert in Database

Script

```
/def upID = adf.util.getUserPartyId(); if (isAttributeChanged('OwnerPartyId') && OwnerPartyId!=upID) { try
{ def map = new HashMap(); // Specifying the recipient def recipientPartyId = OwnerPartyId // Specify
default MessageText def messageText = "New Contact: '" + PersonName + "'." // Specify one or more channels
map.put("Channels",["ORA_SVC_BELL"]); map.put("MessageText", messageText); // The following can be used to
pass a Long PartyId map.put("RecipientPartyId", recipientPartyId); if (recipientPartyId) { // Call to send
notification adf.util.sendNotification(adf, map)
```

Use Case 2: Notifies the owner of a contact that another user has been assigned as the contact owner

Notification and Navigation Details

- Notification information: Contact assigned: <contact name>
- Sent to: Owner of the contact
- Navigates user to: Contact details page

Type

Before Update in Database

Script

```
/ if (isAttributeChanged('OwnerPartyId')) { try { def map = new HashMap(); // Specifying the recipient def
recipientPartyId = OwnerPartyId // Specify default MessageText def messageText = "Contact Assigned: '" +
PersonName + "'." // Specify one or more channels map.put("Channels",["ORA_SVC_BELL"]); map.put("MessageText",
messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId", recipientPartyId);
if (recipientPartyId) { // Call to send notification adf.util.sendNotification(adf, map)
```

Contest and Goal Sample Scripts

Here are some sample scripts for the Contest and Goal objects:

Use Case 1: Notifies participants of a contest that a contest has been created

Notification and Navigation Details

- Notification information: Contest created: <contest name>
- Sent to: Contest participants
- Navigates user to: Contest details page

Type

Before Insert in Database

Script

```
/def map = new HashMap(); // Specify one or more channels map.put("Channels",[ "ORA_SVC_BELL"]); //
Specify default MessageText def messageText = "Contest created: " + ContestName; map.put("MessageText",
messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId", OwnerId);
adf.util.sendNotification(adf, map)
```

Use Case 2: Notifies goal participants that a new goal has been created

Notification and Navigation Details

- Notification information: Goal created: <goal name>
- Sent to: Participants
- Navigates user to: Goal details page

Type

Before Update in Database

Script

```
// Specify one or more channels map.put("Channels",["ORA_SVC_BELL"]); // Specify default
MessageText map.put("MessageText", messageText); // The following can be used to pass a Long PartyId
map.put("RecipientPartyId", recipientPartyId); if (recipientPartyId) { adf.util.sendNotification(adf,
map) } else { println("No Owner associated with this Goal") } } catch (e) { throw new
oracle.jbo.ValidationException('Failure: ' + e.getMessage()) } }
```

Lead Sample Scripts

Here are some sample scripts for the Lead object:

Use Case 1: Notifies lead owner that a new lead has been assigned to him

Notification and Navigation Details

- Notification information: Lead assigned: <lead name>
- Sent to: Owner
- Navigates user to: Lead details page

Type

Before Update in Database

Script

```
/if (isAttributeChanged('OwnerId')) { try { def map = new HashMap(); def messageText = "Lead
Assigned: " + Name def recipientPartyId = OwnerId // Specify one or more channels map.put("Channels",
["ORA_SVC_BELL"]); // Specify default MessageText map.put("MessageText", messageText); // The following
can be used to pass a Long PartyId map.put("RecipientPartyId", recipientPartyId); if (recipientPartyId)
{ adf.util.sendNotification(adf, map) } else { println("No Owner associated with this Lead") } } catch (e)
{ throw new oracle.jbo.ValidationException('Failure: ' + e.getMessage()) } }
```

Use Case 2: Notifies the lead owner when a lead is assigned to her but the signed-in user has a userPartyId that's different from the lead owner of the lead

Notification and Navigation Details

- Notification information: New lead: <lead name>
- Sent to: Owner
- Navigates user to: Lead details page

Type

Before Insert in Database

Script

```
/def upID = adf.util.getUserPartyId(); if (isAttributeChanged('OwnerId') && OwnerId!=upID) { try { def map = new HashMap(); def messageText = "New Lead: " + Name def recipientPartyId = OwnerId// Specify one or more channels map.put("Channels",["ORA_SVC_BELL"]); // Specify default MessageText map.put("MessageText", messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId", recipientPartyId);if (recipientPartyId) { adf.util.sendNotification(adf, map) } else { println("Notification is not sent as Owner of this Lead: "+ Name + " is same as logged in user"); } } catch (e) { throw new oracle.jbo.ValidationException('Failure: ' + e.getMessage()) } }
```

Opportunity Sample Scripts

Here are some sample scripts for the Opportunity object:

Use Case 1: Notifies the opportunity owner when an opportunity has been assigned to her

Notification and Navigation Details

- Notification information: Opportunity assigned: <opportunity name>
- Sent to: Owner
- Navigates user to: Opportunity details page

Type

Before Update in Database

Script

```
/if (isAttributeChanged('OwnerResourcePartyId')) { try { def map = new HashMap(); def messageText = "Opportunity Assigned: " + Name def recipientPartyId = OwnerResourcePartyId // Specify one or more channels map.put("Channels",["ORA_SVC_BELL"]); // Specify default MessageText map.put("MessageText", messageText); // The following can be used to pass a Long PartyId map.put("RecipientPartyId", recipientPartyId); if (recipientPartyId) { adf.util.sendNotification(adf, map) } else { println("No Owner associated with this Opportunity") } } catch (e) { throw new oracle.jbo.ValidationException('Failure: ' + e.getMessage()) } }
```

Use Case 2: Notifies the opportunity owner when an opportunity is assigned to them, but the signed-in user has a userPartyId that's different from him

Notification and Navigation Details

- Notification information: New opportunity: <opportunity name>
- Sent to: Owner
- Navigates user to: Opportunity details page

Type

Before Insert in Database

Script

```
/def upID = adf.util.getUserPartyId(); if (isAttributeChanged('OwnerResourcePartyId') && OwnerResourcePartyId! =upID) { try { def map = new HashMap(); def messageText = "New Opportunity: " + Name def recipientPartyId
```

```
= OwnerResourcePartyId // Specify one or more channels map.put("Channels",["ORA_SVC_BELL"]); // Specify
default MessageText map.put("MessageText", messageText); // The following can be used to pass a Long PartyId
map.put("RecipientPartyId", recipientPartyId); if (recipientPartyId) { adf.util.sendNotification(adf, map) }
else { println("Notification is not sent as Owner of this Opportunity: "+ Name + " is same as logged in
user"); } } catch (e) { throw new oracle.jbo.ValidationException('Failure: ' + e.getMessage()) } }
```

Configure Delivery Preferences and Text for a Notification

Here's how you specify the recipient types, delivery methods, and notification text for a specific trigger event:

1. Sign in as a user with the Sales Administrator job role.
2. In the Navigator, click **Tools** > **Notification Preferences**.
3. In the Notification Preferences page, select an object from the **Object** list.
4. Click **Add** to add a blank row to the table.
5. Select **Yes** from the Enabled drop-down list
6. In the **Override** field, select Yes or No:

   Override lets you specify whether a user has the ability to opt-out of the notification. If you set it to no, users can't opt out of the notification.
7. Select a Groovy notification prompt from the **Triggering Event** list.
8. Enter the notification name and description. The text you enter into the Notification Name field becomes the first part of the notification subject.
9. In the Recipients column, click the edit icon.
10. In the Configuration for Trigger Name window, select the notification delivery options for recipients and then click **Done**.

    The application sends notifications to the specified recipients only if you select at least one delivery method, so be sure to select at least one method. In addition to getting communication through the selected delivery method, the recipient also receives a bell notification. Select the **Bell Notifications** option to enable the notifications that appear in the global header.

    See the tables later in this topic for more information about the supplied recipients and delivery methods.
11. Click the **New SmartText** link, enter the notification text for the selected object, and then click **Publish**. SmartText also lets you add variables to the notification message.
12. To delete a notification preference, select the row and click **Delete**. This action deletes any associated notification text, too.

    > **Note:** If you delete a notification that's generated using a Groovy script, you can create a new notification using the same Groovy script, if it isn't used by another notification.
13. To modify an existing notification text, click the **Update SmartText** icon for the selected row.
14. Click **Save**.

Here are the predefined notification recipients:

Recipient	Description
Manager of Owner ID	Manager of the notification owner

Recipient	Description
Owner ID	The one who sends or assigns the notification
Resource team	Additional resources added to an object in the Team subtab (Fusion Service only) **Note:** Resource teams aren't applicable for Digital Sales.

Here are the predefined delivery methods:

Delivery Method	Description
Bell Notifications	Enables the bell notification for the web application
Mobile Notifications	Enables notifications on the mobile application
Browser Notifications	Enables notifications to users in the Omnichannel toolbar (Fusion Service only)
Email Notifications	Enables email notifications

For more information about using SmartText, see topics on using smart texts in the Using Fusion Service guide.

Note: In the sales applications, activities (tasks and appointments) use a different model to set up notifications. For more information on how to set up notifications for activities, see the "Set Up Activity Notifications" topic in the Activities chapter in the Implementing Sales guide.

Related Topics

- Set Up Activity Notifications
- How You Use SmartText in Service Requests
- What are the SmartText naming conventions?

34 Oracle Digital Assistant

Language Processing Using Oracle Digital Assistant

Sales features that require natural language processing, including sales recommendations, Action Bar filtering, and the Sales Assistant chatbot, rely on the Oracle Digital Assistant (ODA) platform. Here's a brief overview of concepts that will help you complete the required basic ODA setup and integrate the different sales features. Refer to the ODA documentation to understand the full capabilities of the platform. At present, natural language processing is available for English only.

Here's an architecture overview:

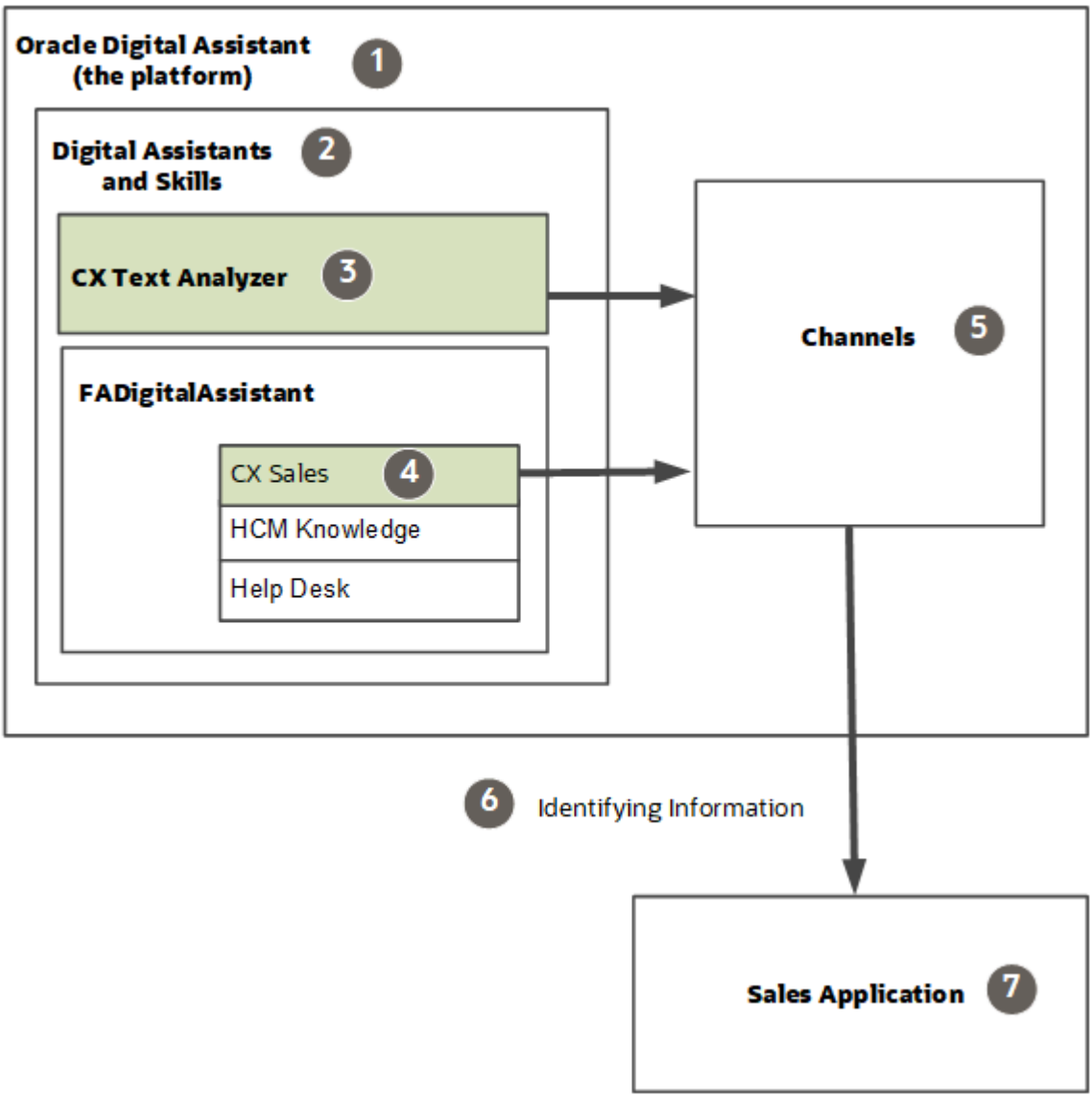
1. Oracle Digital Assistant (ODA) is a platform that's used to create chatbots and to provide natural language processing for other applications and features.
2. Different domains, such as sales, service, and financials, require different sets of language skills. Oracle provides some skills as stand-alone components. It builds others into digital assistants. You can install both in your ODA application instance from the ODA "store".
3. For all Oracle cloud application chatbots, including the Sales Assistant, and for filtering activities, you install (the term used is "pull") the FADigitalAssistant digital assistant.
4. FADigitalAssistant includes multiple chatbot skills, including CX Sales, Help Desk and HCM Knowledge. For sales, you're using only the CX Sales skill.
5. For the Recommendations feature in both the Digital Sales UI and in CX Sales Mobile,, you install ("pull") the CX Text Analyzer skill.
6. For each sales feature that uses natural language processing, you create a separate channel. There are different types of channels for different uses.
    - For sales recommendations (handled by the CX Text Analyzer skill) in both the Digital Sales UI and in CX Sales Mobile, you create the Webhook channel. The Sales Recommendations feature analyzes the text of call logs and notes salespeople enter to recommend what action to take.
    - For the CX Sales skill in FADigital Assistant, different channels handle different applications:
        - To enable natural language filtering of activities, you create an Oracle Web channel.
        - To enable the Sales Assistant chatbot in CX Sales Mobile, you create Oracle Web channel. You can use the same Oracle Web channel for both activities filtering and Sales Assistant.
        - To enable the Sales Assistant chatbot for Microsoft Teams in CX Sales Mobile, you create a Microsoft Teams channel.
7. After you create and activate a channel, you copy over identifying information from the channel to the sales application to complete the link. You can learn how to create the channel for each feature and how to create the link by reviewing the documentation for the feature.

Here's a visual overview of the integration between Sales and the Oracle Digital Assistant platform:

Oracle Digital Assistant Integration Elements

Callout	Description
1	Oracle Digital Assistant (ODA) is a platform that's used to create chatbots and to provide natural language processing for other applications and features. It bundles others into digital assistants You can install both in your ODA application instance from the ODA "store".

Callout	Description
2	Different domains, such as sales, service, and financials, require different sets of language skills. Oracle provides some skills as stand-alone components. Others are bundled into digital assistants.
3	For Sales, you use the CX Text Analyzer skill set for the Sales Recommendation feature.
4	For activities filtering and for the Sales Assistant chatbot in CX Sales Mobile and Microsoft Teams, you use the FADigitalAssistant.
5	You connect the skills in ODA to the sales application, by creating different types of channels.
6	You copy the identifying information in a channel.
7	And enter it in the Sales Application. How you enter the information varies depending on the channel.



Related Topics

- Getting Started with Oracle Digital Assistant for Cloud Applications.

Overview of Common ODA Setup for Sales

Here's an overview of the basic Oracle Digital Assistant setup that you must complete for sales features that use natural language processing, including sales recommendations and the Sales Assistant chatbot used with Oracle CX Sales Mobile and Microsoft Teams.

Step	Setup Task	Application	Description	Where to Get More Details
1	Enable a user to administer the Oracle Digital Assistant application.	Oracle Identity Cloud Service (IDCS)	In IDCS, you must provide the user setting up the sales feature with the ability to administer the Oracle Digital Assistant (ODA) platform. This one-time setup involves importing sales users into IDCS, and assigning the Service Administrator role to the user doing the setup in ODA. You must have the Identity Domain Administrator role to complete this step.	See the topic: *Enable Users to Administer Oracle Digital Assistant*. For additional information, see the Oracle Digital Assistant documentation: *Getting Started with Oracle Digital Assistant for Cloud Applications.*
2	Copy the URL for the Oracle Digital Assistant (ODA) for your use in setup.	Oracle Identity Cloud Service (IDCS)	You can obtain the URL to access the ODA platform UI during your IDCS setup. Just copy the URL from the idcs-oda application Configuration tab, Resources section, Primary Audience field. This step is optional. After you opt in to the Digital Assistant feature in your sales application (step 3), you can also access the ODA platform UI directly from the sales application through the Manage Digital Assistant setup task.	See the topic: *Obtain the Oracle Digital Assistant URL*
3	Opt in to the Digital Assistant feature.	Sales application	Opt in to the Digital Assistant feature. This is a one-time setup.	See the topic: *Opt in to Oracle Digital Assistant*

Step	Setup Task	Application	Description	Where to Get More Details
			After you do so, you can access the ODA platform UI directly from Setup and Maintenance in the Sales application using the Manage Digital Assistant setup task.	
4	Install the Digital Assistant for Fusion Applications (FADigitalAssistant) provided by Oracle.	Oracle Digital Assistant	In the ODA platform, you must pull (install) the FADigitalAssistant and the CX Text Analyzer from the application's skill store. The FADigitalAssistant includes the CX Sales skill that's required for activities filtering and the Sales Assistant chatbot in the CX Sales Mobile and Microsoft Teams applications. The CX Text Analyzer digital assistant is required for the Sales Recommendations feature.	See the topic: *Install the Digital Assistants*
5	Create channels for the features that use natural language processing and hook them up to Sales.	Use Oracle Digital Assistant for the channel creation.	How you create the channels and how you hook them up depends on the feature. Follow the setup instructions in the chapters covering different features.	See the topics: • *Overview of Sales Recommendations Setup* • *Overview of Natural-Language Filtering Setup for Activities* • *Set Up Oracle Sales Assistant for CX Sales Mobile* • *Set Up Oracle Sales Assistant for Microsoft Teams*
6	Periodically update the FADigitalAssistant and CX Text Analyzer digital assistants.	Oracle Digital Assistant	FADigitalAssistant and the CX Text Analyzer digital assistants are updated every release and three times within each release. You should periodically update both to the latest version.	See the topic: *Refresh the Digital Assistants*

Enable Users to Administer Oracle Digital Assistant

Before you can set up the integration with the Oracle Digital Assistant (ODA) platform, you must grant one or more users the appropriate permission in the Oracle Identity Cloud Service.

Here's how:

- Import the users from your sales application into the Oracle Identity Cloud Service (IDCS).

  Although you only need one user to perform the integration and administer the service, you must import all of them.
- Assign the Service Administrator Role to the user who will be doing the ODA integration.

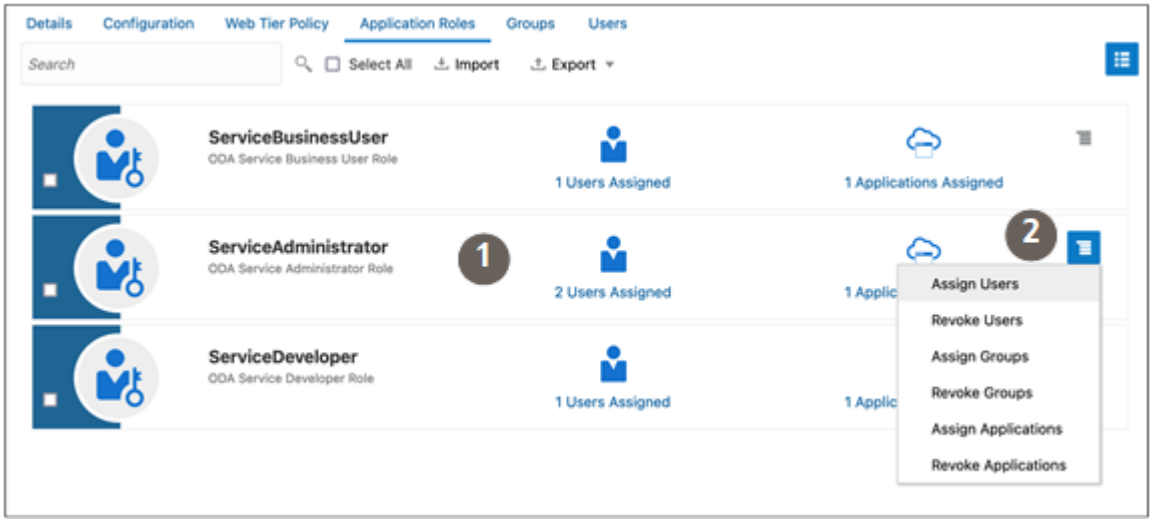
Import Sales Users into IDCS

1. Sign in to Oracle Identity Cloud Service.
2. To import the users, enable user synchronization:
   a. Click **Navigator** > **Oracle Cloud Services**
   b. Search for and select the Oracle Applications Cloud instance.
   c. Click the **Provisioning** tab.
   d. Turn on **Enable Provisioning.**
   e. In the **Select Provisioning Operations** section of the page, select the **Authoritative Sync** check box.
   f. Turn on **Enable Synchronization**.
   g. Click **Save**.
3. Verify that the users are available and synchronized in the application:
   a. Click the **Users** tab.
   b. Check whether the users are available in the application. If they're not, import the users:
      i. Click the **Import** tab.
      ii. Click **Import**.

Assign the Service Administrator Role to the User Performing the Integration

1. While signed in to the Oracle Identity Cloud Service, click **Navigator** > **Oracle Cloud Services**.
2. Search for the application name that starts with **idcs-oda**.
3. Open the application.
4. Click the **Applications Roles** tab.

5. Select the **Service Administrator** role (callout 1 in the screenshot) and click the corresponding menu item (callout 2).

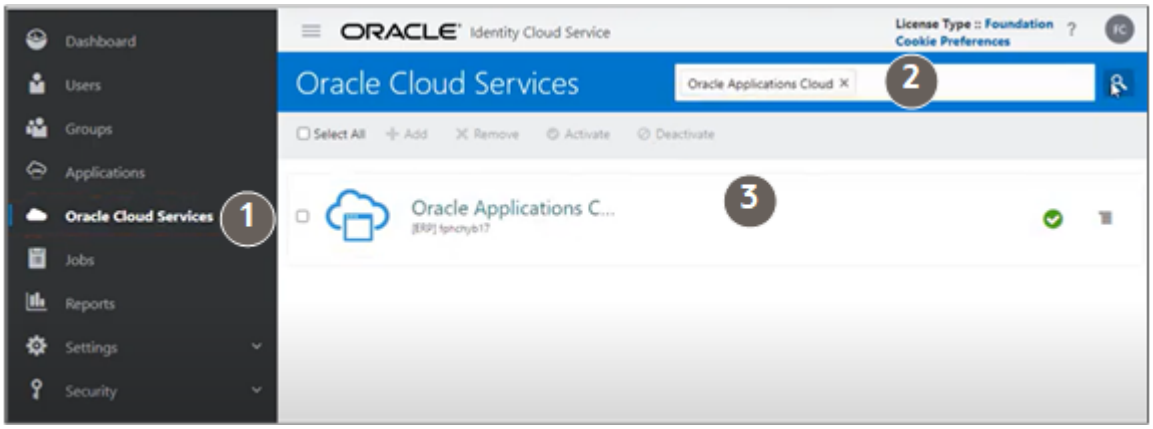


6. From the menu, select **Assign Users**.
7. Search for the user you want to assign.
8. Select the user and click **OK**.

Obtain the Oracle Digital Assistant URL

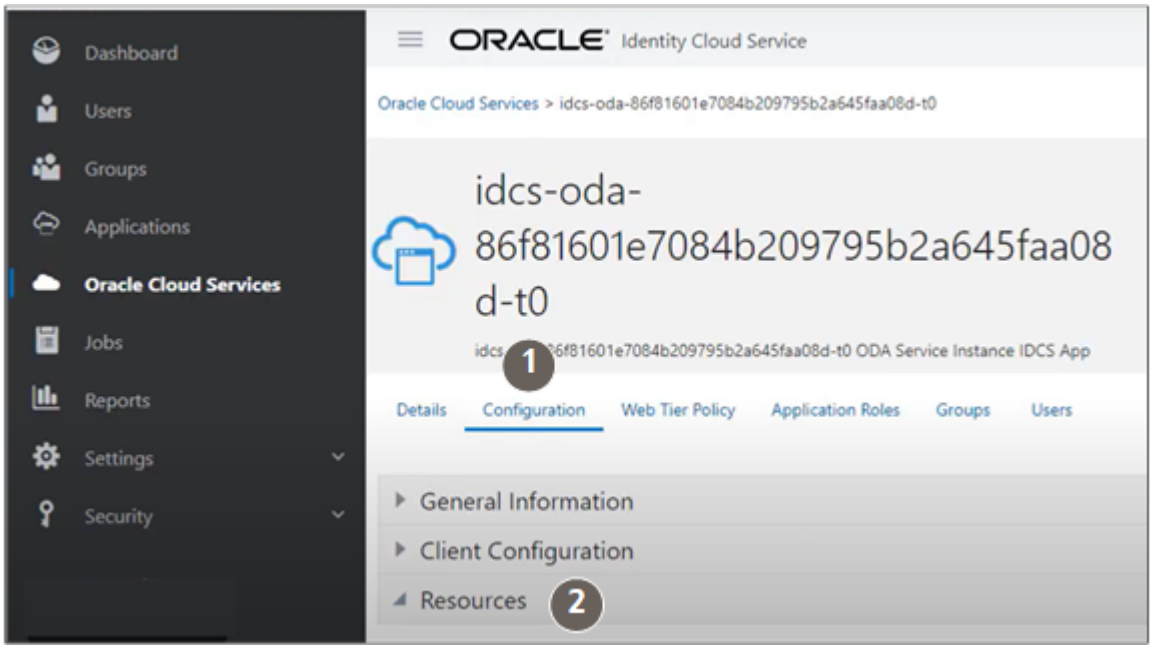
Here's how to obtain the URL that you can use to access to the Oracle Digital Assistant platform for setup.

1. While signed in to the Oracle Identity Cloud Service (IDCS), click **Navigator** > **Oracle Cloud Services** (callout 1 in the screenshot).
2. Search for the application name that starts with **idcs-oda** (callout 2).
3. Click to open the application (callout 3).

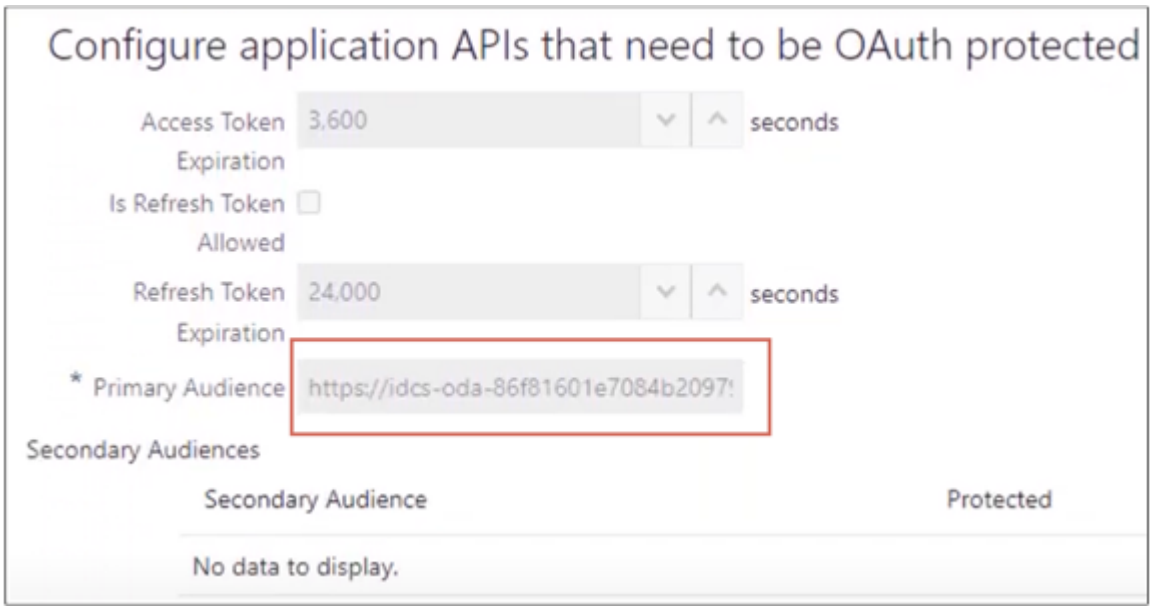


4. Click the **Configuration** tab (callout 1 in the following screenshot).

5. Expand the **Resources** section (callout 2).



6. Copy the URL from the **Primary Audience** field (highlighted in the following screenshot)

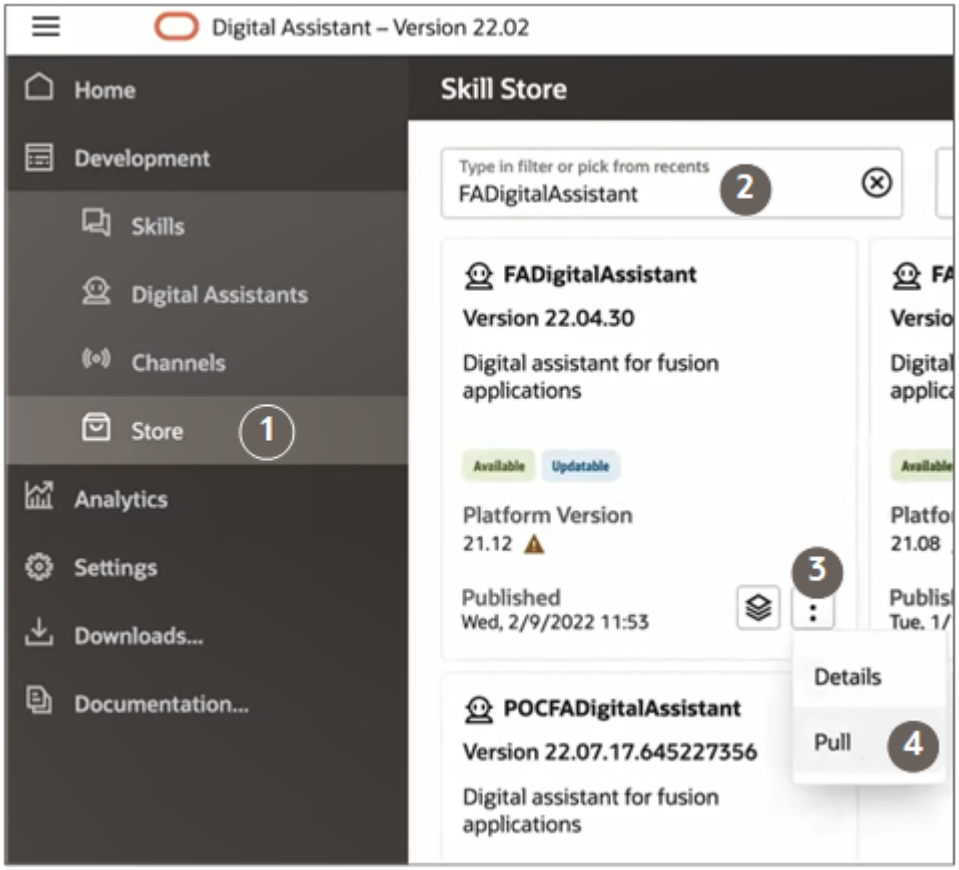


Install the Digital Assistants

To enable the integration, you must pull the FADigital Assistant and the CX Text Analyzer digital assistants from the Oracle Digital Assistant platform store. The FADigitalAssistant includes the CX Sales skill that's required for activities filtering and the Sales Assistant chatbot in the CX Sales Mobile and Microsoft Teams applications. The CX Text Analyzer digital assistant is required for the Sales Recommendations feature.

.

1. Sign in to Oracle Digital Assistant as the user granted the administrative privilege.
2. Click the **Navigator**.
3. Expand the **Development** menu item.
4. Click **Store** (callout 1 in the screenshot).
5. In the Skill Store, search for either **FADigitalAssistant** or **CX Text Analyzer**.
6. Locate the version that corresponds to your application release, the first four digits of the version number. For example, Version 22.04.30 corresponds to applications version 22A. The last two digits show the FADigitalAssistant version. To see all available versions, click **Display all versions of this skill** (the square icons) next to the Actions menu.
7. Click **Actions** (three vertical dots highlighted by callout 3) and select **Pull** (callout 4).



Opt in to Oracle Digital Assistant

You must opt in to the Digital Assistant feature. Opting in enables the Digital Assistant functional area in the Sales offering. You can then open Oracle Digital Assistant directly from the sales application using the Manage Digital Assistant setup task.

1. Navigate to the Setup and Maintenance work area and select the **Sales** offering.
2. In the **Functional Areas** pane, click **Change Feature Opt In**.
3. Enable the **Digital Assistant** functional area by selecting the check box.
4. Click **Done**.
5. From now on, you can open the Oracle Digital Assistant from the Sales offering:
    a. In the **Functional Areas** pane, click **Digital Assistant**.

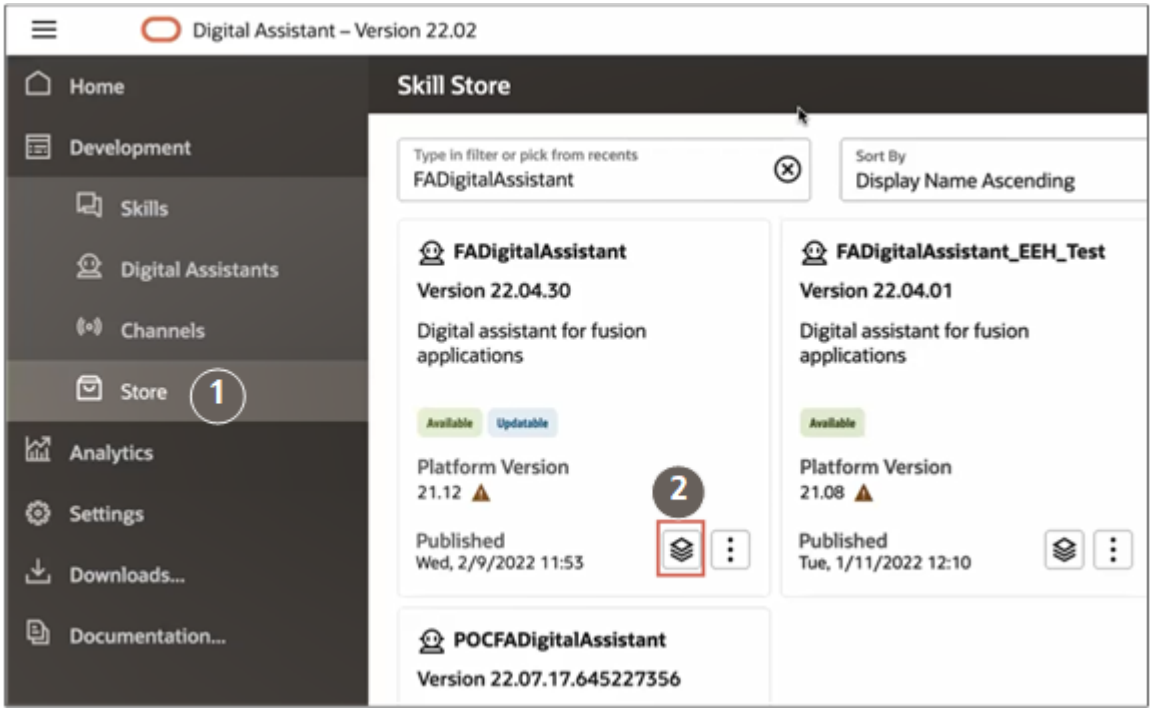
b. In the **Task** pane, click the **Manage Digital Assistant** task.

Refresh the Digital Assistants

Oracle updates both digital assistants used in Sales (FADigitalAssistant and the CX Text Analyzer) once very release and multiple times between releases. To get the full benefit of the feature, you must ensure that you have the latest version that corresponds to your sales application version.

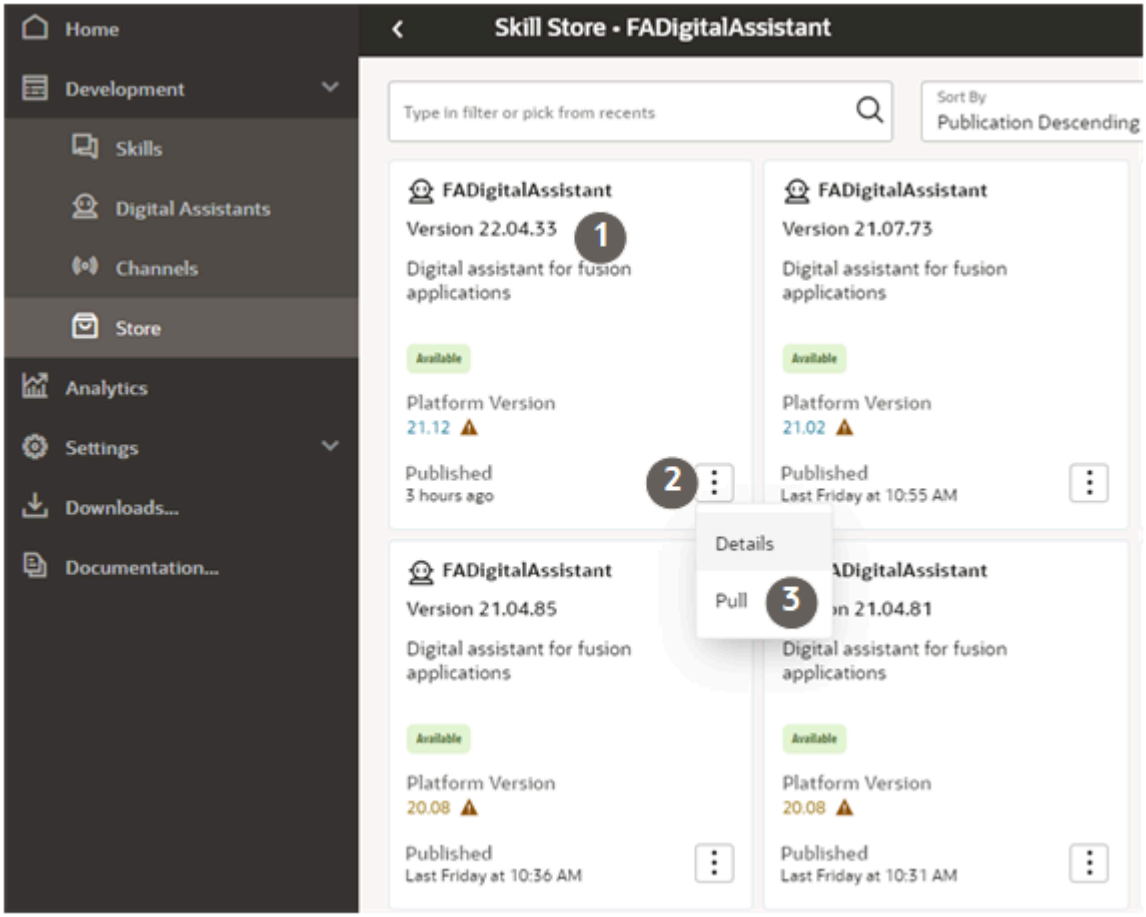
Here's how to get the latest updates:

1. Sign in to Oracle Digital Assistant as the user granted the administrative privilege.
2. Click the **Navigator**.
3. Expand the **Development** menu item.
4. Click **Store** (callout 1 in the screenshot).
5. In the Skill Store, search for **FADigitalAssistant** or **CX Text Analyzer**.
6. Locate the version that corresponds to your application version. The first four digits of the version number correspond to the release. For example, Version 22.04.33 (callout 1 in the following screenshot) corresponds to applications version 22A. The last two digits show the FADigitalAssistant version.
7. Click **Display all versions of this skill** (callout 2 in the screenshot).



8. Find the latest version for your release (the highest number) (callout 1 in the following screenshot).

9. Click **Actions** (three vertical dots highlighted by callout 2) and select **Pull** (callout 3).



10. Now select the refreshed skill in the channel:
    a. Click **Channels**.
    b. Select the channel to refresh the skill in the list of channels.

> **Note:**
>
> - For Oracle Sales Assistant for Microsoft Teams, configure the Microsoft Teams channel. See *Set Up Oracle Sales Assistant for Microsoft Teams* in the Implementation Reference guide for more information.
> - For CX Sales Mobile, configure the Oracle Web Channel. See the topic *Enable Sales Assistant for CX Sales Mobile*.

    c. In the **Route to** field, select the new skill version.
    d. In the Change Channel Routing dialog, click **Change**.

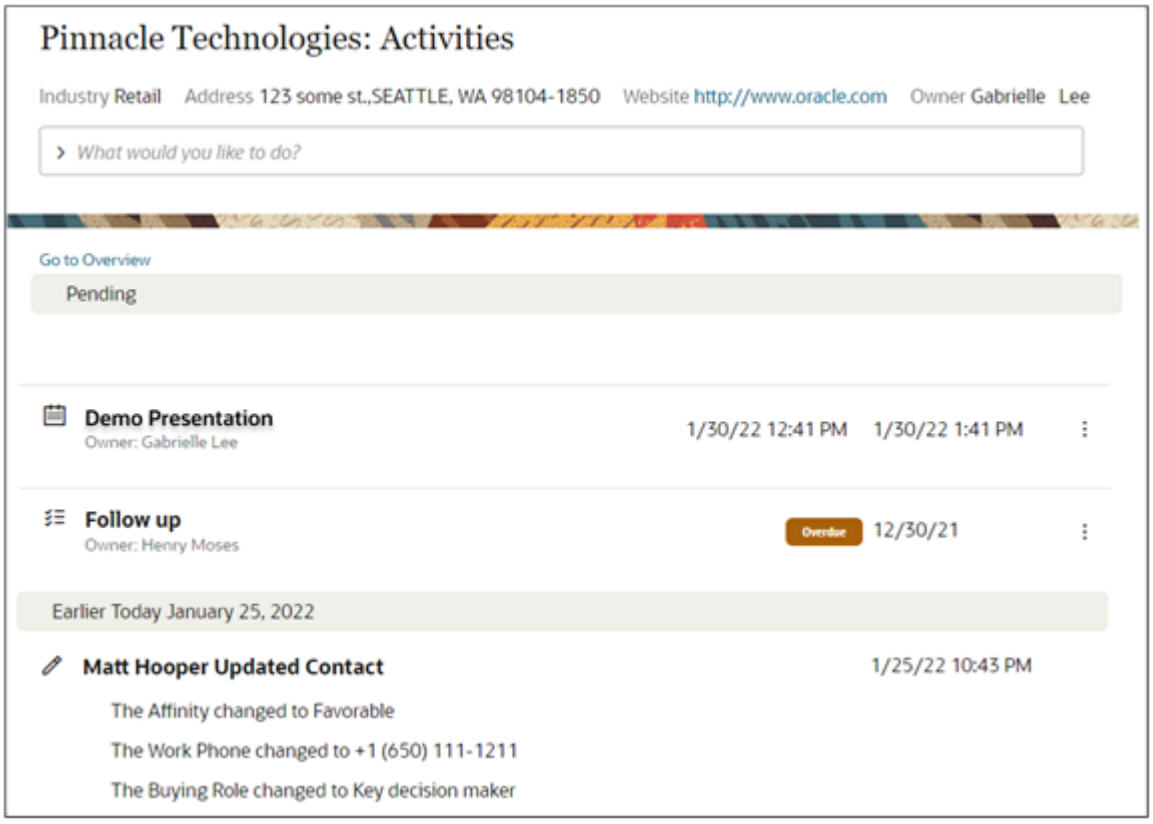
35 Activities on Individual Records

What Activities Track on Individual Records

In Digital Sales, the Activities panel and page on each record track and display a broad range of activities, not just the tasks and appointments you see in the Activities work area. Activities tracked include email exchanges, notes, call logs, past and future tasks and appointments, as well as recent updates to the record itself. The application tracks these activities on accounts, opportunities, contacts, and leads.

The Activities page on individual records tracks important updates in chronological order, sometimes called the activity stream. For example, the list of activities for an opportunity may show that the opportunity was reassigned to a different owner, that an appointment is scheduled for the next day, or that a task has been created. Administrators can determine what information gets displayed, but don't think of activities as an audit trail. Not all updates are tracked.

Here's a screenshot showing both pending activities and the record of recent updates for a contact. The items under the **Matt Hooper Updated Contact** heading lists the important changes Matt Hooper made to the account during one edit. Each time you save, the application creates another heading with a time stamp.



Overview of Activities Setup

Here's a summary of the steps to specify which activities get tracked for different objects in Digital Sales.

Note: This chapter covers only activity setup for Digital Sales. For information on how the CX Sales UI defines and handles activities, see the Activities chapter of the Implementation Reference guide: *Overview of Activities*.

Step	Description	Navigation	Where to Get More Details
1	You must create and activate an activities configuration for each object you use in Digital Sales. You create an activities configuration by duplicating an existing one. Oracle provides a predefined configuration for each object. If you want to use the predefined configuration, just copy it and activate it. If you want to change what gets displayed in Activities for an object, you can edit your copy before activating it.	**Navigator** > **Configuration** > **Configure Activities Display**	See the topic: *Create and Activate an Activities Configuration*
2	Set the profile option Set the Common CRM Signals Active (ORA_ZCA_ENABLE_SIGNALS) to **No**.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Administrator Profile Values**	See the topic: *Set Profile Option Values*
3	Run the **Publish Feed Elements** process to create the index required by Adaptive Search. Don't select the Production to Test Enabled check box. This check box is used for migrating indexes from production to test instances. You run this process only once.	**Navigator** > **Tools** > **Scheduled Processes**	See the topic: *How do I enable the list of activities in each record in Oracle Sales in the Redwood User Experience?*
4	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 are 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**	See the topics and explanation in this section: *Natural-Language Filtering for Activities*
5	Set the profile option Set the Common CRM Signals Active	**Setup and Maintenance** > **Sales** > **Sales Foundation** >	See the topic: *Set Profile Option Values*

Step	Description	Navigation	Where to Get More Details
	(ORA_ZCA_ENABLE_SIGNALS) to **Y**.	**Manage Administrator Profile Values**	

How You Determine What Shows Up in Activities

You can specify what information displays in Activities for each record by creating an activities configuration in the Configure Activities Display page and activating it. You must create and activate a separate activities configuration for every object.

In the configuration, you can make information visible by checking two check boxes:

- **Make Available for Display**

  Displays the attribute in activities.
- **Monitor for Changes**

  Tracks changes in the attribute.

You must check both check boxes for the information to be visible. For many attributes, you check both check boxes for the same attribute. For example, note text is stored in the NoteTxt attribute. So, to display notes salespeople create any subsequent updates to the note text, you select both check boxes for the NoteTxt attribute:

Attribute	Unique Name	Make Available for Display	Monitor for Changes
Note	NoteTxt	Yes	Yes

To display information from certain fields, including dynamic choice list fields and fixed choice list fields, you must check the check boxes for different attributes. That's because the information that displays in the UI comes from the name column while the tracking of changes comes from the ID column. For example, if you're displaying the owner of a task, a dynamic-choice list field, there are two attributes at play:

• Owner

• Owner Party ID

The Owner field stores the name of the person identified by the Owner Party ID. You want to display the owner name in the UI, but you have to monitor the Owner Party ID to see if a new owner has been assigned. Here are the settings you make for displaying the owner:

Attribute	Unique Name	Make Available for Display	Monitor for Changes
Owner	OwnerName	Yes	No
Owner Party ID	OwnerPartyID	No	Yes

Some information displayed in the UI, such as the postal address, come from aggregating multiple fields. The attribute FormattedAddress displays the address in the UI. FormattedAddress is composed of many elements including country, state, city, province, street address, and so on. There are different fields involved in different formats for each

country, which you can review using the setup task Manage Formatted Addresses. Presumably, you want to display the changed address if any of address elements are updated. For that to happen, you must check the **Monitor for Changes** check box for all the address elements you're using and check the **Make Available for Display** check box for the FormattedAddress attribute. Here are the settings for just some of the available address fields:

Attribute	Unique Name	Make Available for Display	Monitor for Changes
Address Line 1	AddressLine1	No	Yes
Address Line 2	AddressLine2	No	Yes
Building	Building	No	Yes
City	City	No	Yes
Country	Country	No	Yes
Postal Code	County	No	Yes
State	State	No	Yes
Address	FormattedAddress	Yes	No

If you check **Make Available for Display** for any of the address components, then you'd also see an entry for that component as well. Suppose, for example, you check **Make Available for Display** for City:

Attribute	Unique Name	Make Available for Display	Monitor for Changes
City	City	Yes	Yes
Address	FormattedAddress	Yes	No

The Activities would display two lines when the city is updated. For example:

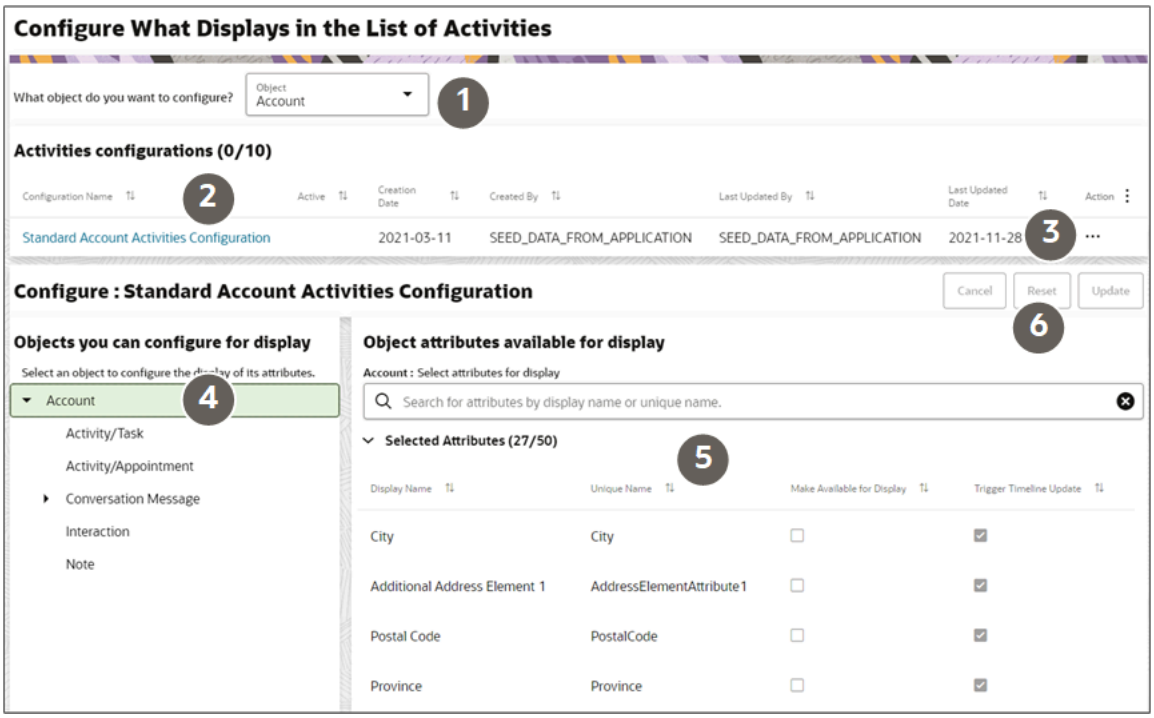
- Address changed to 100 Main Street, New York, NY 10021
- City changed to New York

Anatomy of the Configure Activities Display Page

Using the Configure What Displays in the List of Activities page, you can configure what information shows up in the list of activities for each business object and which activity updates trigger an entry in the time line. Here's an overview:

Callout	Description
1	Select the object you want to configure.
2	List of available configurations. You can have as many as 10 per object. SEED_DATA_FROM_APPLICATION indicates the configuration provided by Oracle. You can't edit the seeded configuration, but you can duplicate it and edit the duplicate.

Callout	Description
3	Actions you can take on a configuration: • Duplicate a configuration • Edit a configuration you created. • Delete a configuration you created. • Activate a configuration.
4	Select an object to view its attributes.
5	Attributes of the selected object. Those that are selected and those that are available.
6	When you edit a configuration, you can: • Save your changes by clicking **Update**. • Revert to the previous saved version by clicking **Reset**) • Discard the edits you made in the configuration by clicking **Cancel**



Create and Activate an Activities Configuration

You must create and activate an activities configuration for each object you use in Digital Sales. You create an activities configuration by duplicating an existing one. Oracle provides a predefined configuration for each object. If you want to use the predefined configuration, just copy it and activate it. If you want to change what gets displayed in Activities for an object, you can edit your copy before activating it.

You must have the Manage Feed Configurations duty role to be able to duplicate, edit, delete, and activate a configuration. Users with the Access View Feed Configurations duty role can only view the configurations.

Note:

- You can't edit or delete configurations provided by Oracle.
- You can have only one active configuration for each object.
- You can't delete an active configuration.
- You can create a maximum of 10 custom configurations for each object.
- You can enable Monitor for Changes for a maximum of 50 attributes for each object in a configuration.

1. Click **Navigator** > **Configuration** > **Configure Activities Display**.
2. Select a sales object you want to configure.
3. In the **Activities configurations** section, select an existing configuration. Oracle provides one standard configuration for each object. Look for SEED_DATA_FROM_APPLICATION in the **Created By** column.
4. In the Action column (the last column on the right), click **Actions** (three dots) and select **Duplicate**.
5. In the Duplicate dialog, enter a name for your configuration and an optional description.
6. Click **Duplicate**.
7. Click on the new configuration name to display its attribute setup.
8. If you want to use the configuration provided by Oracle, then skip steps 9 through 11 and activate the configuration as described in step 12.
9. If you want to change the way attributes display first, then click **Actions** and select **Edit**.
10. Configure the attributes:
    a. Select one of the objects you want to configure for display on the left pane.
    b. In the right pane, locate the attribute you want to update and set the two parameters:
        - **Make Available for Display**: makes a field available for display on the UI.
        - **Monitor for Changes**: monitors the field for updates.
11. When you're done, click **Update**.
12. To make your configuration active, click **Actions** (the three dots) and select **Activate**. You must then confirm that you want to activate.

Use **Actions** (the three dots) menu to activate, delete, duplicate, and update your configurations.

Related Topics

- How You Determine What Shows Up in Activities
- Anatomy of the Configure Activities Display Page

How do I enable the list of activities in each record in Oracle Sales in the Redwood User Experience?

When you set up Oracle Sales in the Redwood User Experience for the first time – and each time you import new sales records – you must run the **Publish Feed Elements** scheduled process to enable the Activities panel and subview for each record. The process publishes the indexes required for Oracle Adaptive Search to track activities for all objects that have activities enabled. You can't run the process separately for individual objects.

Which Records Get Populated with Activities

The Publish Feed Elements process populates activities in records that meet the following criteria:

Object	Criteria
Lead	Lead status equals Unqualified or Qualified and the lead was updated in the last 180 days
Opportunity	Opportunity status is Open and the opportunity was updated in the last 300 days
Account	All accounts of type Customer and Prospect with any tasks and appointments added in the last 300 days
Contact	All contacts that were updated in the last 300 days.

The process also populates activities for child objects of the objects that meet the above criteria:

Lead Objects

Child Object	Criteria
Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 60 days from current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold. All tasks in the Completed status that passed a due date 60 days from current date.
Notes	All available notes that were created or updated in the last 60 days.
Audit Log	Audit log that shows the Created By and Updated By information for the Lead record.

Contact Objects

Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 180 days from the current date.

Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold. All tasks in Completed status that has passed the due date 180 days from current date
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Contact record.

Opportunity Objects

Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 180 days from current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold.
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Opportunity record.

Account Objects

Activity Type = Appointment	All activities of type Appointment that haven't passed the due date. All activities of type Appointment that have passed a due date 180 days from current date.
Activity Type = Task	All activities of type Task that have the following status: Not Started, In Progress, and On Hold.
Notes	All available notes that were created or updated in the last 180 days.
Audit	Audit log that shows the Created By and Updated By information for the Account record.

Service Request Objects

Audit	Audit log that shows the Created By and Updated By information for the service request record.
Messages	All service request messages of the following types: • Customer Entry • Response • Internal Note • Forwards • System Note • System Response
Interactions	Interactions for all SRs where StatusCd = "ORA_SVC_CLOSED" AND ChannelTypeCd IN ["ORA_SVC_CHAT","ORA_SVC_PHONE"]

Update the Initial Run Date to Ensure Your Records Are Processed

The Publish Feed Elements process uses the date that you first run the process to identify which records to index. For example, only leads that were updated in the last 180 days before the run date are indexed. If you first ran this process on 2023-06-30, then the all the leads in the prior180 days are processed (leads from 2023-01-01 to 2023-06-30). If you're running the process more than 180 after the initial run date, then your records won't get processed unless you update the stored run date. Here's how to update the date:

1. Open Setup and Maintenance.
2. Open the side panel and click Search.
3. Search for the task Manage Profile Options and open it.
4. On the Manage Profile Options page, and in the Search results section, click New (the plus sign).
5. In the Create Profile Option page, make the following entries:

Field	What to Enter
Profile Option Code	ZCA_FEED_DAY0_START_DATE
Profile Display Name	Day 0 Start Date
Application	Common CRM
Module	Common CRM

6. Click **Save and Close**.
7. Open the **Manage Administrator Profile Values** task.
8. Search for the profile option you just created by its code: ZCA_FEED_DAY0_START_DATE.
9. In the Profile Values section, enter a more recent date in the format: YYYY-MM-DD, for example: 2024-06-30.
10. Click **Save and Close**.

How to Run the Publish Feed Elements Process

Note: You must run this process once during initial Sales setup and any time you import sales data that create records in your Sales application.

1. Click **Navigator** > **Tools** > **Scheduled Processes**.
2. On the Scheduled Processes Overview page, click **Schedule New Process**.
3. Leave the type as **Job**.
4. In the **Name** field, type **Publish Feed Elements**, and press **Enter**.
5. Make sure that the **Production to Test Enabled** checkbox is unselected. You use this option only if you want to migrate the activity indexes from production to test as part of your data migration.
6. Continue to the next steps. You can also skip to the steps and submit to run the process once as soon as possible with the default output.

Migrate Index of Activities from Production to Test

If you want to migrate the index created for activities from your production environment to a test environment, you must run the Publish Feed Elements process in the production environment with the Production to Test Enabled check box selected.

Before you run the Publish Feed Elements process in the production environment, make sure you completed the following:

- You set up activities in the environment as outlined in the *Overview of Activities Setup*.
- You created an activities configuration in both production and test.
- You ran the Publish Feed Elements process in the test environment.

Note: If Data Masking is enabled during the Production to Test process, all your activities generated for the objects are deleted. You must run the Publish Feed Elements process again after the production to test process completes to populate the activity stream with the masked data.

Related Topics

- How do I enable the list of activities in each record in Oracle Sales in the Redwood User Experience?
- Create and Activate an Activities Configuration

Natural-Language Filtering for Activities

You can make it possible for salespeople to use English-language expressions in the Action Bar to filter the list of activities. For example, entering "filter my tasks due tomorrow", displays all the tasks due by the end of the calendar day in your time zone where you are listed as a resource. Entering "filter communications about pricing", displays all emails threads and phone logs with the keyword pricing.

Without the natural language processing, you must select one of the predefined filters and then use keywords for the rest of the search.

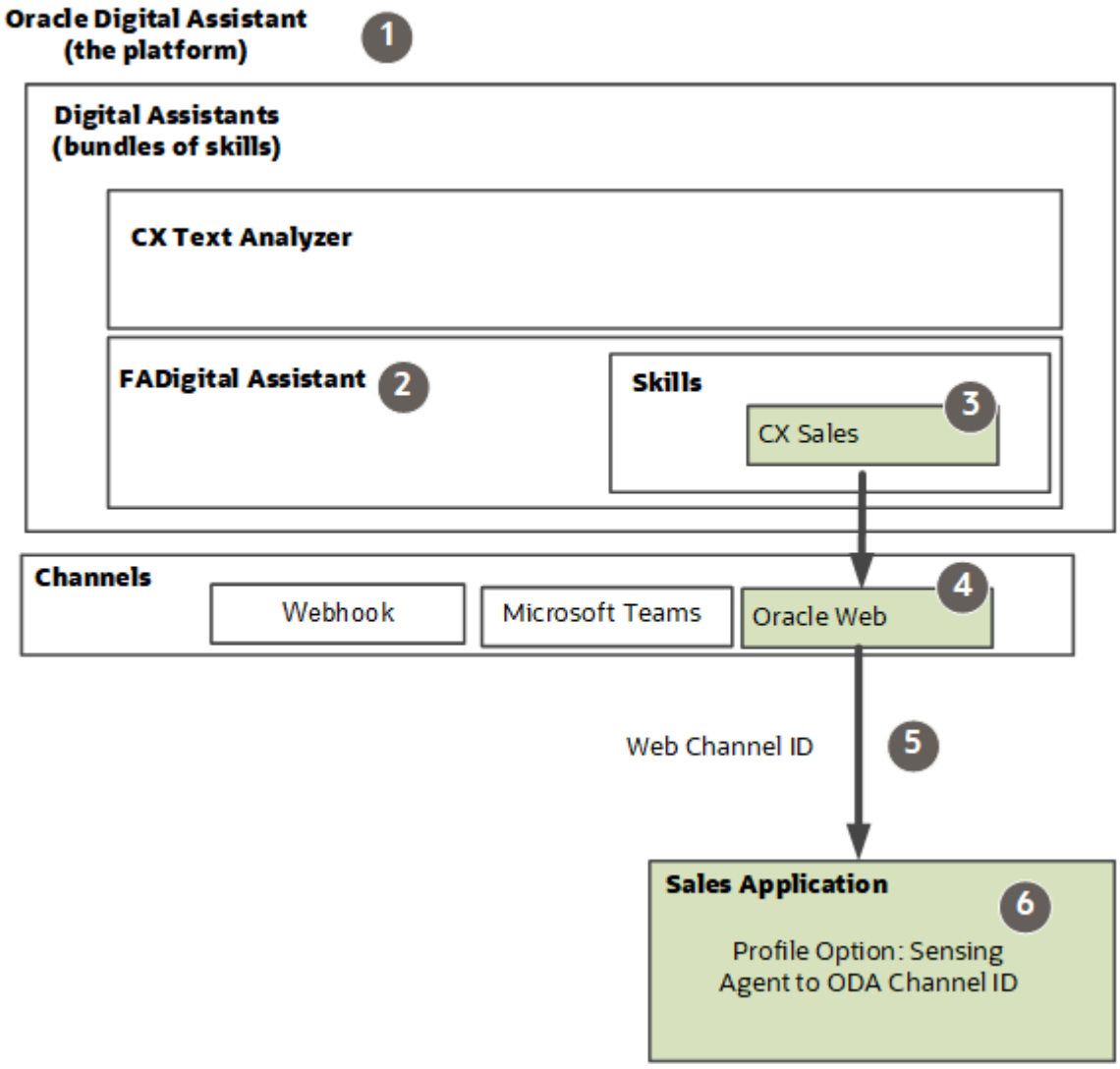
Oracle Digital Assistant and Activity Filtering

Natural language filtering uses the text analysis features of Oracle Digital Assistant (ODA) just like the other natural language features in Sales. Here's a brief overview of concepts and tasks to help you with your implementation.

Overview of Oracle Digital Assistant Integration Elements for Activities Filtering

Callout	Description
1	The Oracle Digital Assistant (ODA) platform that's used to create different natural language analysis skills. The skills are bundled into Digital Assistants.
2	For activities filtering, you use the FADigitalAssistant digital assistant.

Callout	Description
3	FADigitalAssistant includes multiple skills, including CX Sales, Help Desk, and HCM Knowledge. For activities filtering, you use the CX Sales skill.
4	You connect the skills in ODA to the sales application, by creating different types of channels. For activities filtering, you create an Oracle Web channel.
5	After you create and activate the channel, you copy its Web Channel ID.
6	You paste the Web Channel ID into the profile option Sensing Agent to ODA Channel ID (ORA_ZCA_SENS_ODA_CHANNEL_ID).



Overview of Natural-Language Filtering Setup for Activities

Here's an overview of the setup tasks that make it possible for salespeople to use the English language to filter activities.

Here's an overview of the setup tasks.

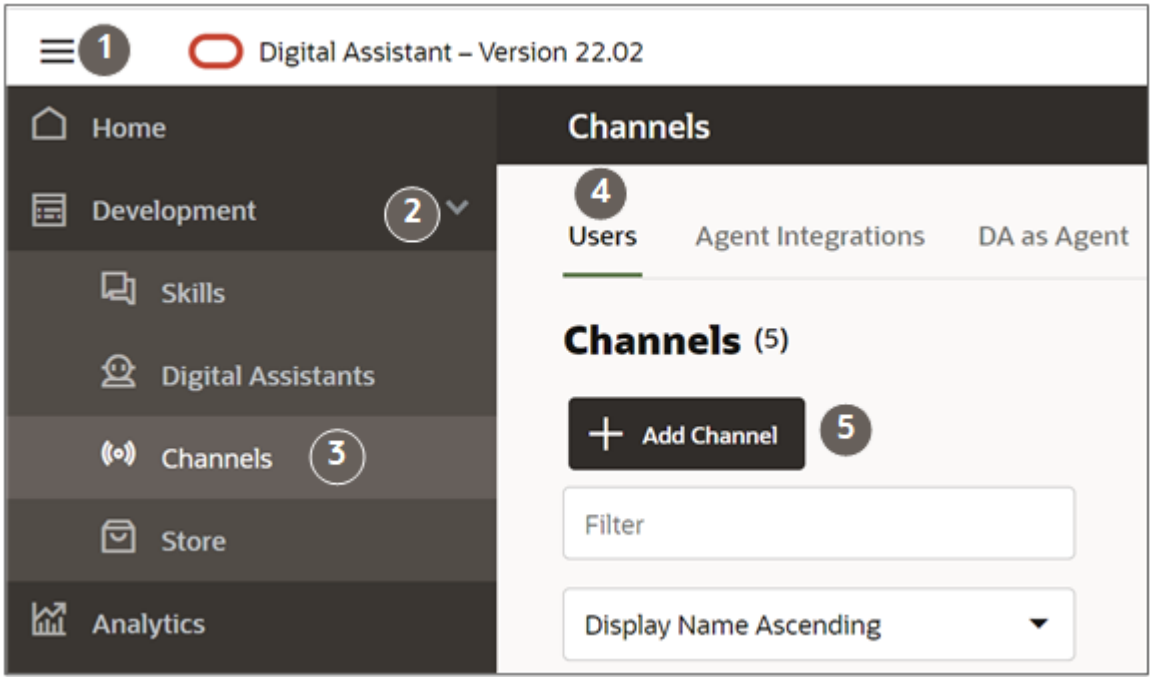
Step	Setup Task	Application	Description	Where to Get More Details
1	Complete the prerequisite Oracle Digital Assistant application setup.	Oracle Identity Cloud Service (IDCS)	Before you set up any of the features that use natural language processing, you must perform some prerequisite setup of Oracle Digital Assistant: • Set up administrator users • Obtain the ODA URL • Install (pull) the FADigitalAssistant. • Enable the Digital Assistant used for Oracle Fusion Cloud Applications	See the topic: *Overview of Common ODA Setup for Sales*.
2	Create the Oracle Web channel to sales	Oracle Digital Assistant	Create the Oracle Web channel that enables the analysis of the text salespeople enter in the Action Bar. After you create the channel, you copy the Webhook URL. You need it for the next step.	See the topic: *Create an Oracle Web Channel*
3	Associate the Oracle Web channel that you created to the sales application.	Sales application	Paste the Web Channel ID into the profile option Sensing Agent to ODA Channel ID (ORA_ZCA_SENS_ODA_CHANNEL_ID).	See the topic: *Enter the Channel ID into a Profile Option to Enable Activity Filtering*

Create an Oracle Web Channel

Create an Oracle Web channel to send what salespeople enter in the Action Bar to Oracle Digital Assistant for natural-language processing.

1. Navigate to the Setup and Maintenance work area and select the **Sales** offering.
2. In the **Functional Areas** pane, click **Digital Assistant**.
3. In the **Task** pane, click the **Manage Digital Assistant** task.

4. On the Oracle Digital Assistant home page, click the **Navigator** (the hamburger menu highlighted by callout 1).



5. Expand the Development menu item (callout 2).
6. Click **Channels** (callout 3).
7. Make sure that the **Users** tab is selected (callout 4).
8. Click **Add Channel** to open the Create Channel window.
9. Make these entries in the Create Channel window:
    a. Give your channel a name.
    b. Select **Oracle Web** as the channel type.
    c. In the **Allowed Domains** field, enter ***.
    d. Turn off **Client Authentication Enabled**
    e. Click **Create**.
10. In the **Route To** field, select the **CX Sales** skill from the FADigital Assistant that you pulled from the store earlier.
11. Scroll to the **Channel ID** field and copy the value. You must enter the value in the profile option Sensing Agent to ODA Channel ID (ORA_ZCA_SENS_ODA_CHANNEL_ID).
12. Turn on **Channel Enabled** at the top of the page.

Enter the Channel ID into a Profile Option to Enable Activity Filtering

To enable the activity filtering, enter the Channel ID from the Oracle Web channel you created in the profile option Sensing Agent to ODA Channel ID (ORA_ZCA_SENS_ODA_CHANNEL_ID).

Before you start

Create the Oracle Web channel.

1. In the Setup and Maintenance work area, open the **Manage Administrator Profile Values** task.
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. In the search region of the Manage Administrator Profile Values page, enter the profile option code name ORA_ZCA_SENS_ODA_CHANNEL_ID in the **Profile Option Code** field.
3. Click **Search**.
4. Click on the profile option name in the search results.
5. Paste the channel ID into the **Profile Value** field.
6. Click **Save and Close**.

36 Sales Recommendations

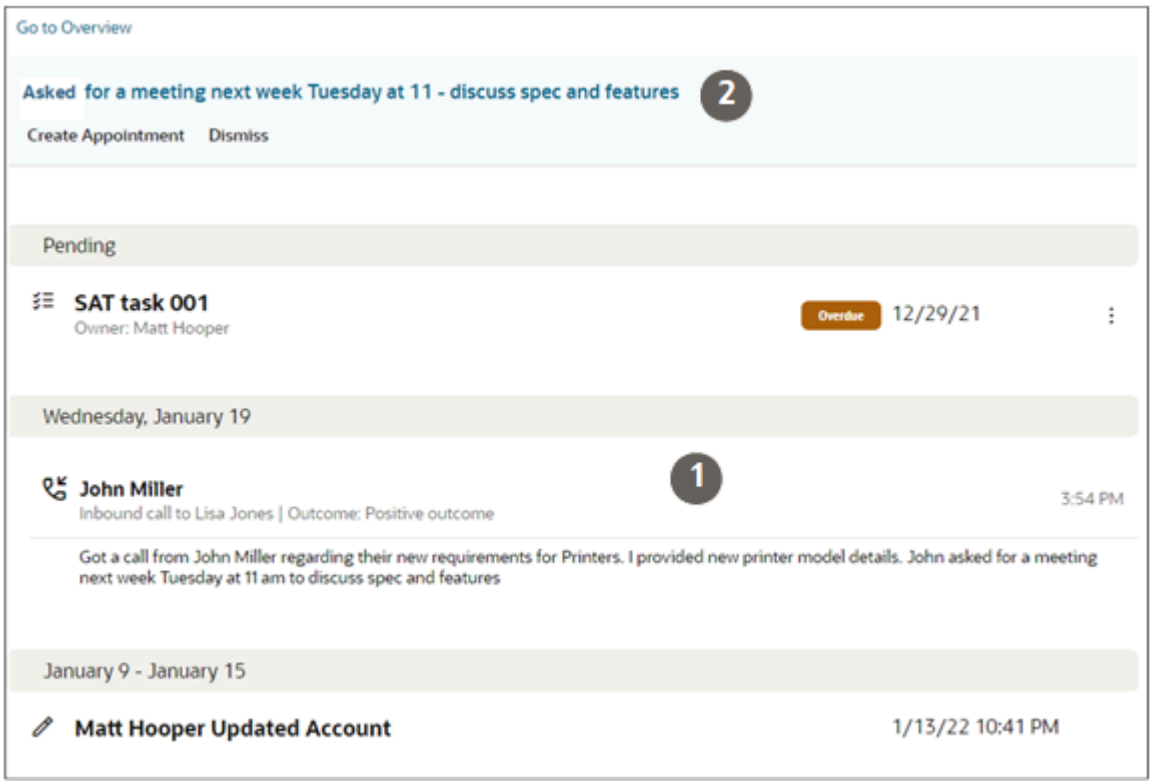
Recommended Actions from Text Analysis

When you enable sales recommendations, the application analyzes the English-language text in notes and call logs and recommends appropriate follow-up actions. An action can be to create a task, an appointment, or a contact, depending on the text that was entered. The recommendations appear at the top of the Activities panel and page where salespeople can either accept or dismiss them. You can enable the same sales recommendations you set up here for CX Sales Mobile with minimal additional setup. At present, the sales recommendations feature and other natural-language processing features are available in English only.

Suppose, for example, that a salesperson enters "asked for a meeting next Tuesday at 11" in a call wrap-up and saves. Based on the text, the application suggests the creation of an appointment.

This screenshot shows the recommended appointment viewed in the Activities page in Digital Sales. The CX Sales Mobile app works very much the same way.

- The recommendation (callout 2)
- The text on which it was based (callout 1)



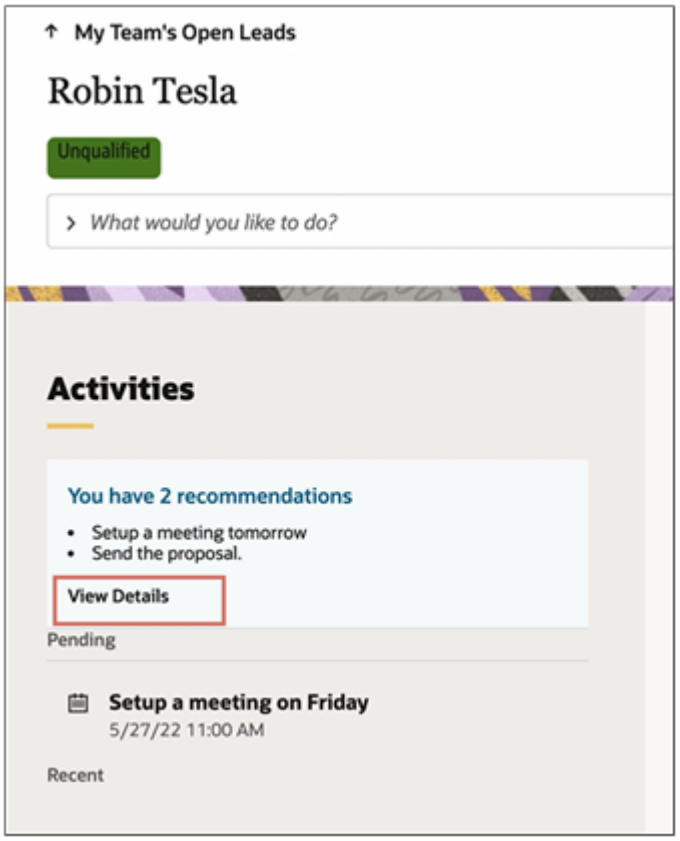
Salespeople can either create the appointment or click **Dismiss** to reject the recommendation and remove it from view. The application schedules the appointment at the time specified in the text and in the salesperson's time zone. The appointment includes the relevant text from the call wrap-up.

When enabled, this feature replaces the automatic creation of a task after call wrap ups.

Multiple Recommendations

If salespeople receive multiple recommendations either, they can review and act on them one by one either on the Activities pane or page by clicking the **View Details** link.

Here's a screenshot of the Activities panel on a lead listing two sample recommendations. The View Details link is highlighted.



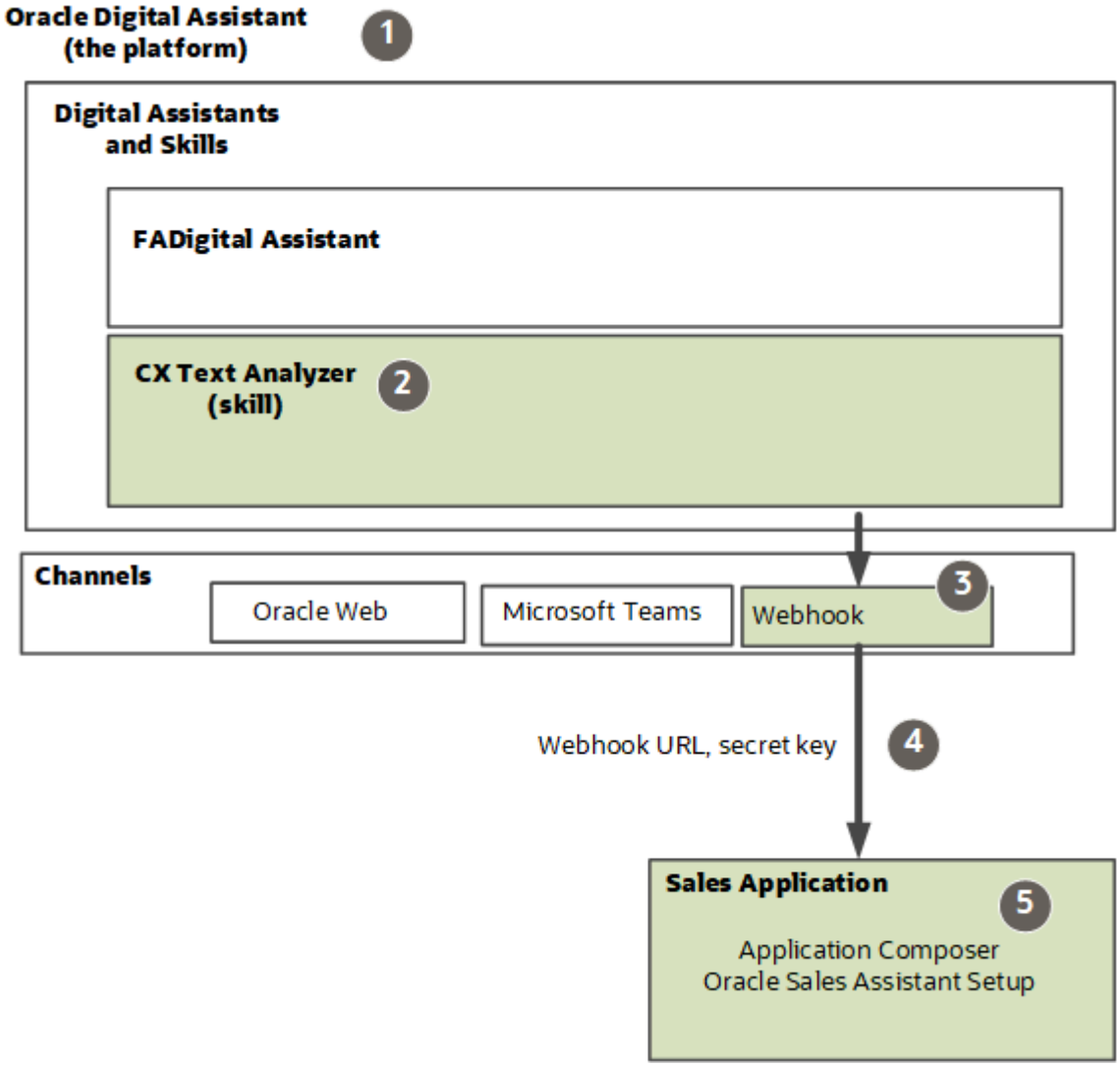
Oracle Digital Assistant and Sales Recommendations

Sales recommendations use the text analysis features of Oracle Digital Assistant (ODA). Here's a brief overview of the different features and concepts that will help you in your integration.

Overview of the Oracle Digital Assistant Integration for Sales Recommendations

Callout	Description
1	Oracle Digital Assistant (ODA) is a platform that's used to create chatbots and to provide language analysis for other applications and features. ODA is used not only by the sales recommendations feature, but also by CX Sales Mobile, and the integration with Microsoft Teams, for example.

Callout	Description
2	Different domains, such as sales, service, and financials, require different sets of language skills. Oracle bundles some of these predefined skills into digital assistants, such as FADigital Assistant. Others are available as stand-alone skills. You install both types in your ODA application instance from the ODA "store". For sales recommendations, you install (the term used is "pull") the CX Text Analyzer skill.
3	Applications integrate with the different skills through channels of different types. To integrate the CX Text Analyzer skill with the sales recommendations feature, you create a channel of type Webhook and associate the CX Text Analyzer skill to it.
4	After you create and activate the channel, you copy its Webhook URL and secret key.
5	To link the channel to the sales application, you enter the Webhook URL and secret key into Application Composer (Oracle Sales Assistant Setup, Configure Text Analysis tab).



Overview of Sales Recommendations Setup

Digital Sales uses the natural language processing capabilities of the Oracle Digital Assistant (ODA) to analyze the text of notes and tasks. This guide covers only the steps to enable the Sales Recommendations feature using the Sales skill in ODA provided by Oracle. For information on creating skills and other ODA features, you must follow the instructions in the Getting Started with Oracle Digital Assistant for Cloud Applications.

> **Note:** Sales recommendations from Sales Insights and Opportunity next best action are also available as part of central recommendations.

Here's an overview of the setup tasks.

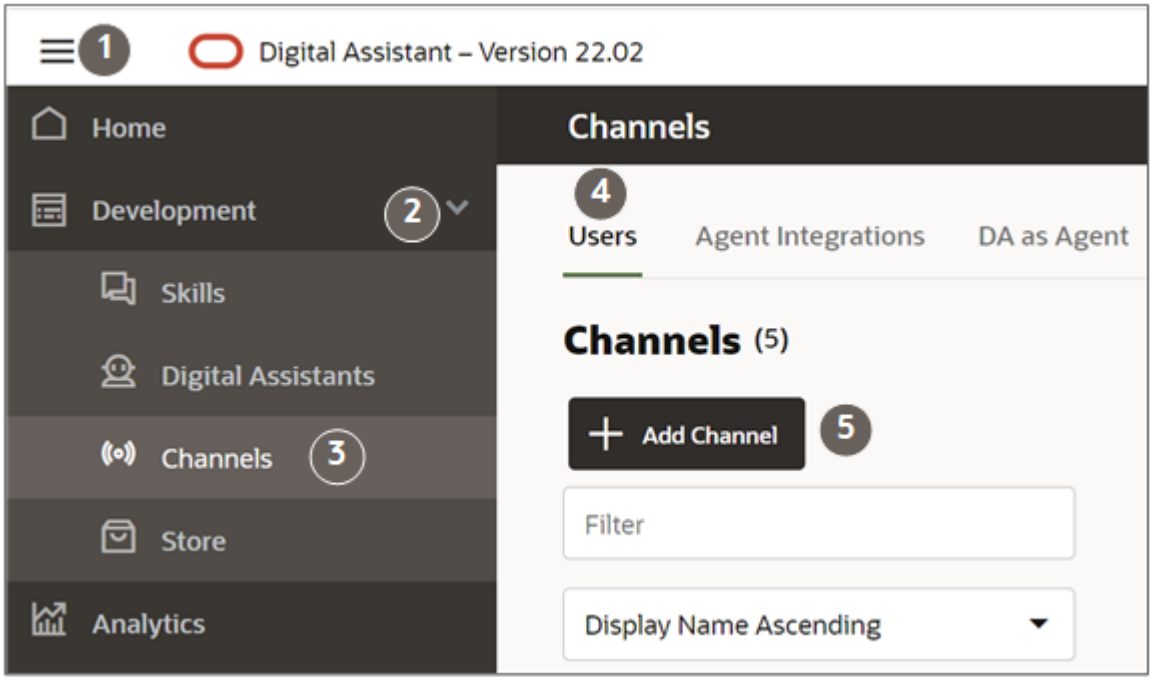
Step	Setup Task	Application	Description	Where to Get More Details
1	Complete the prerequisite Oracle Digital Assistant application setup.	Oracle Identity Cloud Service (IDCS)	Before you set up any of the features that use natural-language processing, you must perform some prerequisite setup of Oracle Digital Assistant: • Set up administrator users • Obtain the ODA URL • Install (pull) the CX Text Analyzer skill • Enable the Digital Assistant used for Oracle Fusion Cloud Applications If you already completed the setup for another feature, you can skip this step.	See the topic: *Overview of Common ODA Setup for Sales*. For additional information, see the Oracle Digital Assistant documentation: *Getting Started with Oracle Digital Assistant for Cloud Applications.*
2	Create the Webhook channel to sales	Oracle Digital Assistant	Create the Webhook channel that enables the analysis of sales text. After you create the channel, you copy the Webhook URL and secret key for use in the next step.	See the topic: *Create a Webhook Channel*
3	Associate the Webhook channel that you created to the sales application.	Sales application	Enter the Webhook URL and secret key in Application Composer (**Application Composer** > **Common Setup** > **Oracle Sales Assistant Setup** > **Configure Text Analysis**).	See the topic: *Associate the Webhook Channel to Sales and Specify Recommendation Options*

Step	Setup Task	Application	Description	Where to Get More Details
			You then enable text analysis, and disable any fields you don't want analyzed.	
4	Enable Recommendations	Sales application	Opt in to the Sales Recommendations feature.	See the topic: *Enable Sales Recommendations*

Create a Webhook Channel

Create a Webhook channel so that the meeting notes can be sent to Oracle Digital Assistant for text analysis.

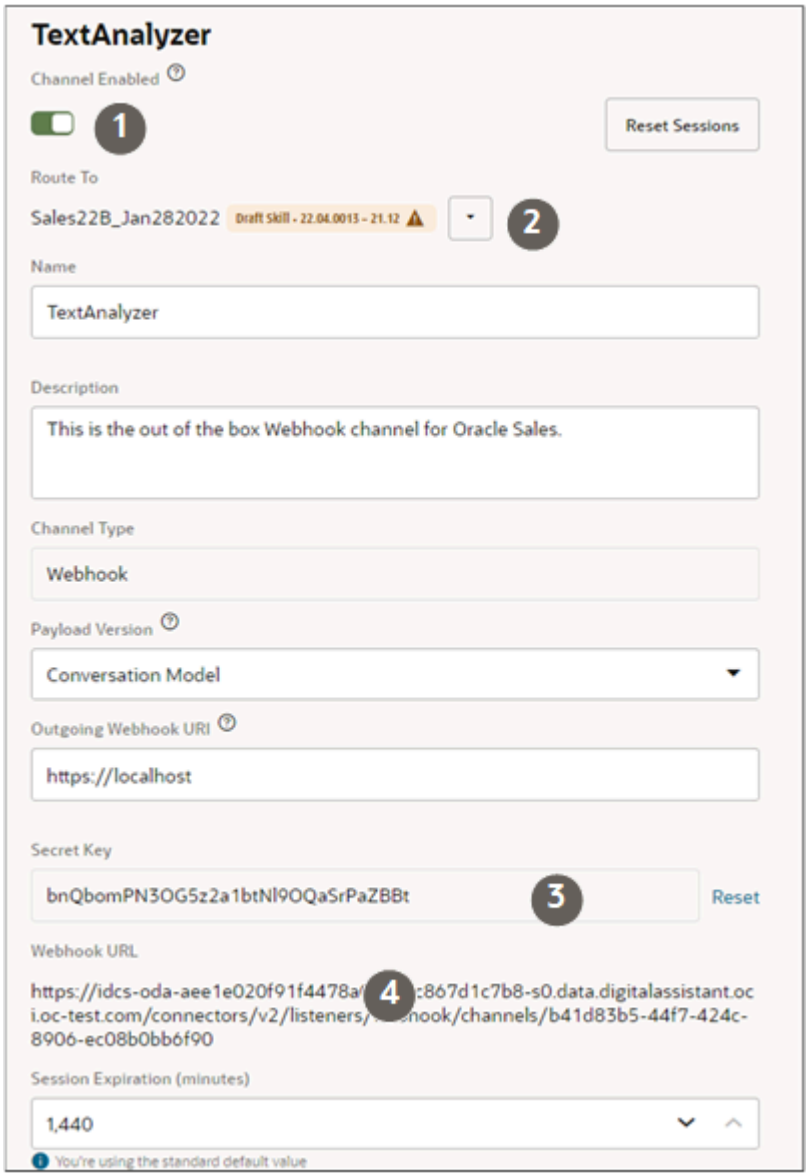
1. Navigate to the Setup and Maintenance work area and select the **Sales** offering.
2. In the **Functional Areas** pane, click **Digital Assistant**.
3. In the **Task** pane, click the **Manage Digital Assistant** task.
4. On the Oracle Digital Assistant home page, click the **Navigator** (the hamburger menu highlighted by callout 1).



5. Expand the Development menu item (callout 2).
6. Click **Channels** (callout 3).
7. Make sure that the **Users** tab is selected (callout 4).
8. Click **Add Channel** to open the Create Channel window.
9. Make these entries in the Create Channel window:
    a. Give your channel a name.
    b. Select **Webhook** as the channel type.
    c. In the **Payload Version** field, select the **Conversation Model** option.

d. Enter an arbitrary value in the **Outgoing Webhook URL** field. It doesn't matter what you enter. Just don't enter a real URL.
e. Don't change the value in the **Session Expiration** field.
f. Click **Create**.

10. In the **Route To** field, select the **TextAnalyzer** skill that you pulled from the store earlier (callout 2 in the screenshot).

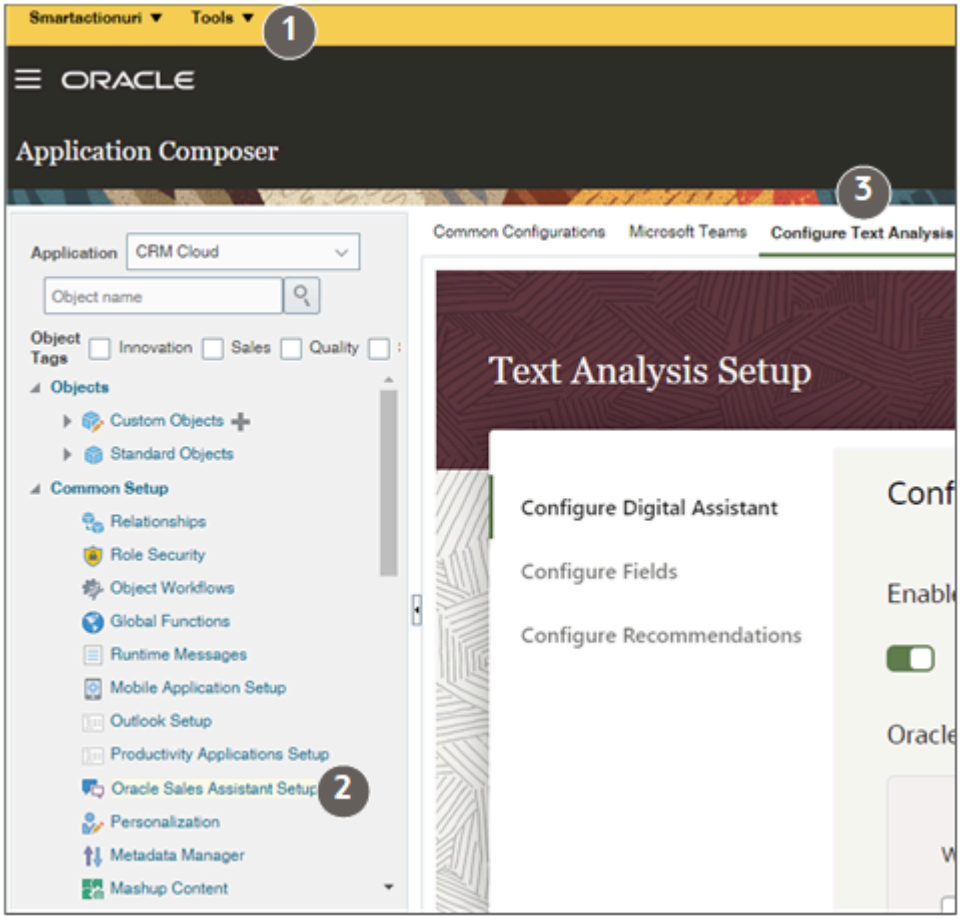


11. Scroll to the **Secret Key** (callout 3) and **Webhook URL** fields (callout 4) and copy both of the values.
12. Now enable the channel by clicking the **Channel Enabled** toggle (callout 1 in the screenshot).

Associate the Webhook Channel to Sales and Specify Recommendation Options

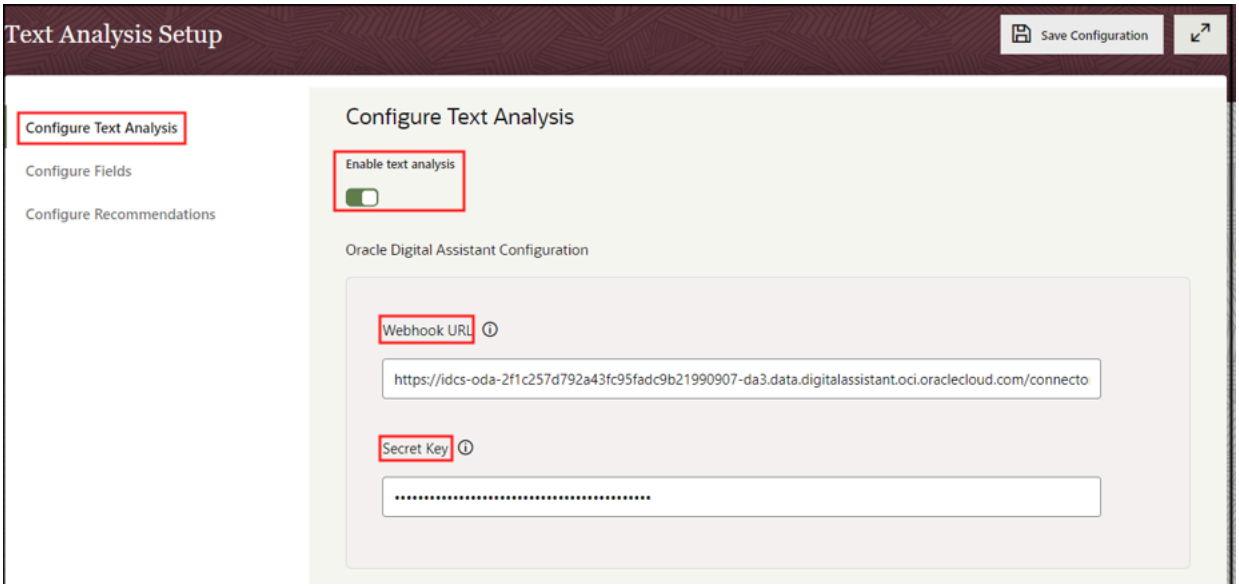
Here's how to associate the Webhook channel you created for recommendations to the sales application and how to specify which recommendations you want displayed to which audience. You can specify which fields you want analyzed and which job roles and regions will see the recommendations. By default, the application analyzes the text entered in all of the available fields to all job roles and regions.

1. Enter an active sandbox with the Application Composer as one of the available tools (callout 1 in the screenshot)
2. Open **Application Composer**.
3. Click **Oracle Sales Assistant Setup** under the Common Setup heading in the left-hand pane (callout 2 in the screenshot).



4. Click the **Configure Text Analysis** tab (callout 3).

5. On the Configure Text Analysis tab, activate the **Enable text analysis** option as highlighted in the sample screenshot.



6. Enter the Webhook URL and the secret key that you obtained when you set up the Webhook channel.
7. Click **Configure Fields**.
8. On the Configure Fields tab, specify which fields get analyzed and generate recommended actions. By default, all the available fields are enabled.
9. Next, click **Configure Recommendations** to select which recommended actions you want displayed and for whom. If your organization doesn't use appointments, you can turn off any recommendations to create appointments, for example. By default, all available recommended actions display for all salespeople.

   You can disable the action completely, or restrict availability by job role and geography. For example, you can specify that you want only sales managers in Germany to receive suggestions to create appointments. To do so, expand Create Appointment and enter Sales Manager in the roles box and Germany in the regions box.

   > **Note:** Any restrictions by job role and geography you specify here also affects the availability of recommendations in CX Sales Mobile. During CX Sales Mobile setup you can restrict availability further but the settings you make here take precedence.

10. Click **Save Configuration**.
11. You must publish the sandbox to make your changes active.

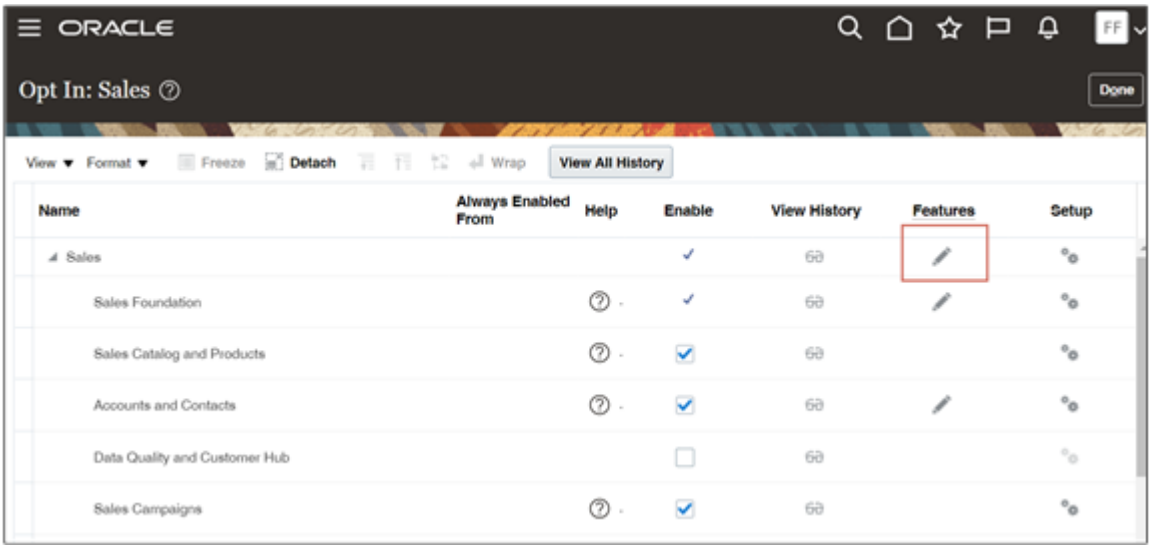
Related Topics

- Create and Activate Sandboxes

Enable Sales Recommendations

Here's how to enable sales recommendations. The sales recommendation feature analyzes text of notes and call logs and recommends follow-up tasks and appointments. When enabled, this feature replaces the automatic creation of a task after call wrap ups.

1. Open the **Setup and Maintenance** work area and select the Sales offering.

2. In Setup: Sales, click the **Change Feature Opt In** link.
3. In the Opt In: Sales page, click **Features** for Sales (the pencil icon in the topmost row highlighted in the screenshot).
4. 

5. Select **Enable** for **Sales Recommendations**.
6. Click **Done**.

Turn Off Unwanted Recommendations

You can turn off sales recommendations for features that you don't use in your implementation in Application Composer Sales Assistant Setup. For example, if you don't use appointments, you can disable recommendations to create appointments.

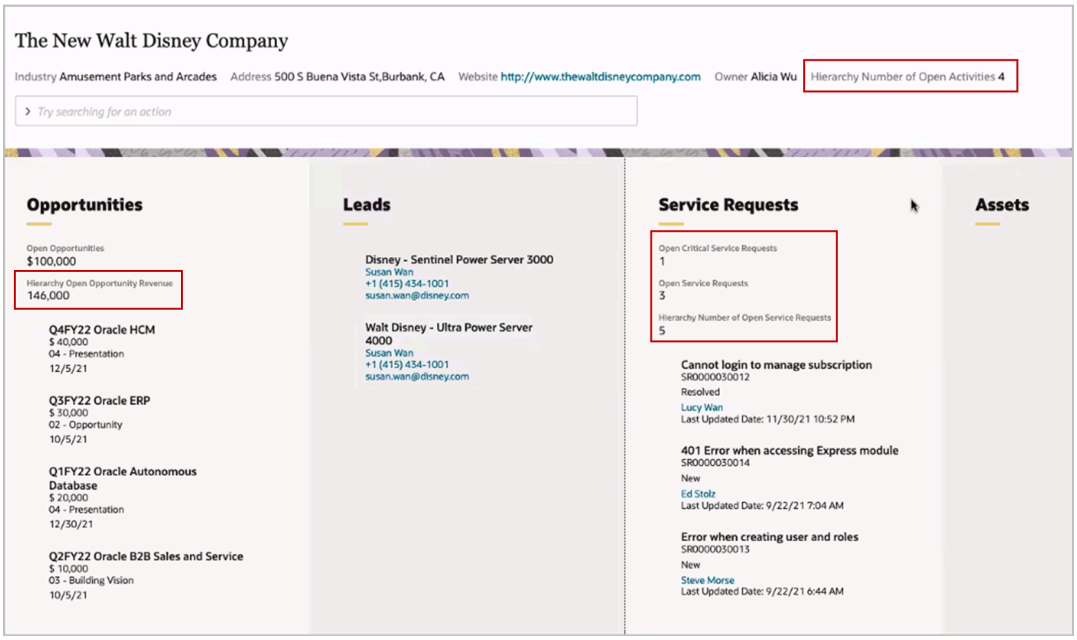
For navigation details, see the topic: *Associate the Webhook Channel to Sales and Specify Recommendation Options*

37 Rollups

What are rollups?

Rollups summarize data. For example, a rollup can calculate the sum of the potential revenue from the opportunities for an account hierarchy.

Rollup calculations appear on top of the panels. This screenshot shows Opportunities and Service Requests rollups:



In Sales, the calculated value of a rollup appears in the object detail page. Here's a screenshot of an account in Sales, showing rollup attributes. This screenshot shows the Rollups tab on the left pane and the rollup attributes shown in a table:



Note: The Rollups feature replaces the predefined aggregated fields that were available in previous releases for search criteria for your Workspace summarized data.

The sales application provides these predefined rollups:

Predefined Rollup	Relationship	Rollup Value
Total Number of Employees	Account only	The total number of employees in an account and its hierarchy
Fiscal Year Total Potential Revenue	Account only	The current fiscal year potential revenue from an account and its hierarchy
Decision Maker Contacts	Account to Contact	The total number of decision maker contacts
Total Open Leads	Account to Sales Lead	The total count of the qualified and unqualified open leads of an account and its hierarchy
Total Open Hot Leads	Account to Sales Lead	The total count of the qualified and unqualified hot leads of an account and its hierarchy
Qualified Hot Leads	Account to Sales Lead	The count of leads that are qualified and hot

Qualified Leads	Account to Sales Lead	The count of leads that are qualified
Potential Revenue from Open Leads	Account to Sales Lead	The total potential revenue from open leads
Total Open Critical Service Requests	Account to Service Request	The total count of the open, critical service requests that are in the new, in-progress, or waiting status of an account and its hierarchy
Total Open Service Requests	Account to Service Request	The total count of service requests that are in the open, in-progress, and waiting statuses, associated with an account and its hierarchy
Service Requests Closed in the Past Week	Account to Service Request	The count of Service Requests with the close date failing in the past 7 days
Total Amount from Open Opportunity Quotes and Orders	Account to Quotes and Orders	The sum of amounts from the open and in-progress opportunity quotes and orders of an account and its hierarchy
Total Open Activities	Account to Activity	The total count of open tasks of an account and its hierarchy
Total Potential Revenue from Open Opportunities	Account to Opportunity	The sum of the potential revenue from the open opportunities of an account and its hierarchy
Total Potential Revenue from Won Opportunities	Account to Opportunity	The sum of the potential revenue from the won opportunities of an account and its hierarchy
Total Open Opportunities	Account to Opportunity	The total count of open opportunities of an account and its hierarchy
Total Amount from Closed Opportunity Quotes and Orders	Account to Opportunity	The sum of the amount from the closed and won opportunity quotes and orders of an account and its hierarchy
Next Opportunity Closing Date	Account to Opportunity	The date when the next opportunity is expected to close
Last Call Made	Account to Interaction	The date when your team made a phone call to any of the contacts associated with an account or its hierarchy
Total Calls Made	Account to Interaction	The total number of phone calls made to an account and its hierarchy
Last Email Sent	Account to Interaction	The date when the last email was sent to any of the contacts associated with an account or its hierarchy
Total Emails Sent	Account to Interaction	The total number of emails sent to an account and its hierarchy
Total Touches	Account to Interaction	The total number of calls made or emails sent to an account and its hierarchy
Last Touch	Account to Interaction	The date when an account and its hierarchy were last contacted, either by email or phone

Total Number of Open Leads Associated with a Contact	Contact to Sales Lead	The total number of qualified and unqualified open leads associated with a contact
Total Number of Open Hot Leads Associated with a Contact	Contact to Sales Lead	The total number of qualified and unqualified hot leads associated with a contact
Total Number of Open Opportunities Associated with a Contact	Contact to Opportunity	The total number of open opportunities associated with a contact
Sum of Open Opportunities Revenues Associated with a Contact	Contact to Opportunity	The cumulative total of revenue from the open opportunities associated with a contact
Total Number of Open Service Requests Associated with a Contact	Contact to Service Request	The total number of service requests that are in the open, in progress, or waiting statuses
Total Number of Critical Open Service Requests Associated with a Contact	Contact to Service Request	The total number of service requests in the open, in progress, or waiting statuses, marked as critical
Total Number of Touches with a Contact	Contact to Interaction	The total number of emails sent or calls made to a contact in the last 120 days
Date of Last Touch with a Contact	Contact to Interaction	The date when the last email was sent or call was made to a contact in the last 120 days
Total Number of Calls Made to a Contact	Contact to Interaction	The total number of phone calls made to a contact in the last 120 days
Total Number of Emails Sent to a Contact	Contact to Interaction	The total number of emails sent to a contact in the last 120 days
Last Call Made to a Contact	Contact to Interaction	The date when the last outbound phone call was made to a contact in the last 120 days
Last Email Sent to a Contact	Contact to Interaction	The date when the last email was sent to a contact in the last 120 days
Date of Last Response from a Contact	Contact to Interaction	The date when a last email or call was received from a contact in the last 120 days
Total Number of Responses Received from a Contact	Contact to Interaction	The total number of calls or emails received from a contact in the last 120 days
Total Number of Open Activities for a Contact	Contact to Activity	The cumulative total of: • Tasks that are open and not in completed or canceled status • Recurring or nonrecurring appointments with the current date as the start date • Call reports ending on the current date
Last Touch Date	Sales Lead to Interaction	The date when the last call or email was sent in the context of a lead
Last Call Made	Sales Lead to Interaction	The date when the last call was made in the context of a lead
Total Call Made	Sales Lead to Interaction	The total number of calls made in the context of a lead
Total Emails Sent	Sales Lead to Interaction	The total number of emails sent in the context of a lead
Total Touches	Sales Lead to Interaction	The total number of emails and calls made in the context of a lead

Last Email Sent	Sales Lead to Interaction	The date when the last email was sent in the context of a lead
Total Open Activities	Sales Lead to Interaction	The cumulative total of: • Tasks that are open and not in completed or canceled status • Recurring or nonrecurring appointments with the current date as the start date • Call reports ending on the current date
Total Open Opportunities	Campaign to Opportunity	The total number of open opportunities associated with a campaign
Total Won Opportunities	Campaign to Opportunity	The total number of won opportunities associated with a campaign
Total Revenue from Opportunities	Campaign to Opportunity	The total revenue from the open opportunities associated with a campaign
Total Opportunities	Campaign to Opportunity	The total number of opportunities associated with a campaign
Total Revenue from Open Opportunities	Campaign to Opportunity	The total revenue from the open opportunities associated with a campaign
Total Revenue from Won Opportunities	Campaign to Opportunity	The total revenue from the won opportunities associated with a campaign
Total Converted Leads	Campaign to Sales Lead	The total number of converted leads associated with a campaign
Total Leads	Campaign to Sales Lead	The total number of leads from a campaign
Total Hot Open Leads	Campaign to Sales Lead	The total number of unqualified or qualified leads ranked as hot that are associated with a campaign
Total Open Leads	Campaign to Sales Lead	The total number of unqualified or qualified open leads associated with a campaign
Total Revenue from Open Leads	Campaign to Sales Lead	The total amount from the unqualified and qualified leads associated with a campaign
Total Emails Sent	Opportunity to Interaction	The total number of emails sent in the context of an opportunity
Total Touches	Opportunity to Interaction	The total number of email and calls made in the context of an opportunity
Last Email Sent	Opportunity to Interaction	The date when the last email was sent in the context of an opportunity
Total Calls Made	Opportunity to Interaction	The total number of calls made in the context of an opportunity
Last Call Made	Opportunity to Interaction	The date when the last call was made in the context of an opportunity
Last Touch Date	Opportunity to Interaction	The date when the last call or email sent in the context of an opportunity
Total Open Activities	Opportunity to Activity	The cumulative total of: • Tasks that are open and not in completed or canceled status • Recurring or nonrecurring appointments with the current date as the start date • Call reports ending on the current date

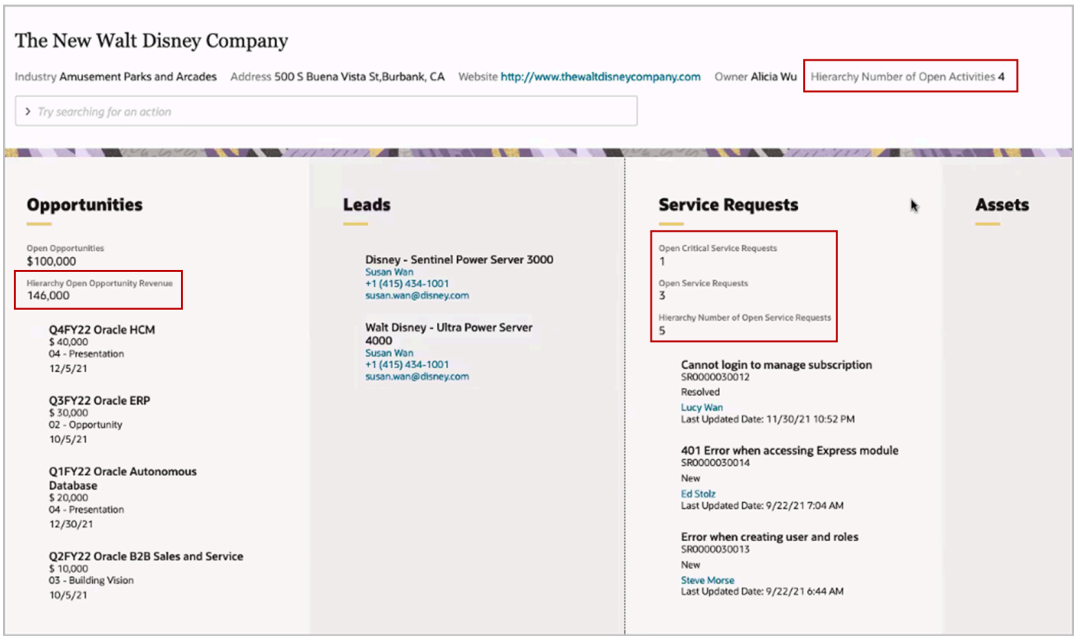
Where Salespeople See Rollups

Salespeople can see rollups in three different ways:

- On panels in work areas
- As search criteria
- As group-by options

Rollups on Panels

Rollups display on panels in Digital Sales work areas, such as Accounts, so that your sales team gets quick insights. The screenshot shows the Rollups tab on the left pane and the rollup attributes shown in a table.



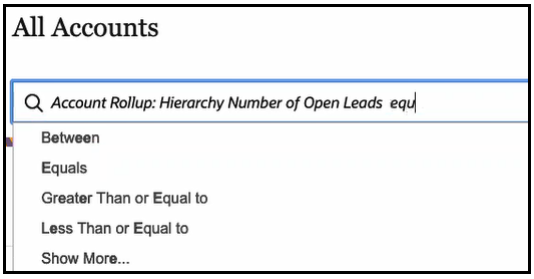
In CX Sales, salespeople can see rollups in the Rollups subtab on the object pages you enable. This screenshot shows the Rollups tab on the left pane and the rollup attributes shown in a table:



Rollups as Search Criteria

You can enable using rollups as search criteria on the landing pages. This helps salespeople search for accounts and contacts based on a rollup value.

Here's a screenshot of the Accounts landing page that shows an example of searching for accounts based on the hierarchy number of open leads:

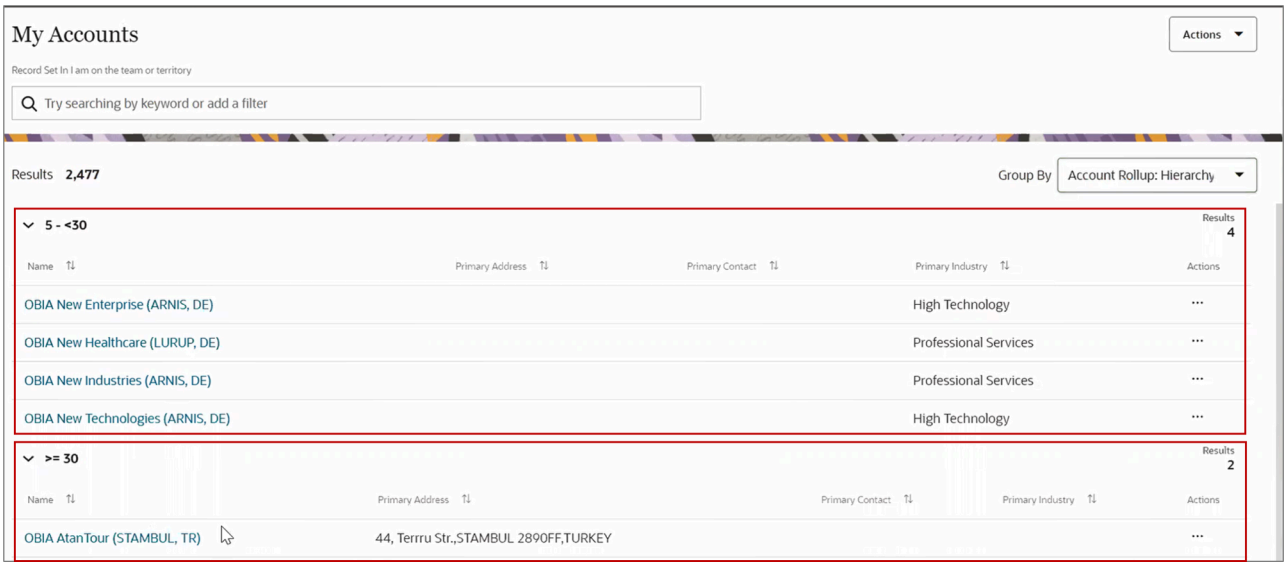


In CX Sales, salespeople can use rollups as search criteria in Workspace.

Rollups as Group By Options

You can help sales team find accounts and contacts that belong to a similar grouping based on rollups.

Here's a screenshot that shows four account hierarchies with 5 to 30 open opportunities and two accounts that have more than 30 opportunities:



Setup Tasks

What are the steps to set up rollups?

Here's a summary of how to define rollups for Sales. All the privileges, setups, and tasks involved in setting up rollups for both the classic and Oracle Sales in the Redwood User Experience is provided.

This table provides the initial setup steps for rollups, navigation, brief description, and where to get more details.

Step	Applies To	Description	Navigation	Where to Get the Details
1	Both classic and Sales in Redwood UX	Add the Manage Rollup Metrics privilege to a copy of the Sales Administrator job role (ORA_ZBS_SALES_ADMINISTRATOR_JOB). To the role, add users responsible for configuring and setting up rollups.	**Navigator** > **Tools** > **Security Console** > **Roles**	See the Edit Job or Abstract Roles topic in the Securing Sales and Fusion Service guide for more information.
2	Both classic and Sales in Redwood UX	Verify that these scheduled processes appear on the Scheduled Process page: • Rollup Full Refresh • Rollup Account Hierarchy and Linked Records Refresh • Rollup Incremental Refresh	**Navigator** > **Tools** > **Scheduled Processes**	See the Run Scheduled Processes for Rollups topic in the Implementing Sales guide for more information. See also the Scheduled Processes chapter of the Understanding Scheduled Processes guide.

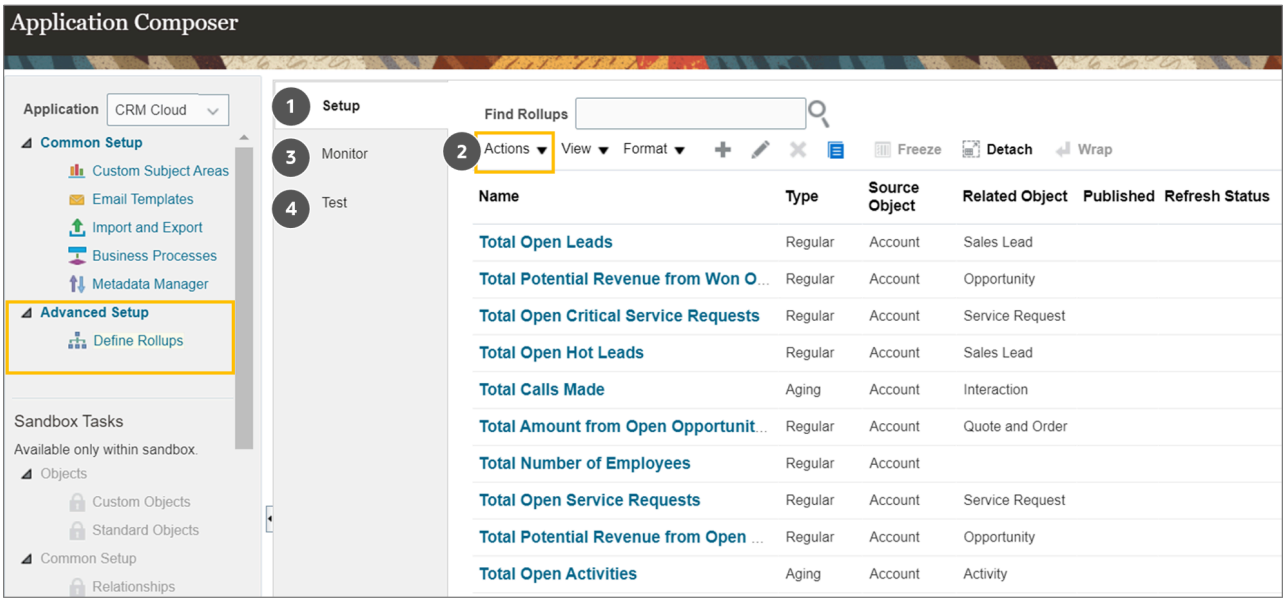
Step	Applies To	Description	Navigation	Where to Get the Details
		When you unpublish or delete a rollup, the Data Cleanup scheduled process prompts you to clear the data.		
2	Both classic and Sales in Redwood UX	After adding the privileges for the users, they get access to the Rollups setup page. Enable the **Rollup Test Enabled** profile option (ORA_ZCA_TEST_ROLLUPS), to display the Test tab on the Rollups setup page.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Manage Administrator Profile Values**	See the Test and Publish the Rollups topic in the Implementing Sales guide for more information.
3	Both classic and Sales in Redwood UX (optional)	When creating new rollups, you can reuse the rollup attributes of unpublished rollups or create custom attributes and publish them. The custom attributes will be available on the Rollups setup page.	**Application Composer** > **Standard Objects** > **Account** > **Account Rollups** > **Fields** Navigation is similar for contact rollups and other object rollups.	See the information on defining fields in the *Configuring Applications Using the Application Composer* guide.
4	Classic user experienc (Preferre	Use the formula fields instead of a regular field to create a custom attribute for rollups. Unlike regular fields, formula fields let you build a script with rules related to calculations.	Application Composer	See the Configure Custom Rollups Using the Formula Fields topic in the Implementing Sales guide for more information.
5	Classic user experienc (Optional	When creating rollups that depend on fiscal year periods, such as current quarter, use the accounting calendar periods. The accounting calendar defines the fiscal year and the time periods within it.	Related Object Filter on the Define Rollups setup page.	See the Use the Accounting Calendar Time Periods for Your Rollups topic in the Implementing Sales guide for more information.
6	Sales in Redwood UX	Use the Visual Builder Studio to add custom rollups to Sales in Redwood UX pages. You can also show the rollups on the panels in Sales in Redwood UX.	**Settings and Actions** > **Edit Page in Visual Builder**	See these topics in the Extending Sales in the Redwood user experience guide: • Add a Custom Field to the Edit Contact Page • Configure the Rollups Region in a Panel To access this guide, contact your Oracle representative.
7	Classic user experienc	Enable the Rollups subtab on object pages in the Classic user experience.	Application Composer	See the Show Rollup Attributes on the Object Pages topic in the Implementing Sales guide for more information.
8	Both classic and Sales in Redwood UX (Optional	Enable rollups for Adaptive Search. Let salespeople search accounts or contacts using rollups as search criteria.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Configure Adaptive Search**	See the Enable Searching for Accounts and Contacts Using Rollups topic in the Implementing Sales guide for more information.
9	Sales in Redwood UX (Optional	Enable Rollups as group by options so that salespeople can use them to group accounts and contacts by common attributes.	**Setup and Maintenance** > **Sales** > **Sales Foundation** > **Configure Adaptive Search**	See the Enable Grouping by Rollups topic in the Implementing Sales guide for more information.

Here's the navigation to the Rollups setup page:

1. Go to **Navigator** > **Configuration** > **Application Composer**.
2. Under **Advanced Setup**, click **Define Rollups**.

> **Note:** You don't need to be in a sandbox to access the Define Rollups page.

Here's a sample screenshot of the Define Rollups page:



The table below describes the components of the Define Rollups page.

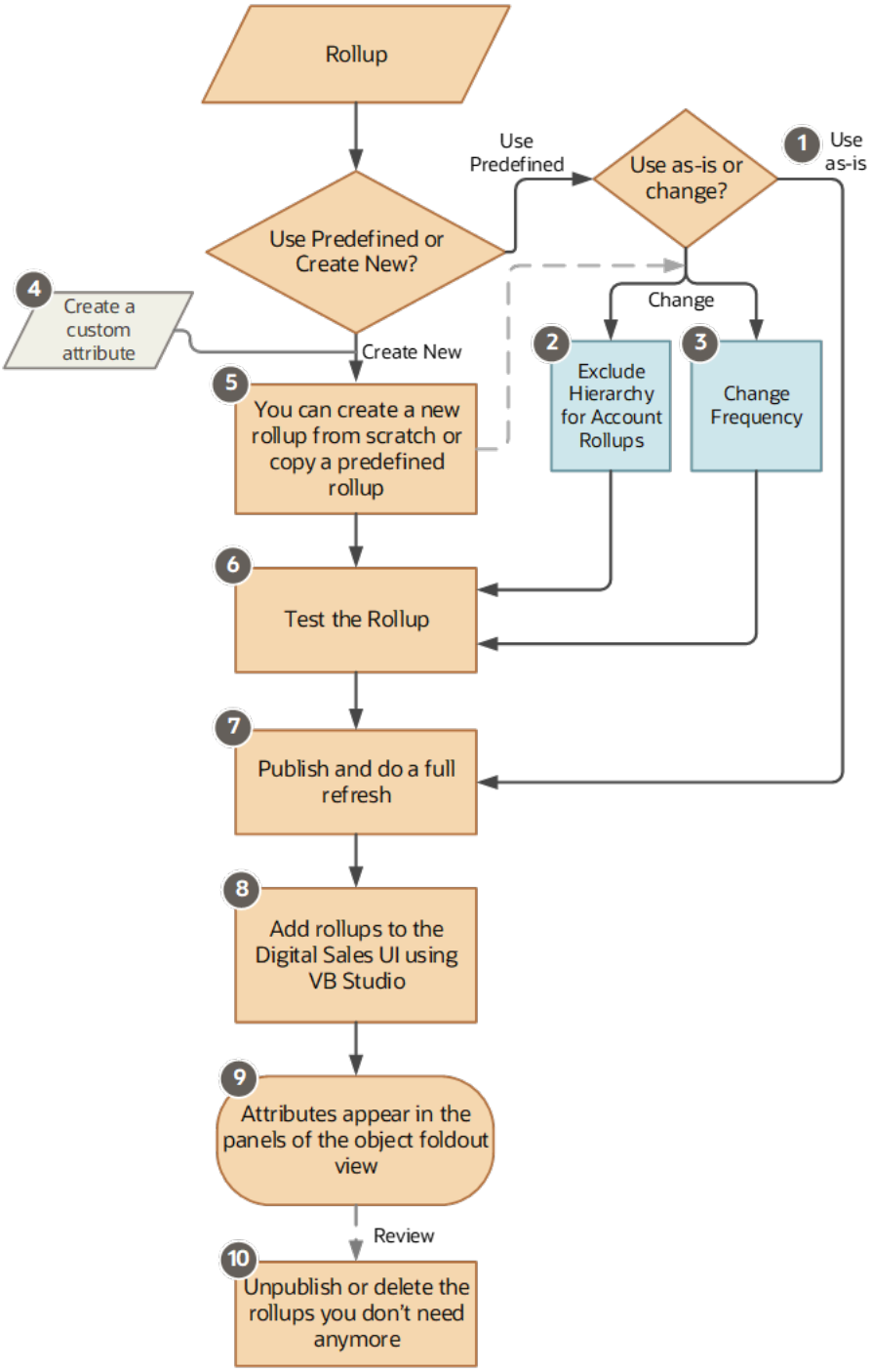
Callout	Name	Description
1	Setup	Shows the entire list of rollups. The list includes all published and unpublished rollups, both predefined and custom You can sort the columns by name, type (Regular or Aging), source object (Account), related object of the rollup, published status, and the last refresh status of the rollup.
2	Actions	• **Create**: Use this option to create a new rollup from scratch. • **Duplicate**: Use this option to create a working copy of a predefined rollup. • **Edit**: Use this option to change the parameters of a custom rollup. For predefined rollups, you can change two parameters: the hierarchy for, account rollups, and calculation frequency. • **Delete**: Use this option to delete custom rollups. You can't delete predefined rollups; you can only unpublish them.
3	Monitor	• **Full Refresh**: Run a full refresh every time you publish a rollup. • **Incremental Refresh**: Schedule an incremental refresh so that published rollups are regularly updated with the latest values. You can set this process to run once hourly. **Note:** Full refresh is used only after the rollups are published for the first time. After that, Incremental Refresh takes care of recalculating and publishing the rollups periodically.

Callout	Name	Description
		• **Hierarchy Refresh**: This process is applicable for account rollups only. Schedule or run a hierarchy refresh to recalculate account rollups if a hierarchy changes. • **Data Cleanup**: Schedule a data cleanup so that whenever you delete or unpublish a rollup, the rollup engine runs this process and clears the calculations.
4	Test	Test the unpublished rollups to ensure that they're producing correct calculations.

Work with Rollups

Here's an overview of how to work with rollups:

The graphic here gives an overall flow for rollups:



This table describes how to work with rollups and refers to the callouts in the graphic.

Things You Can Do	Description
Use the Predefined Rollups	You can use predefined rollups in three ways:

Things You Can Do	Description
	• Use them as they are (callout 1). • Tweak them slightly. • Make a working copy of them. **Note:** You can't delete a predefined rollup. **Use Them as They Are (callout 1)** Oracle provides the predefined rollups in the Define Rollups page. You can put them to immediate use just by publishing them and running a full refresh (callout 7). **Tweak Them Slightly** The parameters in the predefined rollups are read-only. You can tweak two things for a predefined rollup: • Exclude the hierarchy calculations from an account rollup (callout 2). • Change the calculation frequency (callout 3). After that, you can test your changes (callout 6), publish, and run a full refresh (callout 7) on them. **Create a Working Copy of a Predefined Rollup** You can duplicate a predefined rollup (callout 5) to get a working copy that lets you change the parameters. After modifying, test the calculations (callout 6), publish the rollup, and run a full refresh (callout 7). Ensure that you add the rollup attributes to the Digital Sales UI through Visual Basic Studio (callout 8), for the calculations to appear as metrics in Digital Sales. For more information, see the "Configure the Rollups Region in a Panel" topic in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative. A periodic incremental refresh updates the attributes in Digital Sales with the latest values.
Create a New Rollup (callout 5)	You can create an entirely new rollup (callout 5). Just be sure the rollup attribute you select is unique for each rollup. You can use a rollup attribute of an unpublished rollup or create a custom attribute (callout 4). After creating a rollup, you test the calculations (callout 6), publish the rollup, and run a full refresh (callout 7). A periodic incremental refresh updates the attributes in Digital Sales with the latest values. You need to add the rollup attribute to the Digital Sales UI through Visual Basic Studio (callout 8) for the calculations to appear as a metric in Digital Sales. For more information, see the "Configure the Rollups Region in a Panel" topic in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative. **Note:** The same as with predefined rollups, you can exclude hierarchy calculations or change the calculation frequency of new rollups.
Unpublish or Delete a Rollup	You can unpublish a predefined rollup and delete a custom rollup (callout 10). The Data Cleanup process clears all calculations and nullifies the attributes exposed in the Digital Sales UI.

Things You Can Do	Description
	Note: Unpublished rollups continue to be available on the Rollups Setup page for future use, but the deleted custom rollups can't be restored.

Predefined Rollups

Enable Predefined Rollups

Predefined rollups are the Oracle-provided rollups.

They are prebuilt using data from a source object and its related object. That data is further simplified using filter criteria, thus getting meaningful metrics your team can use.

Setting up predefined rollups is easy. You just have to:

1. Test and publish the predefined rollups.
2. Run a full refresh on them.
3. Show them on panels.
4. Enable them for Adaptive Search.
5. Enable them as Group By options.

Test and Publish Predefined Rollups

Test the rollups to ensure that they're producing the calculations you want. Here are the steps:

1. On the Define Rollups page, go to the **Test** tab.

   > **Note:** Ensure that you have enabled the **Rollup Test Enabled** (ORA_ZCA_TEST_ROLLUPS) profile option to see the Test tab on the Define Rollups page.

2. Select a rollup you want to test.
3. For **Object Instance**, select an account you want to calculate the rollup for.
4. Select the **Entire Hierarchy** check box if you have defined the hierarchy attribute for the rollup and want to include the hierarchy values, as well, in the test.
5. Click **Calculate**.
6. In the meanwhile, you can calculate the rollups manually or use this sample URL to run a REST call on the account rollup child:

   ```
   https://<hostname:port>/crmRestApi/resources/latest/accounts/<partynumber>/child/AccountRollup
   ```

7. Compare your calculations. If you're ok with the results, publish the rollup.

Publish the Rollup

After testing the rollups, publish them to the environment. Here are the steps:

1. Select an unpublished rollup.
2. On the Edit Rollup page, click **Actions** and select **Publish**.

Run a Full Refresh for Published Predefined Rollups

Run a full refresh every time you publish a rollup.

Here are the steps to run a full refresh:

1. On the Define Rollups page, go to the **Monitor** tab.
2. Select the **Full Refresh** subtab.
3. Click **Start Process**.

It's recommended that you schedule a full refresh once a day during the non-operational hours of your organization, to recalculate the aging rollups. Note that a full refresh job scheduled once a day still considers the calculation frequency set for the aging rollups before recalculating their values.

Show Predefined Rollups on Panels

You can display rollups on panels in Digital Sales work areas, such as Accounts, so that your sales team gets quick insights.

For more information, see the "Configure the Rollups Region in a Panel" topic in the Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative.

Enable Predefined Rollups for Adaptive Search

You can have your sales team use rollups to search for accounts and contacts.

See this topic to learn more:

- *Enable Searching for Accounts and Contacts Using Rollups*

Enable Predefined Rollups as Group By Options

Let your sales team group the accounts and contacts list based on rollup values.

See this topic to learn more:

- *Enable Grouping by Rollups*

Custom Rollups

Create New Rollups

Here are the steps to create a new rollup:

1. Enter basic details and define the source object.
2. Define the related object.
3. Define the hierarchy rollup to include the account hierarchy calculations in the rollup.
4. Define calculation frequency in Advanced Settings.

You do all of these tasks in Application Composer under **Advanced Setup** > **Define Rollups**.

Enter Basic Details and Define the Source Object

1. Enter **Name** and **Description** for the new rollup.
2. **Rollup Type**:
   - **Aging**: Select Aging to calculate a rollup value for a specific period. For example, you want to create a rollup for the total open activities in the last 30 days.
   - **Regular**: Select Regular if the rollup you're creating doesn't have to be time-bound.
3. **Source Object**: Select a source object. For example, Account.

   > **Note:** You can't use custom objects as source objects.

4. **Rollup Attribute**: This attribute stores the rollup value. For example, the Last Call Made and Open Opportunity Revenue attributes show the rollup values in the Accounts area of Digital Sales.

   If you're creating a custom rollup for CX Sales, you can use the formula fields to build a rollup attribute. See the *Configure Custom Rollups Using the Formula Fields* topic to learn more.
5. **Source Object Filter**: This field is enabled for source object rollups that don't need a related object, such as Total Number of Employees.

   Use this field to create rules. For example, you can create a rule to calculate the Total Number of Employees for only accounts or only prospects.

   > **Note:** Source Object Filter isn't supported if the application needs to traverse the hierarchy, because it impacts performance.

Define the Related Object

The related object fields are available for selection only when the Rollup Attribute belongs to non-account objects, such as Opportunity, Activity, or Service Request.

1. **Related Object**: This field shows the objects related to the source object. For example, if the source object is Account, its related objects, such as Contact, Activity, Interaction, Sales Lead, Opportunity, Quotes and Orders, and Service Requests, show up in the list.

   > **Note:** You can't use custom objects as related objects.

   - The **Maximum Number of Days for Data Selection** field is enabled for interaction-based rollups, such as Total Calls Made and Total Open Activities. The maximum is 120 days and this is the default value. The rollup engine uses the data from the past 120 days until today to calculate the rollup.
2. **Relationship**: Select the relationship between the source object and the related object. For example, select Account-to-Opportunity if the related object is Opportunity.
3. **Aggregate Function**: Select the function you want the rollup to perform for the related rollup attribute. The functions shown in the drop-down list depend on the Rollup Attribute you selected under Source Object. Here are the available options:
   - **Count**: Select Count if you want a total number. For example, calls made to an account or number of employees.
   - **Sum**: Select Sum if you want to get a cumulative total. For example, revenue from all the open opportunities of an account.
   - **Maximum**: Maximum is used to identify the last call made or the last email sent when you're tracking the last Creation Date for an activity. Maximum doesn't work for the number of calls made.
   - **Minimum**: Minimum is used to identify the first call made or the first email sent when you're tracking the first Creation Date for an activity.
4. **Related Attribute**: This is the attribute of the Related Object used to calculate the rollup.
   - **Example 1**: Use Creation Date from the Interactions object to calculate the date of the most recent call made to an account.
   - **Example 2**: Use Amount from the Opportunity object to calculate the Total Potential Revenue from Open Opportunities.
5. **Related Object Filter**: Use this field to create rules around the related object. For example, write a query like this to aggregate Total Potential Revenue from only qualified and unqualified open leads: `StatusCode IN ('QUALIFIED', 'UNQUALIFIED') AND DEAL AMOUNT IS NULL.`
   If you want to calculate a rollup based on the fiscal year periods of the accounting calendar for CX Sales, can use the period tokens when building the Related Object Filter criteria. See the *Use the Accounting Calendar Time Periods for Your Rollups* topic to learn more.

Include Hierarchy Changes

This section is relevant only for Account rollups.

1. **Hierarchy Rollup**: Select the check box to include hierarchies in the Account rollups.
2. **Hierarchy Rollup Attribute**: This field stores the aggregated value from the Account and its child accounts.
3. **Aggregation Function**: This field shows the same aggregate function you defined for the Related Object. You must select a value here if the rollup is a source object rollup, such as an Account rollup.

Define Advanced Settings

You define the calculation frequency of a rollup under the Advanced Settings. See the topic, *Change the Calculation Frequency of a Rollup*, to learn more.

After you're done, click **Save and Close** to save the rollup.

Test and Publish the Rollups

Test unpublished rollups to ensure that they're producing the calculations you want.

Here are the steps:

1. Go to the **Test** tab on the Rollups page.

   > **Note:** Ensure that you have enabled the **Rollup Test Enabled** (ORA_ZCA_TEST_ROLLUPS) profile option to see the Test tab on the Define Rollups page.

2. Select a rollup you want to test.
3. For **Object Instance**, select an account you want to calculate the rollup for.
4. Select the **Entire Hierarchy** check box if you have defined the hierarchy attribute for the rollup and want to include the hierarchy values, as well, in the test.
5. Click **Calculate**.
6. In the meanwhile, you can calculate manually or use this sample URL to run a REST call on an account rollup child:
   `https://<hostname:port>/crmRestApi/resources/latest/accounts/<partynumber>/child/AccountRollup.`
7. Compare your calculations. If you're ok with the results, publish the rollup.

Publish the Rollups

After testing the rollups, publish them:

1. Select an unpublished rollup.
2. On the Edit Rollup page, click **Actions** and select **Publish**.

Run a Full Refresh

Next, run a full refresh to get the latest data:

1. Go to the **Monitor** tab.
2. Select the **Full Refresh** sub-tab.
3. Click **Start Process**.

See the *Run Scheduled Processes for Rollups* topic to learn more about all the processes available for rollups.

Configure Custom Rollups Using the Formula Fields

Use the formula fields instead of a regular field to create a custom attribute for rollups. Unlike regular fields, formula fields let you build a script with rules related to calculations.

Another advantage with formula fields is that you can show multiple values on a single field, which is suitable for rollup attributes.

Below are the high-level steps for using formula fields to show custom rollups:

1. Create custom formula fields.
2. Add the formula fields to the object page.

3. Create custom rollups to populate the data of the formula fields.

Let's apply these steps and create a couple of example rollups for the Account and Contact object pages.

Example Account Rollups Created Using Formula Fields

In this example, we'll create two account rollups using formula fields, and then we'll show them on the Account Profile page. Our example rollups are:

- Total Open Opportunities
- Total Revenue from Open Opportunities of an account and the child accounts in its hierarchy

Step 1: Create Custom Formula Fields

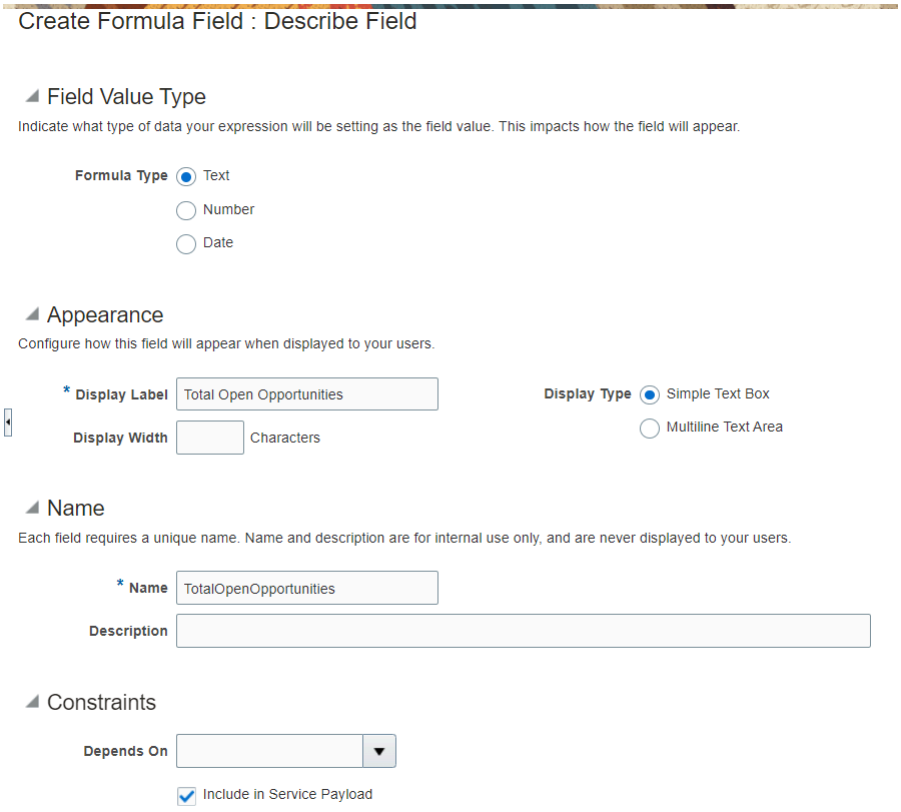
Create two new formula fields for Total Open Opportunities and Total Revenue from Open Opportunities. Here's how you do it:

1. Enter an active sandbox. From the Navigator, go to **Configuration** > **Application Composer** > **Standard Objects** > **Account** > **Fields**.
2. On the Fields page, click **Actions** > **Create**.
3. Select **Formula** and click **OK**.

   To learn more about the formula fields, read the *Formula Fields* topic in the *Configuring Applications Using Application Composer* guide.

4. Create a formula field for Total Open Opportunities:
    a. On the Create Formula Field page, enter `Total Open Opportunities` for **Display Label**, and enter the same name, but without spaces, in the **Name** field.

Here's a sample image of the Create Formula Field page:

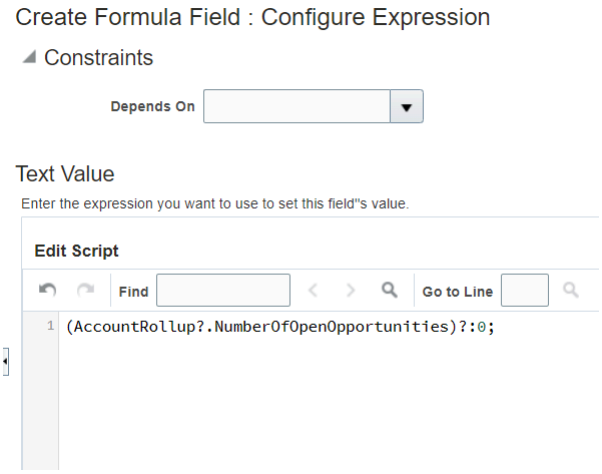


5. Click **Next**.

6. On the Configure Expression page, enter an expression the engine should consider when calculating the field value. For example, use this expression to indicate that the engine must not calculate when the number of opportunities for an account is zero:

```
(AccountRollup?.NumberOfOpenOpportunities)?:0;
```

Here's a sample image of the example expression:

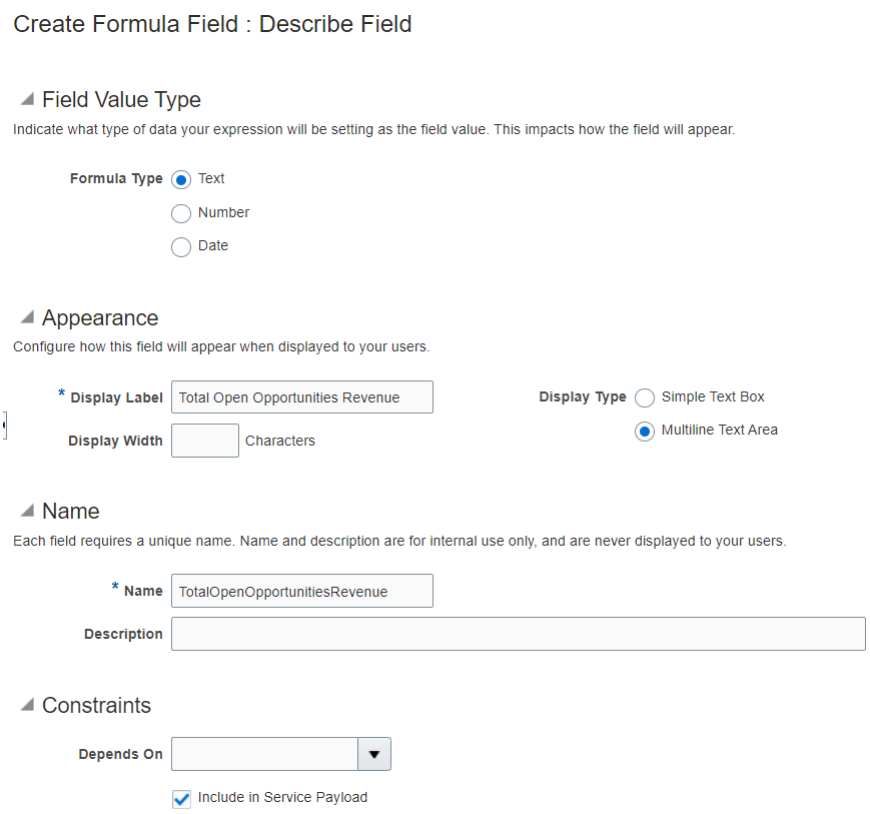


7. Click **Submit**.

8. Create a formula field for the Total Open Opportunities Revenue rollup:
    a. Follow the procedures given in steps 2 and 3.
    b. On the Create Formula Field page, enter `Total Open Opportunities Revenue` for **Display Label**, and enter the same name, without spaces, in the **Name** field.
    c. For Display Type, select **Multiline Text Area**.

    The formula field appears as a multiline text area to display two rollup fields. In this example, the two rollup fields are `SumOfOpenOpportunitiesRevenue` and `HierSumOfOpenOpportunitiesRevenue` -- one for the account and another for its hierarchy.

    Here's a sample image of the Create Formula Field: Describe Field page:



9. Click **Next**.
10. On the Configure Expression page, do this:
    a. In the expression for the formula field, create a variable to store the sum of opportunity revenues for an account. Create another variable to store the sum of opportunity revenues from an account hierarchy. In this example, the variables are `thisAccountOptyRevn` and `hierAccountOptyRevn`.
    b. Ensure that the expression evaluates whether the value of the opportunity revenue is zero. If it is zero, set the variable to null. Also, evaluate whether the value of the opportunity revenue from an account hierarchy is zero. If it's zero, don't display the account hierarchy rollup.
    c. To write the expression, select the field from the list corresponding to the Rollup object. In this case, Account Rollups is a child of Account, and it has a 1:1 relationship with the Account object. Once you select the Account Rollup, the Rollup fields appear on the list. You can reference the fields easily and insert them to the script palette to write the expression. In this case, use the fields

`AccountRollup?.SumOfOpenOpportunitiesRevenue` and `AccountRollup?.HierSumOfOpenOpportunitiesRevenue` in your expression. These are the custom rollups you created in the previous step.

11. Build an expression like the sample here:

```
def thisAccountOptyRevn = (AccountRollup?.SumOfOpenOpportunitiesRevenue)?:0;
def hierAccountOptyRevn = (AccountRollup?.HierSumOfOpenOpportunitiesRevenue)?:0;
def str = "";
if( hierAccountOptyRevn == 0 )
{
 str = sprintf("\$%,.2f",thisAccountOptyRevn);
}
else
{
 str = sprintf("For this Account: \$%,.2f\nFor the Account Hierarchy: \$%,.2f", thisAccountOptyRevn,
 hierAccountOptyRevn);
}
return str;
```

Here's a sample image of the Create Formula Field: Configure Expression page:



12. Click **Submit**.

Step 2: Add the Formula Fields to the Account Profile Page

1. Enter an active sandbox.
2. From the Navigator, go to **Configuration** > **Application Composer** > **Standard Objects** > **Account** > **Pages** > **Application Pages** > **Details Page Layouts**.
3. Create a copy of the Details Layout and add the two custom fields you created in step 1: `Total Open Opportunities` and `Hierarchy Total Open Opportunities Revenue`.
4. Save your changes.

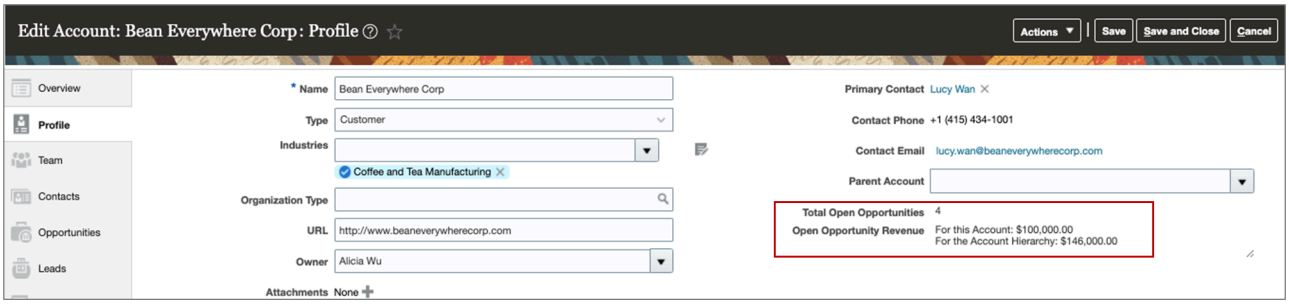
Step 3: Create Custom Rollups to Populate the Data of the Formula Fields

1. Exit the sandbox and navigate to **Application Composer** > **Define Rollups**.
2. Create rollups for Total Open Opportunities and Hierarchy Total Open Opportunity Revenue.

3. When creating the rollups, assign the formula fields you created as a Rollup Attribute and a Hierarchy Rollup Attribute, respectively.
4. Test your rollup.
5. Run a full refresh on the rollup.
6. Publish the rollup.

For detailed steps, see the *What are the steps to set up rollups?* topic.

At the end of the configuration, the two rollups you created appear on the Edit Account: Profile page. Here's a sample image:



Example Contact Rollups Created Using the Formula Fields

In this example, we will create four contact rollups using only one formula field, and then we'll show the rollups on the Contact Profile page. Our example rollups are:

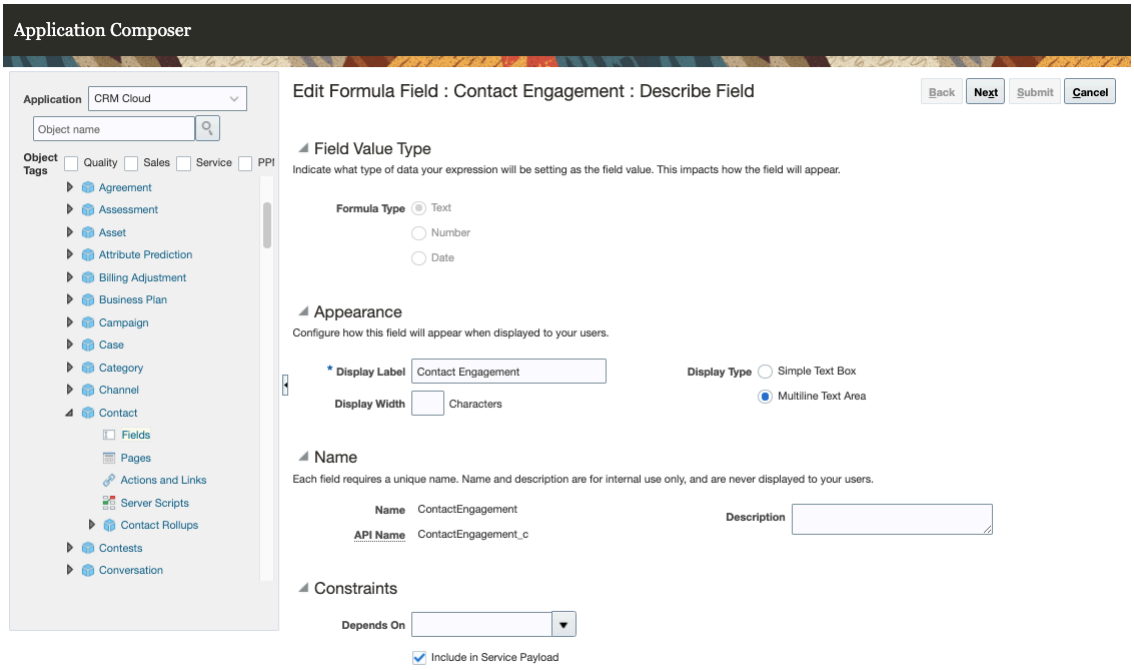
- Total Touches with a Contact
- Last Touch with a Contact
- Number of Open Service Requests Created by a Contact
- Number of Critical Open Service Requests Created by a Contact

Step 1: Create Custom Formula Fields

1. Enter an active sandbox. From the Navigator, go to **Configuration** > **Application Composer** > **Standard Objects** > **Contact** > **Fields**.
2. On the Fields page, click **Actions** > **Create**.
3. Select **Formula** and click **OK**.

   To learn more about the formula fields, read the *Formula Fields* topic in the *Configuring Applications Using Application Composer* guide.
4. On the Create Formula Field page, enter `Contact Engagement` for **Display Label**, and enter the same name, but without spaces, in the **Name** field.

5. For **Display Type**, select Multiline Text Area.



6. Click **Next**.
7. On the Configure Expression page, build an expression that can show the following attributes in a single field:
   - Number of touches.
   - The last touch with the contact.
   - The number or open service requests.
   - Critical open service requests associated with the contact.

   Touches refer to the total Emails sent, or calls made to a contact. The expression evaluates the number of open or critical service requests. You can add a string to the expression to display a friendly message if there are no SRs associated with a contact. Here's a sample expression you can build for the field:

```
Display name: Contact Engagement (Custom field: ContactEngagement_c):
/*
Total Touches with Contact:
Last touch being: ?
Note that the contact has x Service request of which x are critical
No outstanding SRs
*/
def contactLastTouchDate = ContactRollup?.LastTouchDate
def contactNumTouches = (ContactRollup?.NumberOfTouches)?:0;
def contactCriticalSrs = (ContactRollup?.NumberOfOpenCriticalServiceRequests)?:0;
def contactSrs = (ContactRollup?.NumberOfOpenServiceRequests)?: 0;
def str = "";
if( contactNumTouches > (BigDecimal)0 )
 str = "Total touches with contact: " + contactNumTouches + "\n";
if( contactLastTouchDate )
 str = str + "Last touch being: " + contactLastTouchDate.format("M/d/yyyy") + "\n";
if( contactSrs )
{
 str = str + "This contact has " + contactSrs + " open service request";
```

```
 if( contactSrs > (BigDecimal) 1 ) // plural for service request?
 str = str+ "s";
 if( contactCriticalSrs )
 {
 str = str + ", " +contactCriticalSrs+ " critical!";
 }
}
else
{
 str = str + "There are no outstanding Service Requests for this contact";
}
return str;
```

8. Click **Submit**.

Step 2: Add the Formula Field to the Contact Profile Page

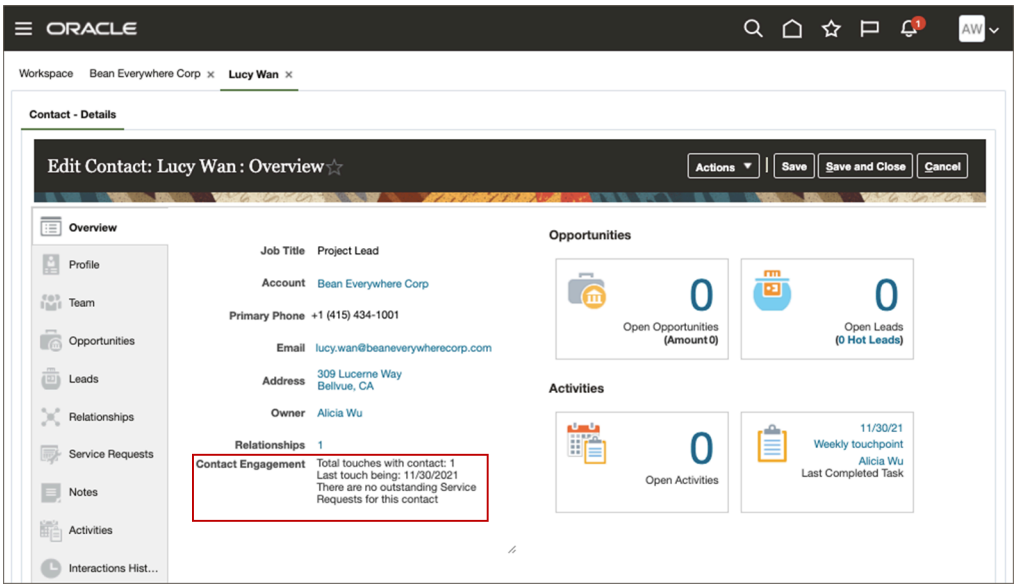
1. Enter an active sandbox. From the navigator, go to **Configuration** > **Application Composer** > **Standard Objects** > **Contact** > **Pages** > **Application Pages** > **Details Page Layouts**.
2. Create a copy of the Details layout and add the **Customer Engagement** field you created in the step 1.
3. Save your changes.

Step 3: Create a Custom Rollup to Populate the Data of the Formula Field

1. Come out of the sandbox and navigate to **Application Composer** > **Define Rollups**.
2. Create a custom rollup and assign the Contact Engagement formula field as a rollup attribute.
3. Test your rollup.
4. Run a full refresh on the rollup.
5. Publish the rollup.

For detailed steps, see the *What are the steps to set up rollups?* topic.

At the end of the configuration, you can see the rollup showing all four attributes in a single field on the Edit Contact: Profile page. Here's a sample image:

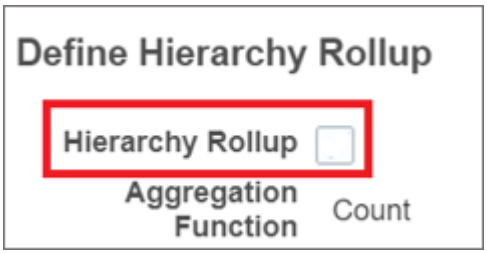


Additional Configurations

Exclude Hierarchy for the Account Rollups

Here's how to exclude the hierarchy from an account rollup calculation:

1. Select an account rollup.
2. Scroll down to the **Define Hierarchy Rollup** section.
3. Deselect the **Hierarchy Rollup** check box.



4. Click **Save and Close**.
   The rollup engine excludes the hierarchy from the rollup calculations in its next run.

Change the Calculation Frequency of a Rollup

Calculation frequency indicates how often the rollup engine should recalculate the rollup values. By default, the frequency for Aging rollups is once a day, and for Regular rollups, it's once an hour.

Here's how you change the frequency:

1. Open a rollup.
2. Under **Advanced Settings** in the edit page, change the **Calculation Frequency** of the rollup.
3. **Maximum Number of Days for Data Selection**: This field appears only for Interaction and Activity-based aging rollups, such as Total Calls Made and Total Open Activities. The maximum is 120 days, and this is the default value. The rollup engine uses the data from the past 120 days until today to calculate the rollup.

   > **Note:** Ensure that the number of days is within 120 to avoid performance slowdown during a full refresh.

4. Click **Save and Close**.
   The rollup engine uses the new frequency in its next run.

Refer to *Create Rollups* to learn more about Aging and Regular rollups.

Run Scheduled Processes for Rollups

The Monitor tab on the Define Rollups page contains these scheduled processes that you can run for rollups:

- Rollup Full Refresh

- Rollup Account Hierarchy and Linked Records Refresh
- Rollup Incremental Refresh
- Data Cleanup

Full Refresh Process

Run a full refresh every time you publish a rollup. Here are the steps to trigger a full refresh:

1. Publish a rollup.
2. Go to **Monitor** > **Full Refresh**.
3. Click **Start Process** to run the **Rollup Full Refresh** scheduled process.

   After the full refresh completes, your users can see the rollup value as a metric in the Digital Sales UI.

   Also, it's recommended that you schedule a full refresh once in a day during the non-operational hours of your organization.

   > **Note:** The full refresh job, when scheduled once a day, considers the calculation frequency set for aging rollups before recalculating their values.

Enforce Recalculation

A full refresh doesn't run any previously published rollups. This is because the volume of records that the rollup engine has to process is too high, affecting the performance. If you want to recalculate a previously published rollup, use the **Enforce Recalculation** option to include it in the full refresh.

Here's how you can use the Enforce Recalculation option:

1. Open a previously published rollup.
2. On the Edit Rollups page, click **Actions** and select **Enforce Recalculation**.
3. Go to **Monitor** > **Full Refresh**.
4. Click **Start Process**.

   After the full refresh completes, your users can see the latest rollup value in the Digital Sales UI.

Incremental Refresh Process

The **Rollup Incremental Refresh** scheduled process runs automatically at scheduled intervals to update published rollups with the latest calculations. This process is necessary because changes made to contacts, opportunities, leads, activities, or other related objects, affect the rollup values. The Rollup Incremental Refresh scheduled process is based on the Calculation Frequency set for the rollups.

> **Note:** Set the frequency to schedule the Rollup Incremental Refresh process. On the Monitor tab, you can see the status of the process, but you can't run it manually.

Rollup Account Hierarchy and Linked Records Refresh

The Rollup Account Hierarchy and Linked Records Refresh is only for accounts.

The rollup engine doesn't register changes you make to the account hierarchy. So, run the Hierarchy Refresh process whenever you change or delete an account node. The recommended frequency is to run this job every 24 hours.

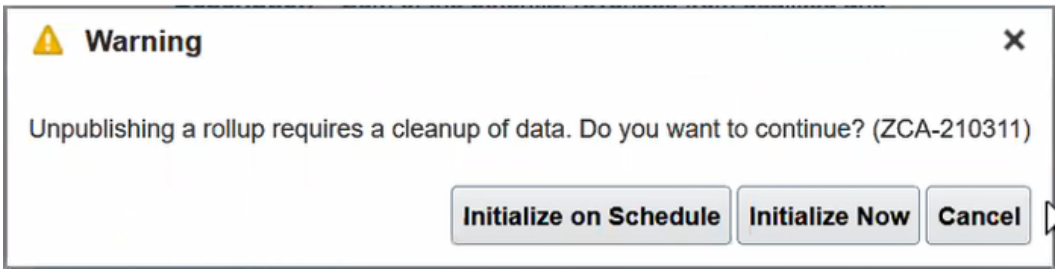
1. Go to the **Monitor** > **Hierarchy Refresh**.
2. Click **Start Process** to run the **Rollup Account Hierarchy and Linked Records Refresh** scheduled process.

> **Note:** Instead of running the Rollup Account Hierarchy and Linked Records Refresh process manually every time, you can schedule a daily refresh.

Data Cleanup Process

When you unpublish or delete a rollup, the application prompts you to clear up the data.

- Select **Initialize on Schedule** to let the **Data Cleanup** scheduled process clear the data.
- Select **Initialize Now** to initiate the data cleanup immediately.



Rollup and Adaptive Search Scheduled Process Considerations

You must run a rollup Full Refresh each time there's a change to a rollup configuration. A change to the configuration results whenever a rollup object is created, deleted, published, or unpublished. Once the full refresh process is completed for the rollup, run the Adaptive Search Partial Publish indexing process to publish only those objects that have changed their configuration.

For example, if you create a rollup called `Num of Open Opty` to calculate the number of open opportunities for the Account object, then after running a **Full Refresh**, you perform the one time activity of running an Adaptive Search **Partial Publish** for the Account object as follows:

1. Run the Partial Process from the **Actions** menu in the Advanced tab of the **Configure Adaptive Search** setup task.
2. Once the `Num of Open Opty` rollup is available in your Workspace for Account, run the **Rollup Incremental Refresh** scheduled process job to create an indexing request after an hour (default configuration) and the subsequent Adaptive Search **Periodic Refresh** will index the new rollup.

   > **Note:** This is applicable only for regular (non aging) rollups. The **Rollup Incremental Refresh** scheduled process runs automatically at scheduled intervals to update published rollups with the latest calculations.

3. You can schedule a Full Refresh for any existing aging rollups that are available in Workspace. The recommended schedule for the rollup **Full Refresh** is once a day but you can schedule it to run more frequently depending on your requirements.

   The Adaptive Search **Periodic Refresh** scheduled process must be completed before the latest rollup data will be available in Workspace. The Periodic Refresh process enables you to search for imported records or records updated by background processes and will be available for search after the indexing process completes.

   > **Note:** This is applicable only for aging rollups.

4. You can choose to recalculate a previously published rollup by selecting the **Enforce Recalculation** option to include it in the full refresh of the rollup. So, at any point, if your rollup data is available in Workspace and you

select the Enforce Recalculation option, the subsequent Adaptive Search **Periodic Refresh** will sync the latest data in Workspace.

Use the Accounting Calendar Time Periods for Your Rollups

When creating rollups that depend on fiscal year periods, such as current quarter, use the accounting calendar periods. The accounting calendar defines the fiscal year and the time periods within it.

Therefore, the periods that are set based on the accounting calendar are useful when calculating rollups like Revenue from the last fiscal quarter.

In the sales application, predefined period tokens are available that are created based on the accounting calendar time periods.

Accounting Calendar Period Tokens for Rollups

This table lists the period tokens based on the accounting calendar. You use the tokens given in the Token column to define the periods for your rollups.

> **Note:** Ensure that your accounting calendar supports weekly periods before using the week-related tokens for rollups. The week-related tokens are: GL_WTD, GL_PWTD, and GL_PW.

Accounting Calendar Period Tokens

#	Token	Meaning	Attribute	Description
1	GL_WTD	Week-to-date	glweekToDate()	The period from the beginning of the current week until today. For example, the current date is Thursday, March 10, and the first day of the week is set in the accounting calendar as Monday. The week-to-date period will be from Monday, March 7, to Thursday, March 10.
2	GL_MTD	Month-to-date	glmonthToDate()	The period from the first day of the current month until today. For example, the current date is March 10. The month-to-date period will be March 1 to 10.
3	GL_QTD	Quarter-to-date	glquarterToDate()	The period from the first day of the current quarter until today. For example, if the first day of the current quarter is January 1 and the current date is March 10, the quarter-to-date period will be January 1 to March 10.
4	GL_YTD	Year-to-date	glyearToDate()	The period from the first day of the current fiscal year until today. For example, if the first day of your current fiscal year is January 1, the year-to-date period will be January 1 to March 10.
5	GL_PWTD	Previous Week-to-date	glpreviousWeekToDate()	The period from the first day of the previous week until today. For example, if the week begins on Monday, the previous week-to-date period will be from Monday of the last week until today.
6	GL_PMTD	Previous Month-to-date	glpreviousMonthToDate()	The period from the first day of the previous month until today. For example, if the current date is March 10, the previous month-to-date period will be February 1 to March 10.
7	GL_PQTD	Previous Quarter-to-date	glpreviousQuarterToDate()	The period from the first day of the previous quarter until today. For example, if the first day of the previous quarter was October 1, 2021, and the current date is March 10, 2022, the previous

#	Token	Meaning	Attribute	Description
				quarter-to-date period will be October 1, 2021, of the previous year, to March 10, 2022.
8	GL_PYTD	Previous Year-to-date	glpreviousYearToDate()	The period from the first day of the previous fiscal year until today. For example, if the first day of your previous fiscal year was January 1, 2021, the year-to-date period will be January 1, 2021, to March 10, 2022.
9	GL_PW	Previous Week	glpreviousWeek()	The period from the first day of the previous week until the end of the week.
10	GL_PM	Previous Month	glpreviousMonth()	The period from the first day of the previous month until the end of the month.
11	GL_PQ	Previous Quarter	glpreviousQuarter()	The period from the first day of the previous quarter until the end of the quarter.
12	GL_PY	Previous Year	glpreviousYear()	The period from the first day of the previous fiscal year until the end of the fiscal year.

How to Use an Accounting Calendar Token in a Rollup

When creating a rollup, you write a query into the Related Object Filter field, defining all the conditions that a rollup needs to consider while calculating the aggregated value. For example, you want to create a rollup that calculates revenue from qualified and unqualified leads. In this case, your Source Object is Account, the Related Object is Lead, and the Related Object Filter query is:

```
StatusCode IN ('QUALIFIED', 'UNQUALIFIED') AND DEAL AMOUNT IS NOT NULL
```

This query adds up the revenue or deal amount associated with the qualified and unqualified leads and shows the aggregated value for the rollup.

Now, let's say you want to calculate the revenue from the previous quarter of the accounting calendar. You need to add the period token, GL_PQ, to the query, as shown below:

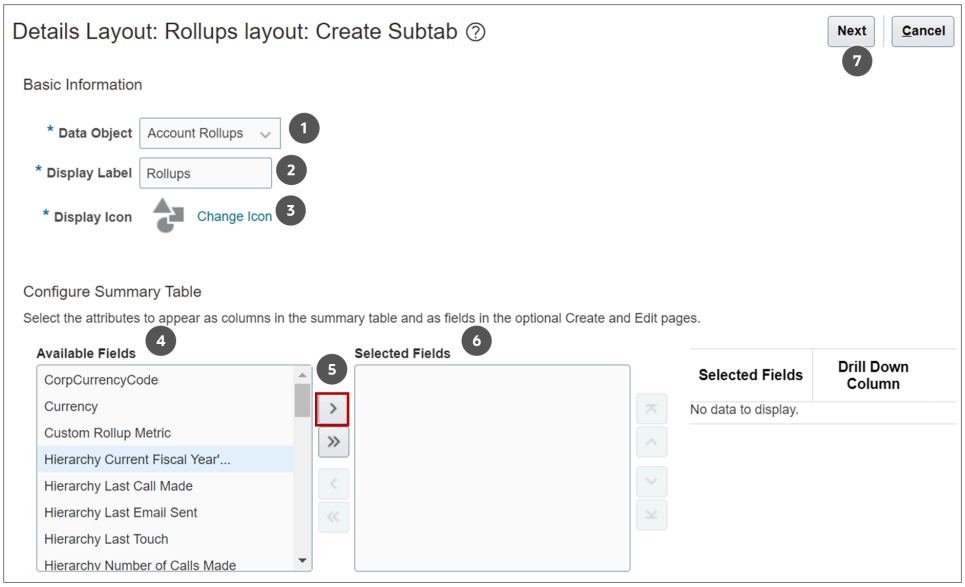
```
StatusCode IN ('QUALIFIED', 'UNQUALIFIED') AND DEAL AMOUNT IS NOT NULL AND LastAssignmentDate=:GL_PQ
```

Show Rollups

Show Rollup Attributes on the Object Pages

To show the rollup attributes on the object pages of the sales application, you need to create a custom subtab of type, child object.

To learn more about subtabs, see the information on custom subtabs in the *Configuring Applications Using the Application Composer* guide.



In the Create Subtab layout, do this:

1. Select the **Data Object** (callout 1). For example, select `Account Rollups` if you're adding a Rollups subtab for the Account object.
    - The Data Object name you selected is copied into the Display Label field (callout 2). You can change the label. A display icon (callout 3) is auto-assigned to the subtab. You can change the icon, too.
    - Based on the data object you selected, the **Available Fields** area (callout 4) in the Configure Summary Table region shows the rollups relevant for that object. For example, if your data object is Account Rollups, the Available Fields shows the entire list of account rollups.
2. From the Available Fields area (callout 4), select the rollups you want to add to the subtab and click the right-arrow (callout 5) to move them to the Selected Fields area (callout 6).
3. Click **Next** (callout 7).
4. Click **Save and Close**.
   The Rollups subtab displays on the object details page.

Search Using Rollups

Enable Searching for Accounts and Contacts Using Rollups

Enable rollups for Adaptive Search to let your salespeople search accounts and contacts using rollups in Digital Sales.

1. In the Setup and Maintenance work area, use the **Configure Adaptive Search** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, click **Setup** in the left navigation pane and click the **Advanced** tab.
3. Under Advanced, expand **Account** > **Account Rollup**, and select **Account Rollup**.
   You can see all the account and hierarchy rollups.

- Select the **Enable** check box for the account and hierarchy rollups you want to use as the search criteria and save.

4. To enable the contact rollups, expand **Contact** > **Contact Rollup** and select **Contact Rollup**.
   - Select the **Enable** check box for the contact rollups you want to use as the search criteria and save.
5. Click **Actions** and select **Partial Publish**.
   a. On the Partial Publish window, select **Account** and **Contact**.
   b. Click **Proceed with Partial Publish**.

      On the Partial Publish window, the Account and Contact objects are shown as selected under the Existing objects to republish header.
   c. Click **Publish**.

      The publishing process begins. To monitor the progress, go to **Monitor** > **Publish**.
6. Next, go to **Configure UI**.
7. On the Configure UI page, select **Display in UI** for the rollups you just enabled and save your changes.
8. Next, publish the objects again.
   a. Click **Actions** and select **Partial Publish**.
   b. On the Partial Publish window, select **Account** and **Contact**.
   c. Click **Proceed with Partial Publish**.

      On the Partial Publish window, the Account and Contact objects are shown as selected under the Existing objects to republish header.
   d. Click **Publish**.

      The publishing process begins. To monitor the progress, go to **Monitor** > **Publish**.

Your sales team can use the rollups you enabled as search criteria in accounts and contacts.

Scenarios When Enabling Rollups for Adaptive Search

You may need to consider the scenarios shown in the table and then take required action before and after enabling your rollups for Adaptive Search.

Scenario#	Scenario	Required Action
1	You want to publish a rollup that uses existing attributes.	1. If it's a custom rollup, create the rollup. If it's a predefined rollup, review the settings before publishing. 2. Publish the rollup. 3. Run a full refresh on your published rollup. 4. Enable the rollup attribute for Adaptive Search. 5. Select the object and publish it.
2	You want to create a new rollup that uses custom attributes.	1. Add the custom attribute to Application Composer and publish the sandbox. 2. Create the rollup and publish it. 3. Run a full refresh on your published rollup. 4. Enable the rollup attribute for Adaptive Search. 5. Select the object and publish it.
3	• You have rollups of type, Aging, that are already published.	1. Skip the rollups publish and enable the rollup attribute for Adaptive Search directly. 2. Select the object and publish it.

Scenario#	Scenario	Required Action
	• You have done a mass recalculation on all the published rollups.	

Related Topics

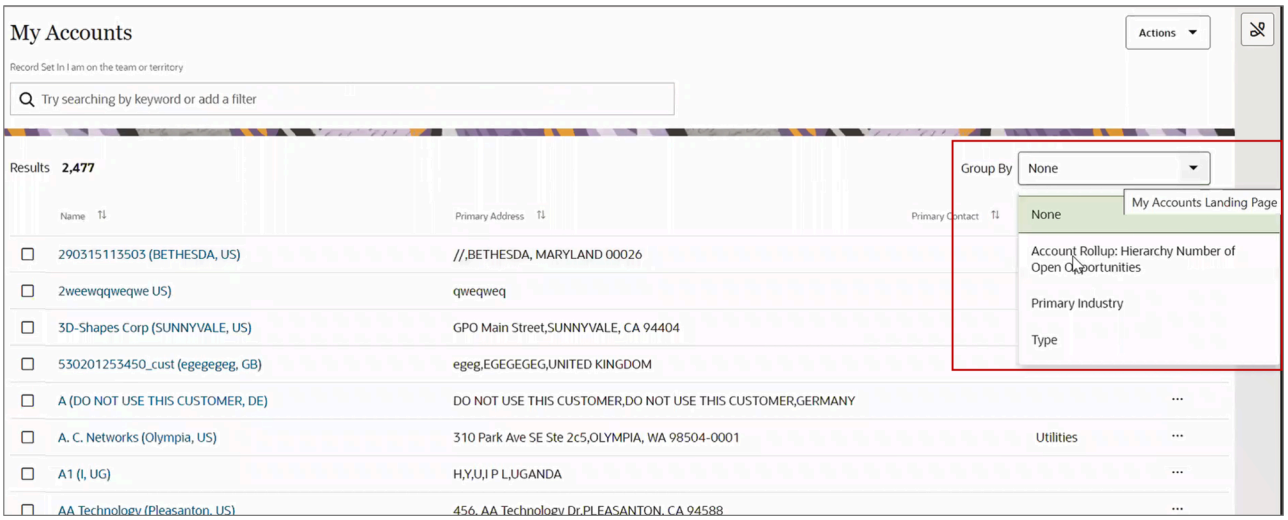
- Search Using Hierarchy Rollups
- Search for Contacts Using Rollups

Enable Grouping by Rollups

Let your salespeople use rollups as criteria to group accounts and contacts.

When you enable rollups to be the group by criteria, they appear in the Group By drop-down list in the Accounts or Contacts list view pages.

The screenshot below highlights a rollup appearing as a Group By option:



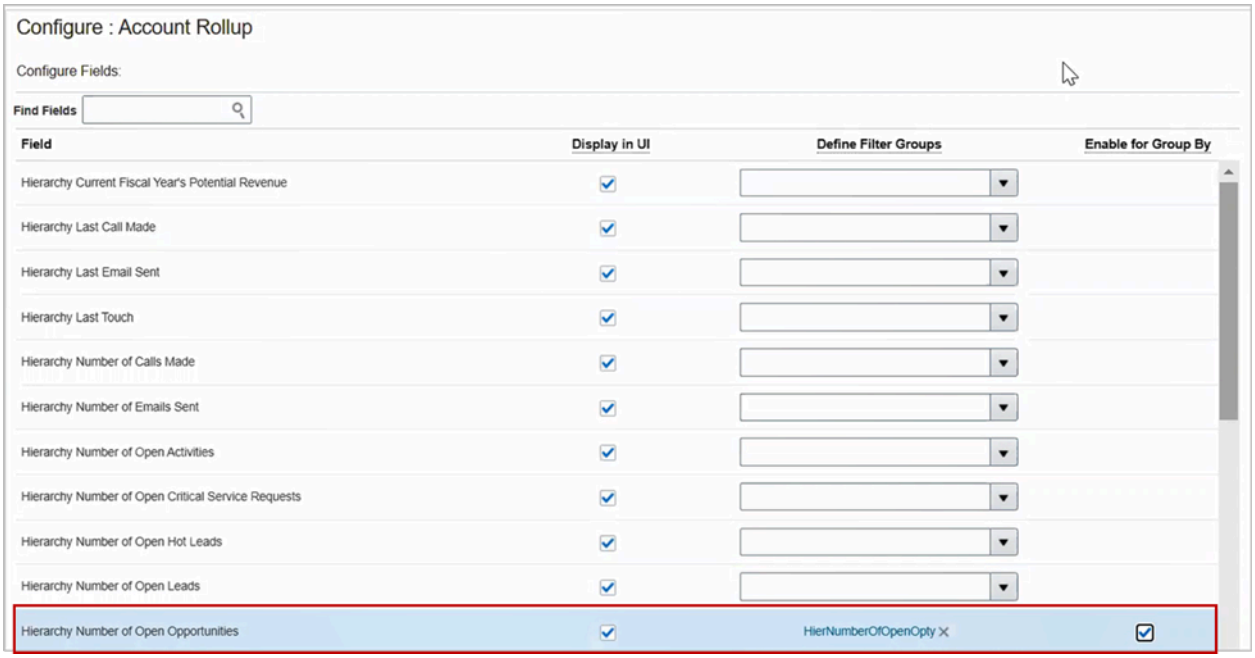
Here's how you configure rollups as the Group By criteria:

1. In the Setup and Maintenance work area, use the **Configure Adaptive Search** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, click **Setup** in the navigation pane and click the **Advanced** tab.
3. In Advanced, expand **Account** > **Account Rollup** and select **Account Rollup**.

    You can see all the account and hierarchy rollups.

    - Select the **Enable** checkbox for the account and hierarchy rollups and save.

4. To enable the contact rollups, expand **Contact** > **Contact Rollup** and select **Contact Rollup**.
    - Select the **Enable** checkbox for the contact rollups you want to use as the search criteria and save.
5. Click **Actions** and select **Partial Publish**.
    a. On the Partial Publish window, select **Account** and **Contact**.
    b. Click **Proceed with Partial Publish**.
    On the Partial Publish window, the Account and Contact objects are shown as selected in the Existing objects to republish header.
    c. Click **Publish**.
    The publishing process begins. To monitor the progress, go to **Monitor** > **Publish**.
6. Next, click **Configure UI** in the navigation pane.
7. Expand **Account** > **Account Rollups**.
    a. Search for the rollups you want to enable as the Group By criteria.
    b. Select **Display in UI**.
    c. Assign a filter group for the rollup.
    To learn more about the filter groups, see the *Create Groupings of Values for Display in Search Filters* topic in *Advanced Setup in the Adaptive Search and Workspace* chapter of the *Implementation Reference* guide.
    The **Enable for Group By** checkbox is enabled only after you assign the filter group.
    d. Select the **Enable for Group By** checkbox. Here's a screenshot of the Configure page that highlights enabling the group by option for a sample account rollup:



    e. Click **Save**.
8. Next, go to **Contacts** > **Contact Rollups** from Configure UI.
    a. Search for the rollups you want to enable as the Group By criteria.

b. Select **Display in UI**.
c. Assign a filter group for the rollup.

   To learn more about the filter groups, see the *Create Groupings of Values for Display in Search Filters* topic in *Advanced Setup in the Adaptive Search and Workspace* chapter of the *Implementation Reference* guide.

   The **Enable for Group By** checkbox is enabled only after you assign the filter group.
d. Select the **Enable for Group By** checkbox.
e. Click **Save and Close**.

9. Next, publish the objects.
   a. Click **Actions** and select **Partial Publish**.
   b. On the Partial Publish window, select **Account** and **Contact**.
   c. Click **Proceed with Partial Publish**.

      On the Partial Publish window, the Account and Contact objects are shown as selected in the Existing objects to republish header.
   d. Click **Publish**.

      The publishing process begins. To monitor the progress, go to **Monitor** > **Publish**.

   The Account and Contact rollups you enabled appear in the Group By drop-down list.

Related Topics

- Group Your Accounts and Contacts List by Rollup Values

Remove Rollups

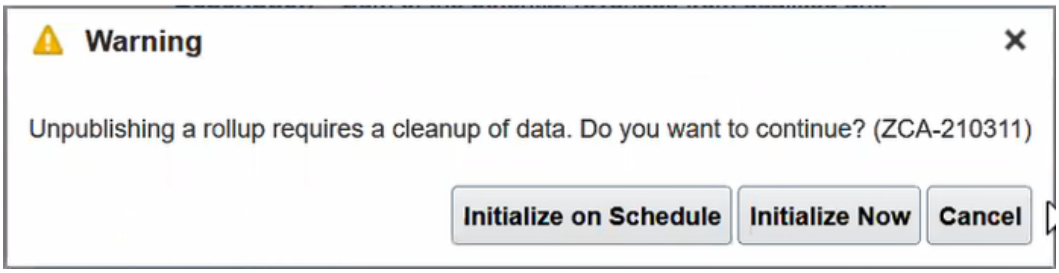
Unpublish a Predefined Rollup

Here are the steps to unpublish a predefined rollup:

1. Select the predefined rollup that you want to unpublish.

2. On the Edit Rollup page, click **Actions** and select **Unpublish**.

   A warning message appears showing two options: **Initialize on Schedule** or **Initialize Now**:



   - **Initialize on Schedule**: Select this option to clean up the data whenever the next scheduled Data Cleanup process for initialization runs.
   - **Initialize Now**: Select this option to trigger the Data Cleanup scheduled process immediately.

   The data calculated for the rollups is deleted, and the corresponding attributes in the Digital Sales UI are nullified and automatically hidden from the UI. The unpublished rollups are still available on the Rollups Setup page for future use.

Delete a Custom Rollup

Here are the steps to delete a custom rollup:

Note: You can't restore custom rollups after you delete them.

1. Select the custom rollup that you want to delete.
2. On the Edit Rollup page, click **Actions**, and then select **Unpublish**.

   A warning message appears showing two options: **Initialize on Schedule** or **Initialize Now**:

   - **Initialize on Schedule**: Select this option to trigger a data cleanup whenever a scheduled Data Cleanup process runs.
   - **Initialize Now**: Select this option to trigger the data cleanup immediately.

   The data calculated for the rollups is deleted and the corresponding attributes in the Digital Sales UI are nullified and automatically hidden from the UI. Remove the rollup attribute from the Digital Sales UI and also from Adaptive Search so that it's not available in search any more.

Remove a Rollup from Adaptive Search

To remove a rollup from being a search criterion in Digital Sales, you must remove the rollup attribute from Adaptive Search.

This table covers the scenarios and the course of action you must take for removing the rollups as search options:

Scenario#	Scenario	Required Action
1	You want to unpublish or delete a rollup and abandon the corresponding rollup attribute.	1. Unpublish or delete the rollup. 2. Run a data cleanup job or wait for a scheduled full refresh job to complete. 3. Follow the steps given in the *Remove a Rollup from Adaptive Search* topic to enable the rollup attribute for Adaptive Search. 4. Select the object and publish it.
2	You want to change the attribute in a published rollup and abandon the previously used rollup attribute.	1. Edit the rollup and change the attribute you used. Save your changes. 2. Publish the rollup and run a full refresh. 3. If it's a custom attribute, remove the attribute from the object in Application Composer and publish the sandbox. 4. Follow the steps given in the *Remove a Rollup from Adaptive Search* topic to enable the rollup attribute for Adaptive Search. 5. Select the object and publish it.

Here's how you remove the rollup attributes from Adaptive Search:

1. In the Setup and Maintenance work area, use the **Configure Adaptive Search** task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Configure Adaptive Search
2. On the Configure Adaptive Search page, click **Setup** in the left navigation pane and click the **Advanced** tab.
3. Under Advanced, expand **Account** > **Account Rollup** and select **Account Rollup**.

    You can see all the account and hierarchy rollups.

    - Unselect the **Enable** check box for the account and hierarchy rollups you want to disable and save.
4. To disable contact rollups, expand **Contact** > **Contact Rollup** and select **Contact Rollup**.
    - Unselect the **Enable** check box for the contact rollups you want to disable and save.
5. Click **Actions** and select **Partial Publish**.
    a. On the Partial Publish window, select **Account** and **Contact**.
    b. Click **Proceed with Partial Publish**.

    On the Partial Publish window, the Account and Contact objects are shown as selected under the Existing objects to republish header.
    c. Click **Publish**.

    The publishing process begins. To monitor the progress, go to **Monitor** > **Publish**.
6. Next, go to **Configure UI**.
7. On the configure UI page, unselect **Display in UI** for the rollups you just enabled and save your changes.
8. Next, publish the objects again.
    a. Click **Actions** and select **Partial Publish**.
    b. On the Partial Publish window, select **Account** and **Contact**.
    c. Click **Proceed with Partial Publish**.

    On the Partial Publish window, the Account and Contact objects are shown as selected under the Existing objects to republish header.
    d. Click **Publish**.

    The publishing process begins. To monitor the progress, go to **Monitor** > **Publish**.

Rollups are disabled from Adaptive Search.

38 Routines

Overview of Routines

Routines are a programmed set of actions that let sales administrators automate data hygiene and process compliance tasks to ensure teams have accurate and current data.

For example, to reduce risk and enforce data integrity, you can create routines to update fields, send email notifications, and create tasks based on rules. Routines can help salespeople be more efficient and productive.

Let's say you want to retire aging leads or close tasks open for more than 90 days. You create a routine to retrieve and filter records meeting specified rules, and, upon a trigger, perform actions within the context of those records. Routines are scheduled to run at certain predefined intervals, and the associated rule conditions can also be based on specific time intervals.

The key components of a routine are:

- Trigger

  A trigger is something that starts the routine run process. It's based on a schedule event, such as daily, weekly, monthly, or yearly, and in some cases, a routine run process can be triggered on an event.

  > **Note:** Redwood User Experience (UX) users will have access to additional triggers to specify when the routine runs. For example, in addition to the defined recurring schedules, they can choose to run the routine as soon as an attribute is changed or when a record is created, updated, or deleted.

- Rule

  A rule contains a set of conditions that a record must meet before an action can be performed.

- Action

  An action is a business task performed on records that meet the rule conditions.

Take this example of a schedule-driven routine:

```
Every day, update all leads older than 30 days to inactive
```

In this scenario, Every day is the **trigger**, older than 30 days is the **rule**, and update lead to inactive is the **action**.

How do I access the Routines dashboard?

Sales administrators and users with the appropriate access privileges can view and create routines from the routines dashboard. Other sales users can get access to configure and manage routines based on granting the appropriate functional privilege to their roles.

Before you start

To use routines, you must have access to Application Composer and must have the Manage Routines privilege (ZCA_MANAGE_ROUTINES). This privilege is available to the following roles by default:

- Application Implementation Consultant
- Sales Administrator
- Customer Relationship Management Application Administrator

Note: If you're working with custom objects, you will also require the ORA_CRM_EXTN_ROLE role.

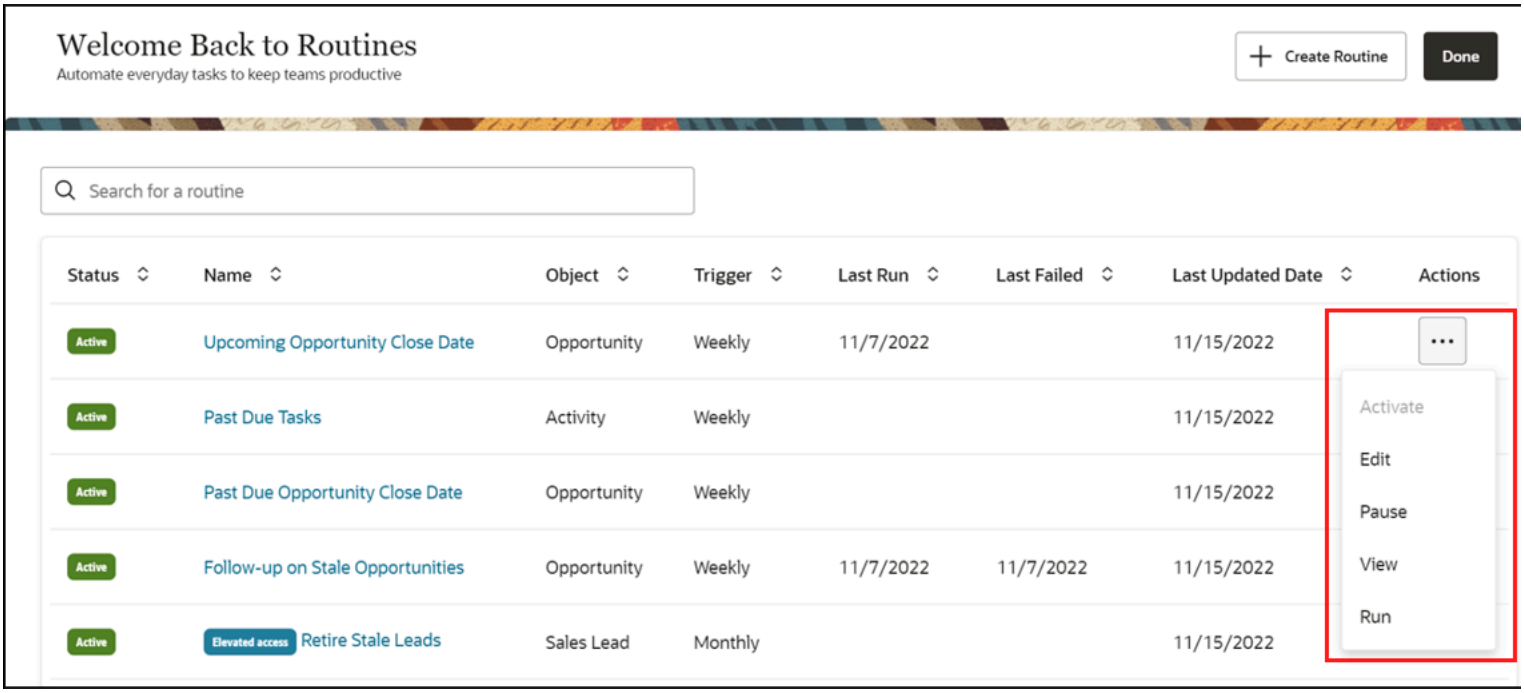
Here's how to access the routines dashboard:

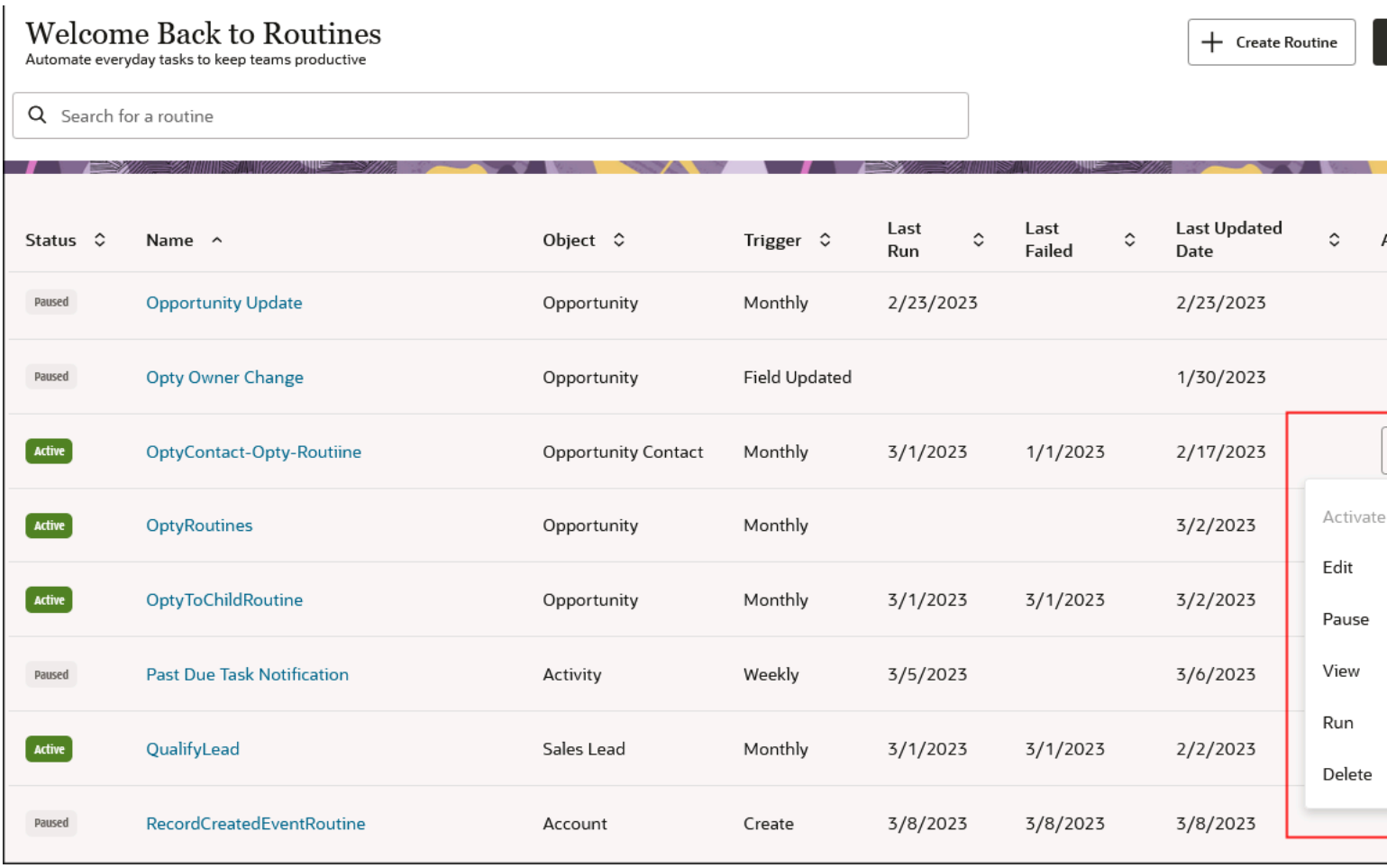
1. Open Application Composer by selecting **Configuration** > **Application Composer** in the Navigator menu.
2. Under the Common Setup Menu, click **Routines** to open the Routines dashboard.

Overview of Routines Dashboard

If you have access to Application Composer and have the Manage Routines privilege, then you can run and view all routines created for your organization from the routines dashboard.

Here's an example of some routines created by administrators from the Routines dashboard:


Welcome Back to Routines
Automate everyday tasks to keep teams productive
Create Routine
Done
Search for a routine
Status
Name
Object
Trigger
Last Run
Last Failed
Last Updated Date
Actions
Active
Upcoming Opportunity Close Date
Opportunity
Weekly
11/7/2022
11/15/2022
Past Due Tasks
Activity
Weekly
11/15/2022
Past Due Opportunity Close Date
Opportunity
Weekly
11/15/2022
Follow-up on Stale Opportunities
Opportunity
Weekly
11/7/2022
11/7/2022
11/15/2022
Elevated access
Retire Stale Leads
Sales Lead
Monthly
11/15/2022
Activate
Edit
Pause
View
Run


Welcome Back to Routines
Automate everyday tasks to keep teams productive
Create Routine
Search for a routine
Status
Name
Object
Trigger
Last Run
Last Failed
Last Updated Date
Paused
Opportunity Update
Opportunity
Monthly
2/23/2023
2/23/2023
Paused
Opty Owner Change
Opportunity
Field Updated
1/30/2023
Active
OptyContact-Opty-Routiine
Opportunity Contact
Monthly
3/1/2023
1/1/2023
2/17/2023
Active
OptyRoutines
Opportunity
Monthly
3/2/2023
Active
OptyToChildRoutine
Opportunity
Monthly
3/1/2023
3/1/2023
3/2/2023
Paused
Past Due Task Notification
Activity
Weekly
3/5/2023
3/6/2023
Active
QualifyLead
Sales Lead
Monthly
3/1/2023
3/1/2023
2/2/2023
Paused
RecordCreatedEventRoutine
Account
Create
3/8/2023
3/8/2023
3/8/2023
Activate
Edit
Pause
View
Run
Delete

From the Routines dashboard, you can run a routine on demand. This means that you run a routine immediately if you want to view the results or to re-run a routine after correcting errors.

Routines that are scheduled to run across all data for an object are denoted by the **Elevated access** badge. The badge is displayed for those routines that have the **Schedule routine with elevated access** check box selected during the creation of the routine.

> **Note:** The check box is only available to users who are assigned the ZCA_SCHEDULE_ROUTINE_APPID privilege to their role. If you are working with custom objects, you will also require the ORA_CRM_EXTN_ROLE role.

If you're using Redwood UX, you can react in real time when a record is created, updated or deleted by triggering a routine to run immediately. Event triggers inform stakeholders of key changes so they can respond in a relevant time period. For example, event routines can create tasks, update fields and notify members of critical changes when the owner is changed on a lead, opportunity or task.

> **Note:** The option to Schedule Routine with Elevated Access is removed because event routines are run for all records meeting the routine trigger and rules.

Delete is also available as a quick action to delete routines that are no longer needed. When a routine is deleted, the routine definition and history are permanently deleted.

You can also activate and pause routines and view a summary of the routines. For example, you can:

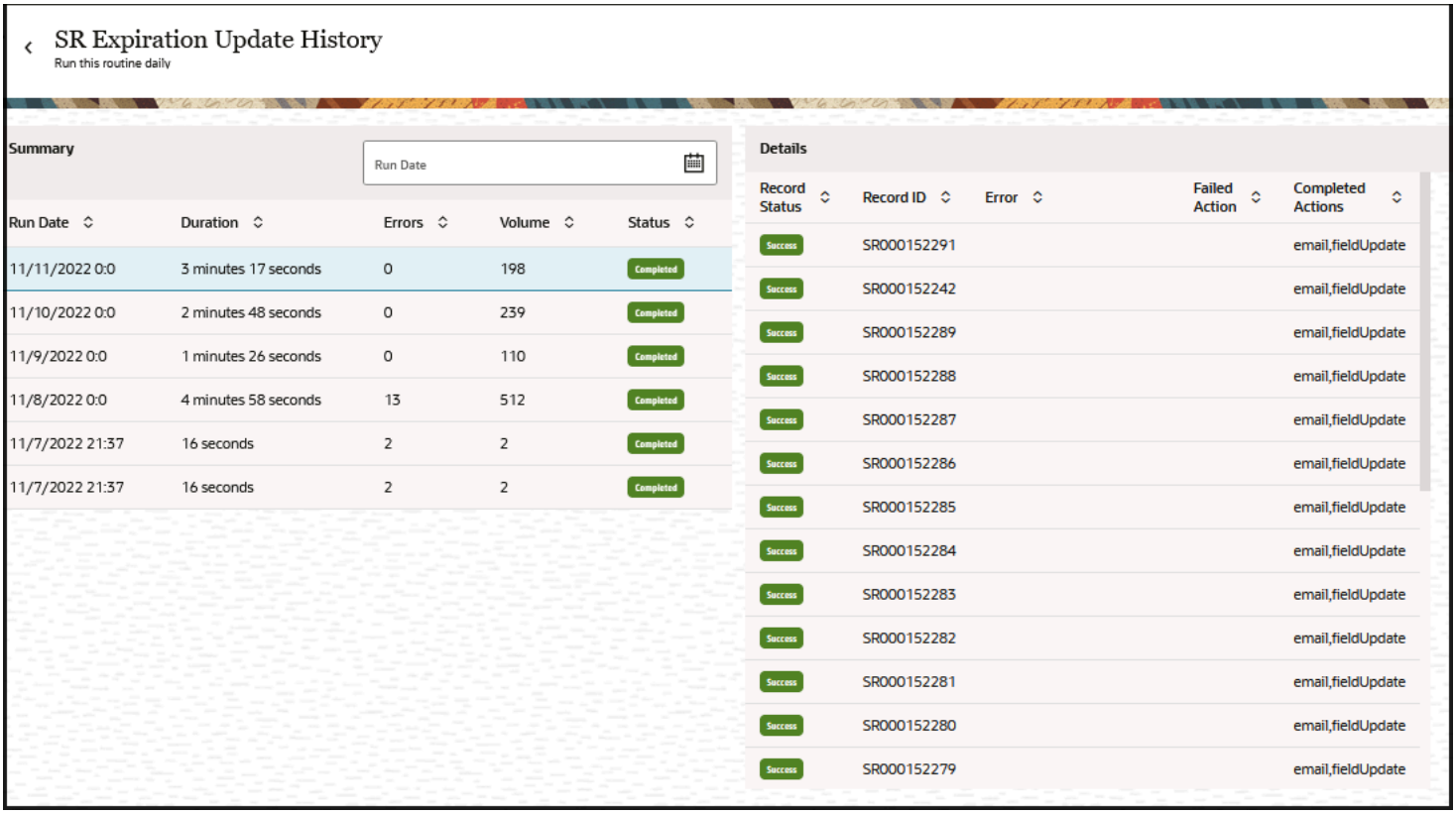
- Create, view, edit, and pause routines that are currently in process
- View schedule details
- View last run results
- View list of records processed by the routine

This table describes some of the routines processing information that you can view at a glance from the dashboard.

Status	Name	Object	Trigger	Last Run	Last Failed	Last Updated Date	Actions
Status of the routine such as Active or Paused.	Name of the routine.	Business object associated with the routine.	Indicates how often the routine runs according to it's schedule, such as daily, weekly, monthly or yearly.	Date of the last run for the routine.	The most recent date when the routine had a run with errors.	Date the routine was last updated.	Menu action to activate, edit, pause, view or run a routine.

Select the **View** menu item from the Actions (three dots icon highlighted in the screenshot) menu to view a summary of the routines that were run and to drill down to the records processed.

Select a row from the Summary section to view the details for the selected run. Here's a sample screenshot:



Use Routine Templates

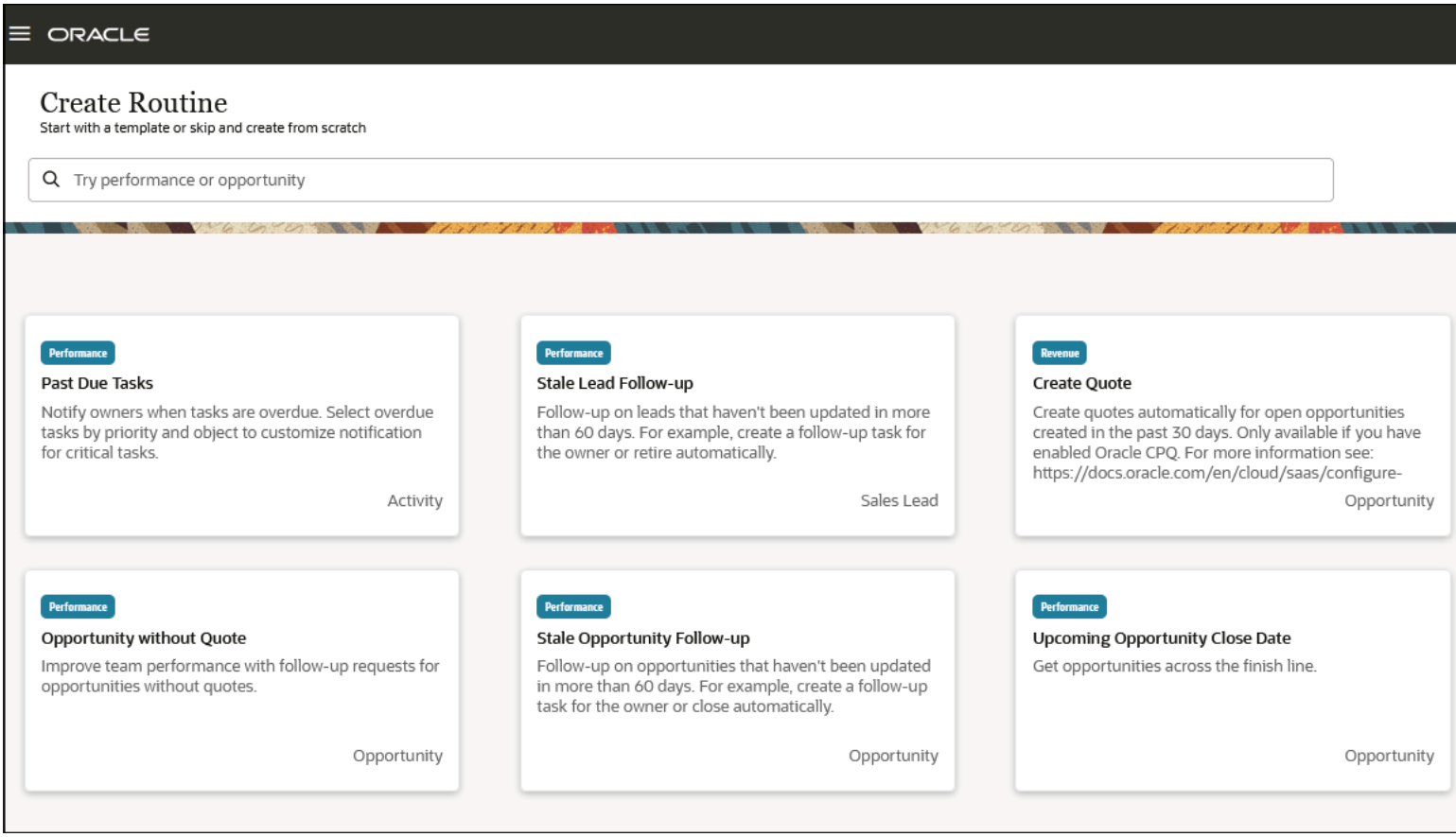
Routine templates are routine definitions that you, as a sales administrator, can use to quickly create a routine. You can copy a predefined routine template of your choice to help you configure routines.

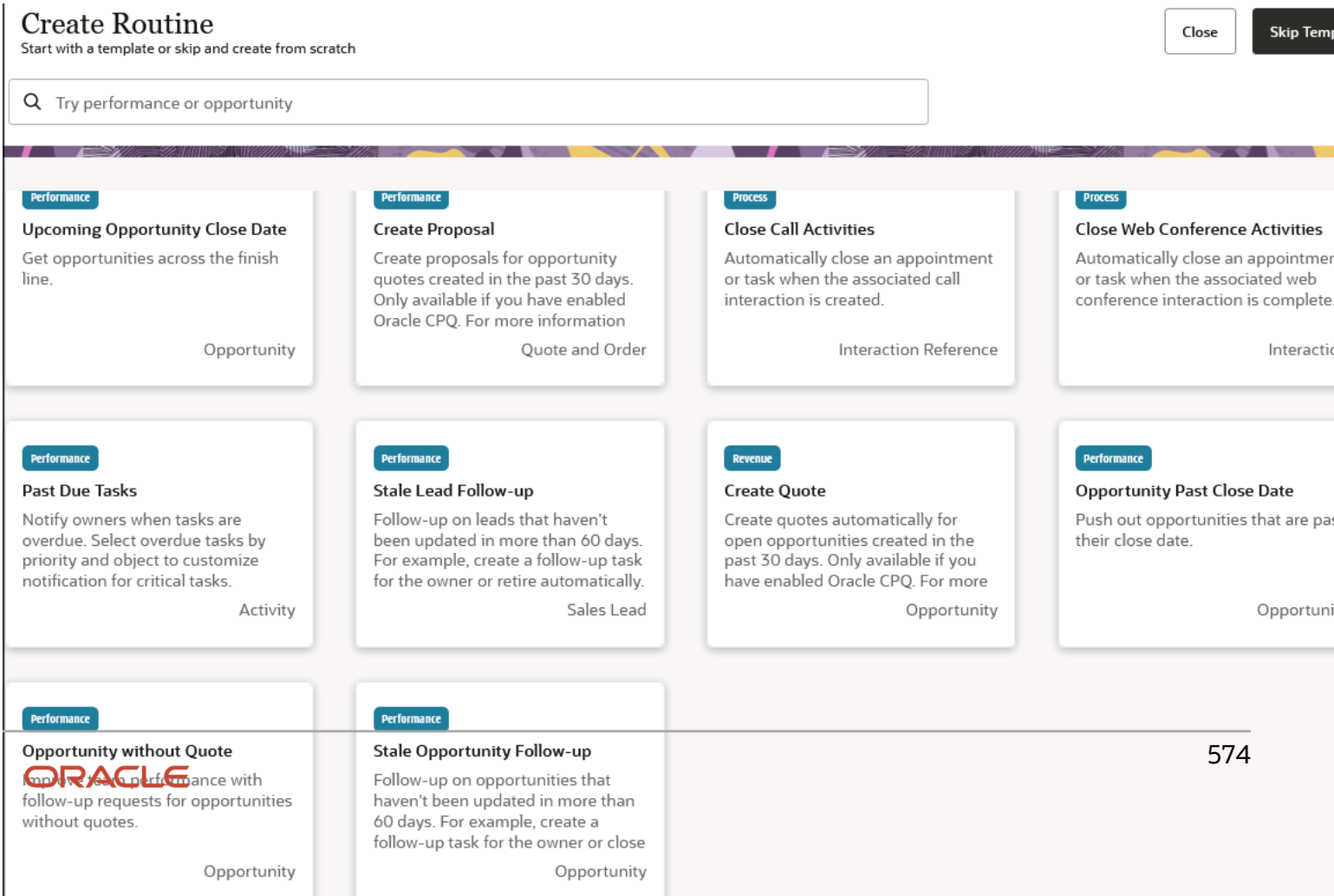
Routines can often contain complex rules and actions that aren't always apparent or easily understood. For example, past due tasks require knowledge about activity function code values and how they work. Templates contain sample actions and rules which you can easily modify to suit your requirements when creating custom-specific routines. You can't change the data of these predefined templates or create new templates.

Each routine template has a category defined such as Performance, Revenue, and Process and is denoted by the relevant badge icon. The sales object type is listed underneath the short description for the template. For example, the Create Quote template is associated with the Opportunity object and helps you configure a routine to create quotes automatically for selected opportunities. The Create Quote predefined template is only available if you have enabled Quotes. For more information see *Integrating CX Sales with Oracle CPQ* guide.

Here's a sample screenshot of some of the routine templates that are available to use.

> **Note:** You can click **Skip Templates** if you don't want to use one of the predefined templates to help create your routine.


ORACLE
Create Routine
Start with a template or skip and create from scratch
Try performance or opportunity
Performance
Past Due Tasks
Notify owners when tasks are overdue. Select overdue tasks by priority and object to customize notification for critical tasks.
Activity
Performance
Stale Lead Follow-up
Follow-up on leads that haven't been updated in more than 60 days. For example, create a follow-up task for the owner or retire automatically.
Sales Lead
Revenue
Create Quote
Create quotes automatically for open opportunities created in the past 30 days. Only available if you have enabled Oracle CPQ. For more information see: https://docs.oracle.com/en/cloud/saas/configure-
Opportunity
Performance
Opportunity without Quote
Improve team performance with follow-up requests for opportunities without quotes.
Opportunity
Performance
Stale Opportunity Follow-up
Follow-up on opportunities that haven't been updated in more than 60 days. For example, create a follow-up task for the owner or close automatically.
Opportunity
Performance
Upcoming Opportunity Close Date
Get opportunities across the finish line.
Opportunity


Create Routine
Start with a template or skip and create from scratch
Close
Skip Temp
Try performance or opportunity
Performance
Upcoming Opportunity Close Date
Get opportunities across the finish line.
Opportunity
Performance
Create Proposal
Create proposals for opportunity quotes created in the past 30 days. Only available if you have enabled Oracle CPQ. For more information
Quote and Order
Process
Close Call Activities
Automatically close an appointment or task when the associated call interaction is created.
Interaction Reference
Process
Close Web Conference Activities
Automatically close an appointmer or task when the associated web conference interaction is complete.
Interactio
Performance
Past Due Tasks
Notify owners when tasks are overdue. Select overdue tasks by priority and object to customize notification for critical tasks.
Activity
Performance
Stale Lead Follow-up
Follow-up on leads that haven't been updated in more than 60 days. For example, create a follow-up task for the owner or retire automatically.
Sales Lead
Revenue
Create Quote
Create quotes automatically for open opportunities created in the past 30 days. Only available if you have enabled Oracle CPQ. For more
Opportunity
Performance
Opportunity Past Close Date
Push out opportunities that are pas their close date.
Opportuni
Performance
Opportunity without Quote
Improve team performance with follow-up requests for opportunities without quotes.
Opportunity
Performance
Stale Opportunity Follow-up
Follow-up on opportunities that haven't been updated in more than 60 days. For example, create a follow-up task for the owner or close
Opportunity

List of Predefined Routine Templates

This table lists the predefined template name, short description, and category for the different sales objects.

Object	Name	Description	Category
Activity	Past Due Tasks	Notify owners when tasks are overdue. Select overdue tasks by priority and object to customize notification for critical tasks.	Performance
Conversation Messages	Close Email Activities	Automatically close a task when the associated email is sent. Only available with Redwood UX.	Process
Interaction	Close Web Conference Activities	Automatically close an appointment or task when the associated web conference interaction is complete. Only available with Redwood UX.	Process
Interaction Reference	Close Activities	Automatically close an appointment or task when the associated call interaction is complete. Only available with Redwood UX.	Process
Opportunity	Create Quote	Create quotes automatically for selected opportunities. Only available if you have enabled Quotes.	Revenue
	Opportunity Past Close Date	Push out opportunities that are past their close date.	Performance
	Upcoming Opportunity Close Date	Get opportunities across the finish line.	Performance
	Stale Opportunity Follow-up	Follow-up on opportunities that haven't been updated in more than 60 days. For example, create a follow-up task for the owner or retire automatically.	Performance
	Opportunity without Quote	Improve team performance with follow-up requests for opportunities without quotes.	Performance
Quotes and Orders	Create Proposal	Create proposals for quoted opportunities. Only available if you have enabled Quotes. For more information see *Integrating CX Sales with Oracle CPQ* guide.	Revenue
Sales Lead	Stale Lead Follow-up	Follow-up on leads that haven't been updated in more than 60 days. For example, create a follow-up task for the owner or retire automatically.	Performance

Automate Repeated Tasks with Routines

Create routines to do repeated tasks and free up time for your sales organization to focus on selling.

Watch video

You can create a routine to alert your users when opportunities are stuck and require attention to move them along the sales cycle. Or you can update obsoleted or outdated information and provide timely and relevant reminders for salespeople to focus on key customers.

Actions and rules instruct the routine what activity to perform on an object. For example, rules tell the routine which sales leads to process for the actions. You can group rules together and select whether all or any of the criteria must be met. You can include all or any of the group rules and there's a limit of 15 rules per group. Specify rules which need to be met in order for the routine to perform a certain action. You create and deploy the routine from the dashboard. Routines run on a recurring schedule, defined as daily, weekly, monthly and yearly and are scheduled through the Enterprise Scheduling Service (ESS) process.

> **Note:** If you're using Redwood UX, you'll have access to additional triggers to specify when the routine runs.

When you submit the routine, it's scheduled to run at the allocated time unless you choose to set pause for the specified run.

Create a Routine

Here's how to create a routine without selecting any of the predefined templates.

1. Navigate to **Configuration** > **Application Composer** > **Common Setup** > **Routines** to access the Routines Dashboard.
2. Click **Create Routine** and then click **Skip Templates**.
3. From the **Basic Details** section, enter a name and brief description for the routine and select the object you want from the object drop-down list.

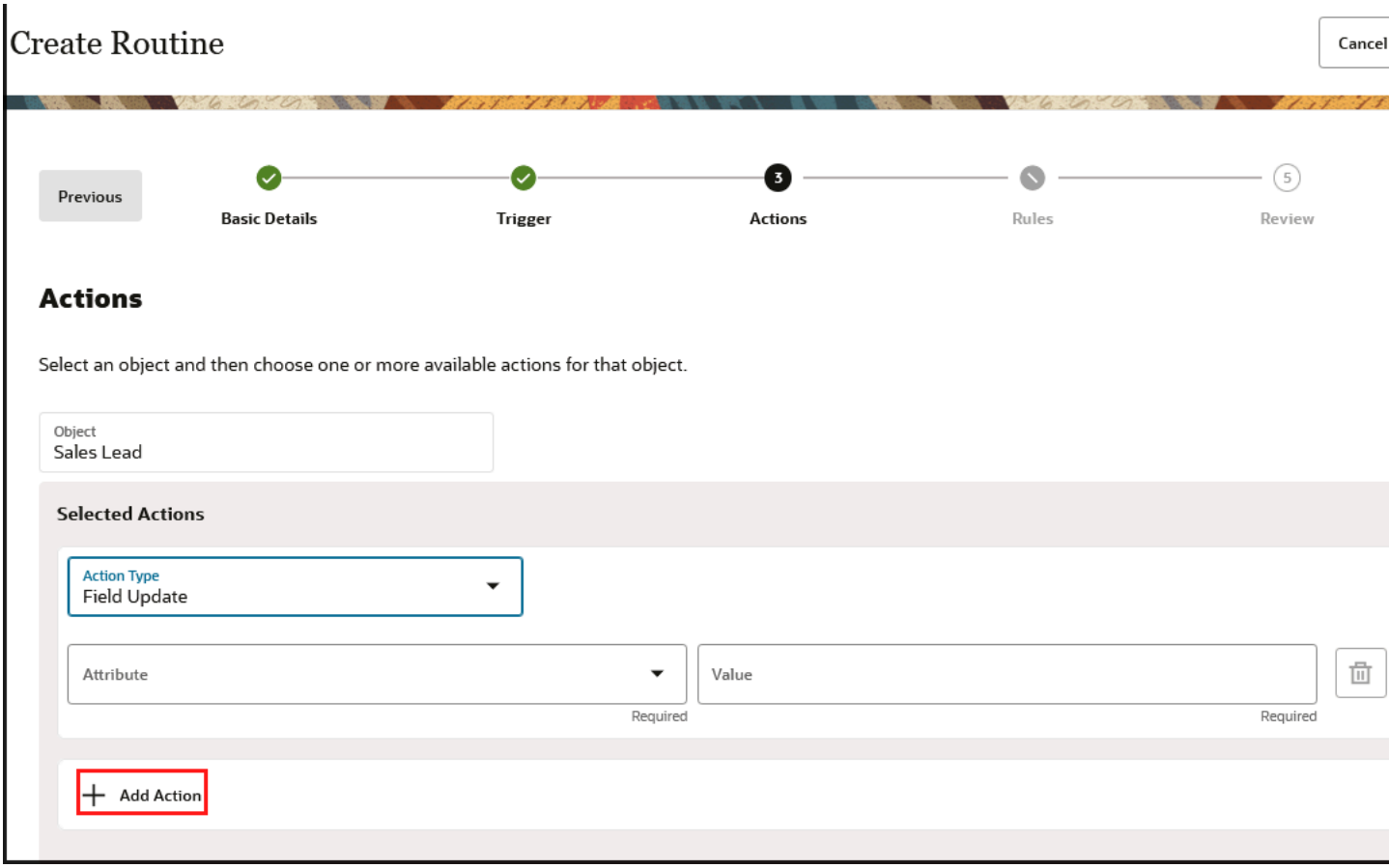
   You can also create routines for child objects as well such as lead and opportunity contacts, opportunity revenue, interaction references, and include their parent attributes in the rules.

   > **Note:** If you change the object as you proceed through the guided process, then any actions and rules for that object will be cleared automatically. You'll need to enter actions and rules again for the object you want.

4. Click **Next**.
5. From the **Trigger** section, select the frequency for which you want this routine to run from the list of available triggers.

   You can select from Hourly, Daily, Weekly, Monthly, or Yearly. In addition to the predefined frequency triggers, Redwood UX users will have the option to run the routine as soon as an attribute is changed or when a record is created, updated, or deleted. You can select up to 5 attributes if you choose to select the **Attribute changed** option.
6. Select the **Schedule routine with elevated access**checkbox to schedule the routine to run across all data for an object. Note that this checkbox is only available to users assigned the CA_SCHEDULE_ROUTINE_APPID privilege to their role.

7. Click **Next** to go to the **Actions** section as follows.



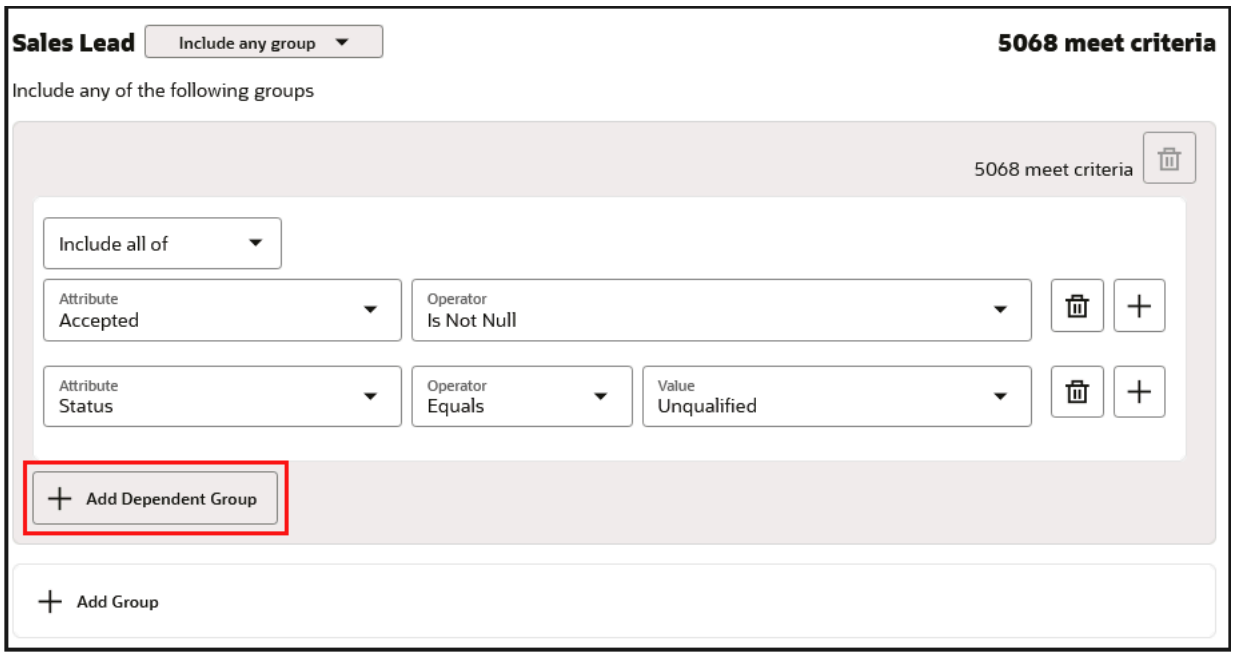
8. From the **Selected Actions** area, select the **Action Type** you want from the drop-down list.

   Fields marked updatable in Application Composer are available in the attribute list for the **Field Update** action.
9. Add the attributes and associated values for the selected Action Type and click the plus (+) icon to add additional attributes for the selected action type.
10. Click **Add Action** to add other action types. Click **Next** when finished to add rules for your action types.

11. From the **Rules** section, set up the rules and conditions that you want to meet to trigger the routine. Any recommendations based on your selected actions will be populated.
Fields specified as searchable in Application Composer are available in Rules from the attribute list.

    > **Note:** You can group conditions to create more complex rules. Within a group you can choose to include any or all the conditions and choose to include any or all groups.

    For key objects such as Account, Contact, Opportunity, and Sales Lead, you can add dependency rules by clicking the Add Dependent Group button as highlighted in this sample screenshot. Any dependent rule groups you add are added to the parent rules.



    a. Select **Include all groups** if you want all rule conditions to be met in order for the routine to perform a certain action. Or, select **Include any group** if you want any of the rules to trigger the action.
    b. Click **Add Dependent Group** to add a dependency rule condition for the selected groups area.
    c. Click **Add Group** to add a rule condition from the selected groups area.
12. Add the attributes and associated values for the selected group options.
13. Click **Next** to preview or edit your routine.
14. Click **Submit** to create your routine.

Supported Objects and Associated Actions for Sales Routines

Sales administrators and users with the appropriate access privileges can view and create routines from the routines dashboard. Other sales users can get access to configure and manage routines based on granting the appropriate functional privilege to their roles.

The following table lists the supported sales parent objects and their predefined associated action types for sales routines:

Supported Sales Parent Objects for Routines and Associated Action Types

Parent Object	Action Type
Account	• Field Update • Create Task • Send Email
Activity	• Field Update • Send Email
Asset	• Field Update
Business Plan	• Field Update • Send Email
Campaign	• Field Update
Case	• Field Update • Send Email
Contact	• Field Update • Create Task • Send Email
Conversation	• Field Update
Custom Objects	• Field Update • Send Email - available only if email annotations is enabled
Household	• Field Update • Send Email
Interaction	• Field Update • Close Activity • Send Email
Opportunity	• Create Quote **Note:** You must have Quotes configured to create a quote from the opportunity. • Create Task • Field Update • Send Email
Partner	• Field Update

Parent Object	Action Type
Partner Enrollments	• Field Update • Send Email
Product	• Field Update
Product Structure	• Field Update
Quotes and Orders	• Field Update • Create Proposal
Resource	• Field Update • Send Email
Sales Competitor	• Field Update
Sales Lead	• Field Update • Convert • Create Task • Send Email
Service Request	• Field Update • Send Email
Subscription	• Field Update • Send Email

Note: Not all the supported objects are sales objects. For example, Partner and Partner Enrollments are only pertinent for Partner Relationship Management, and Service Request are specific to Fusion Service. You can also access and manage any custom objects or custom child objects that your administrator created in Application Composer.

The following table lists the supported child sales objects and their predefined associated action types for sales routines:

Supported Sales Child Objects for Routines and Associated Action Types

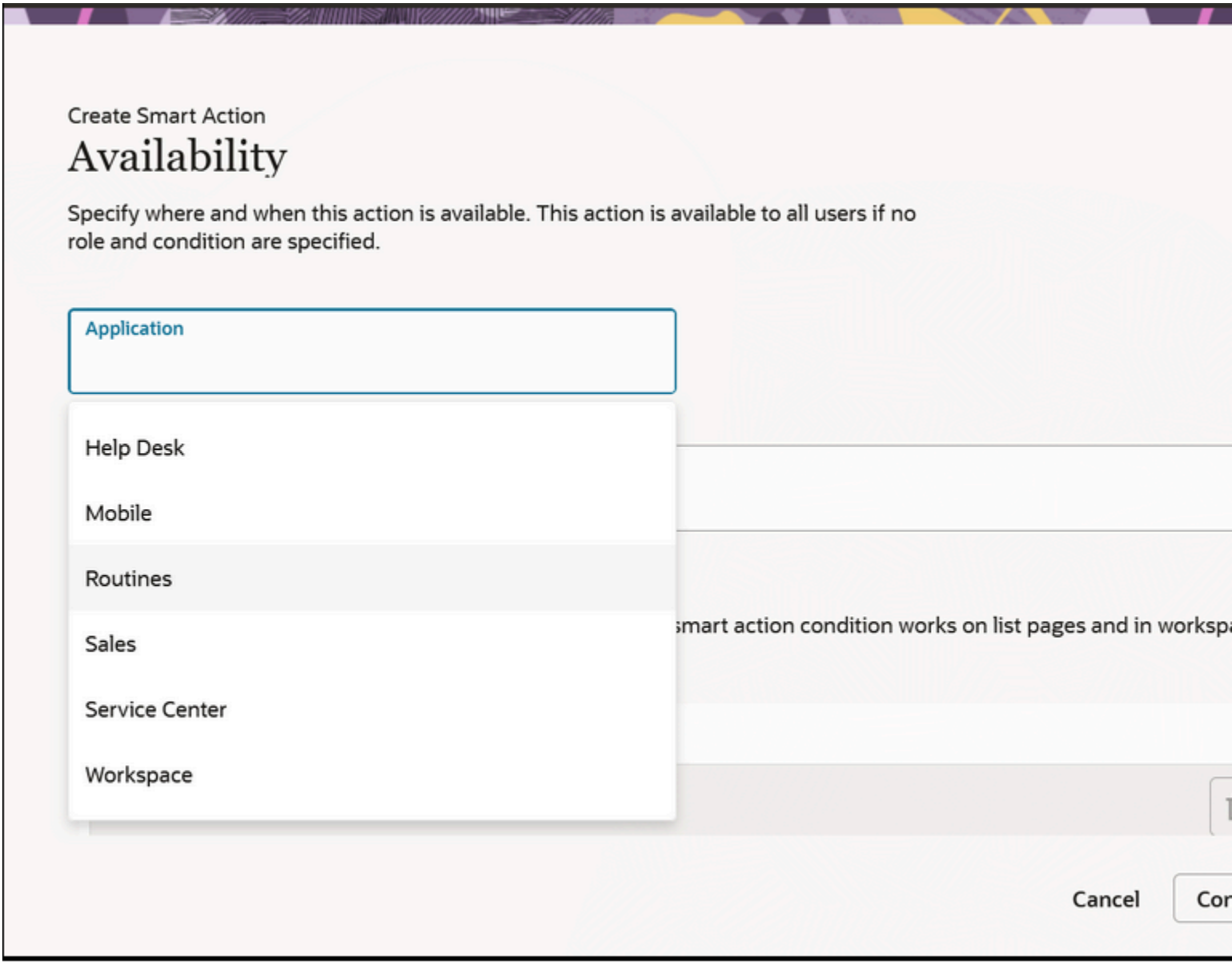
Child Object	Action Type
Component	• Field Update
Conversation Message	• Field Update • Close Activity
Conversation Reference	• Field Update

Child Object	Action Type
Custom Child Objects	• Field Update • Send Email - available only if email annotations is enabled
Interaction Reference	• Field Update • Close Activity
Opportunity Contact	• Field Update • Send Email
Opportunity Revenue	• Field Update • Send Email
Sales Lead Contact	• Field Update • Send Email

Use Custom Smart Actions Routines

As a sales administrator, you might want to create a routine to use object functions on both standard and custom objects. You can now use custom smart actions to perform custom processes in routines, such as API or object function calls. For example, if a lead owner doesn't have a sales representative role, then you can create a custom smart action to remove the owner so the lead gets reassigned. Other examples of where a custom smart action could be used in routines might be if you want to update a custom field with a formula.

You can create custom smart actions for routines as needed in Application Composer. Any custom smart actions that you create will show in your routines only if you selected **Routines** in the **Application** as shown is this sample Create Smart Action page.



See *Overview of Smart Actions* for information about how to use and create smart actions.

Object functions are groovy scripts that are defined for an object in Application Composer and are created in a sandbox. See the Object Functions section of the Configuring Applications Using Application Composer guide for more information about object functions.

> **Note:** Object functions are only callable by event routines and Accounts and Contacts don't support object function calls.

About Scheduling Routines

Understanding scheduling can help you determine the optimal recurrence period when creating routines. Routines run on a recurring schedule, defined as hourly, daily, weekly, monthly, and yearly.

To schedule and run routines, you must have the appropriate privileges and job roles. For example:

- You must first already have access to Routines via the privilege, ZCA_MANAGE_ROUTINES.
- The ZCA_SCHEDULE_ROUTINE_APPID privilege must be assigned to the desired role. If you are working with custom objects, you will also require the ORA_CRM_EXTN_ROLE role.

During the trigger step of the Create Routine work flow, you can select the **Schedule routine with elevated access** check box if you want to schedule the routine to run across all data for an object. Once a routine is created with elevated access, the access can't be changed.

Routines are scheduled through the Enterprise Scheduling Service (ESS) process and are included as part of your daily application processing.

For optimal performance, the application:

- Divides each day into 24 available time slots
- Assigns a maximum of 5 routines to start for each time slot
- Sets a maximum limit of 10,000 rows a routine can process per time slot.

Once a routine is assigned a day and time slot, it continues to run on that specific day and time. The application schedules to run routines between days 1 to 28 of the month.

Here's a table that lists the maximum number of routines in a day for each schedule period and the maximum number of routines that can be run for a schedule period.

Routine Scheduling Details

Schedule Time Periods	Total Daily Time Slots	Total Time Slots per Period
Hourly	24	Hourly routines are limited to 250 records per run.
Daily	80	Schedule up to 80 routines daily.
Weekly	20	Schedule up to 140 routines weekly.
Monthly	15	Schedule up to 420 routines monthly.
Yearly	5	Schedule up to 1,680 routines yearly.

Rules

Dependency Rules for Key Objects

You can add dependency rules when creating routines for key objects such as accounts, contacts, leads and opportunities.

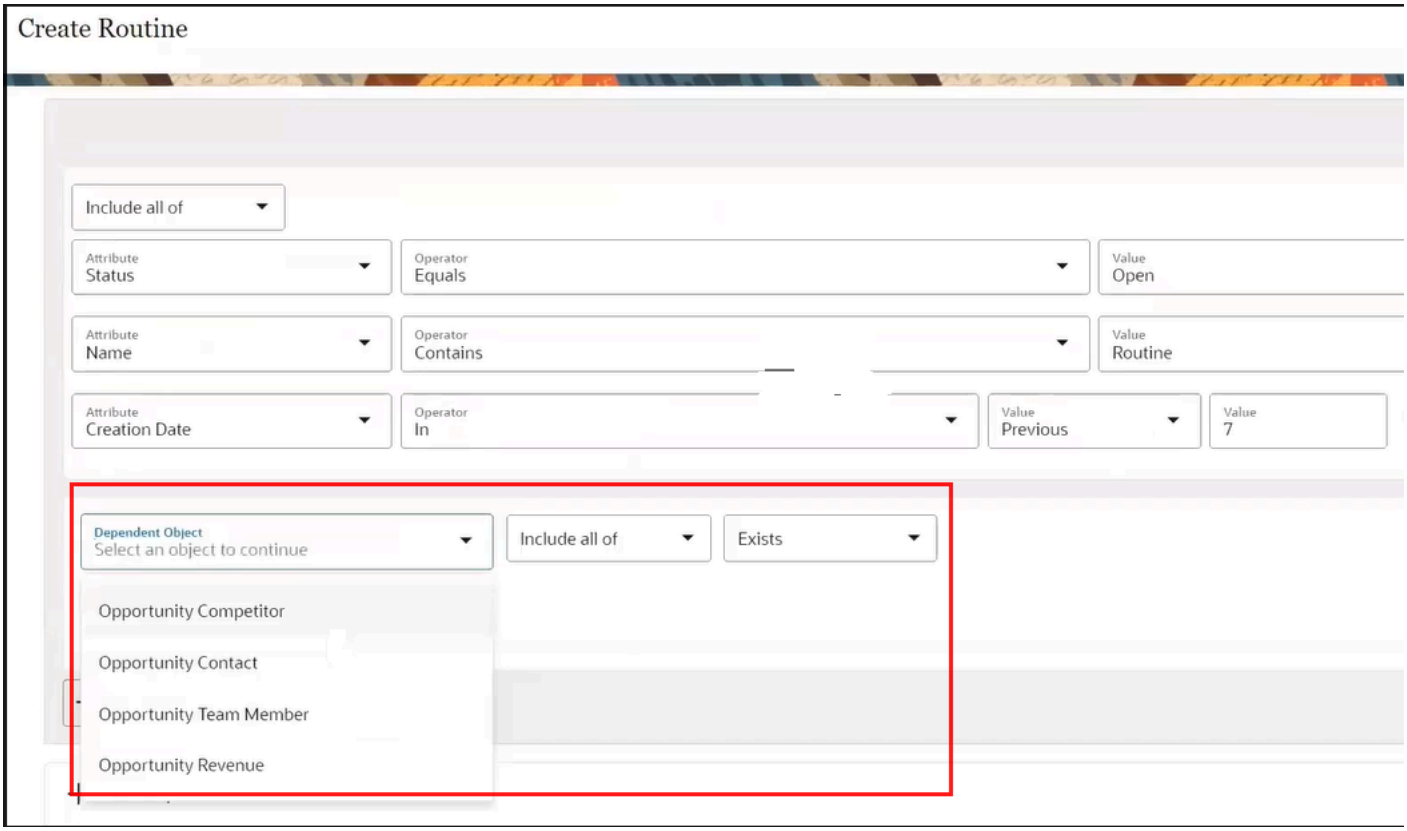
Routines are designed to perform a specific action based on a set of rules. As a sales administrator, you can create and update simple, lightweight routines to help sales representatives, administrators, and data stewards to automate an action for pertinent sales information. Routines can scan records to evaluate if they meet conditions over a period of time. For example, you might want to create a routine to scan all opportunities that haven't be updated in past few weeks.

This table lists the dependency rules associated with key objects when creating a routine.

Object	Dependency Rule
Account	• Address • Sales Team Member
Contact	• Address • Sales Team Member
Opportunity	• Opportunity Competitor • Opportunity Contact • Opportunity Team Member • Opportunity Revenue
Sales Lead	• Sales Lead Contacts • Sales Lead Products • Sales Lead Resources • Sales Lead Territories • Opportunities

You set up the rules and conditions that you want to meet in order to trigger the routine. From the Rules section of the Create Routine guided process, you can group conditions to create more complex rules and choose to include all or any of the groups.

For key objects such as Account, Contact, Opportunity, and Sales Lead, you can add dependency rules by clicking the Add Dependent Group button. Here is a sample of where you add rules for the Opportunity dependent objects.



Enter Run Date Values for Routine Rules

When setting rules for date-based related attribute such as Last Update Date, Creation Date, Close Date and so on, selecting the equals (=) operator lets you choose from the Run Date and Select Date options.

Routines also let you specify date variables to calculate the date based on the routine run date, plus or minus a specific number of days in integer format. For example, for the Update Field and Create Task actions you can create a task or update a field with a due date of the routine run date plus 7 days. This means that if all routines rules are met, the routine will continue to process and update records 7 days past the specified due date.

Here's how to enter run date values for date-related attributes when creating rules.

1. From the Routines dashboard, click **Create Routine**.
2. Enter the name and a brief description of what the routine is used for and select the object you want for your routine.
3. From the Actions section, click **Add Action** and select the **Action Type** you want.
4. From the Rules section, set up the rules and conditions that you want to meet in order to trigger the routine.

   > **Note:** If you want to set a value for, let's say, the opportunity Close Date attribute, then if you select the "since" operators, you get additional options to select either a specific quarter, such as This Quarter, Next Quarter or Last Quarter. You can also select a flexible run date, or you can set a specific calendar date.Also, when you select **Run Date**, you can select a plus or minus operator to either add or subtract a number of days value to the set run date. For example, you can select the plus operator to enter a numeral in the Value field.

5. Schedule, review and click **Submit** when done.

FAQ for Routines

Frequently Asked Questions (FAQs) for Routines

This section contains some frequently asked questions (FAQs) when working with routines.

Scroll or search to find answers to common questions.

How do I pause routines?

You can view routines from the dashboard at any stage. Once you create a routine, the application schedules it to run at the next available slot. If you want to stop a routine from running, select the **Pause** menu item from the Actions (three dots icon) menu. You can click **Activate** to restart the routine process again for your routine.

Why can't I find the attribute I want to update for my routine?

Only attributes defined as **Updateable** in Application Composer are available for use in the Field Update action. In addition, attributes available in the Rules section must also be set as **Searchable** in Application Composer.

When must I specify the currency code in my routine?

If you're updating currency amounts, you must specify the currency code in the rules section and field update action for your routine.

Can I stop actions being performed on the same records?

You can stop actions being performed on the same record each time you run a routine.

Rules are applied to select records for processing when a routines runs. If you don’t want the actions performed on the same records each time, then include rules that exclude previously run records.

Let's say you have a routine that updates the record status to Won for opportunities with a Close Date in the last quarter. To ensure that those records already updated to the won status aren't processed again, you can insert a rule that checks only for all opportunity records with a status of not equal to Won.

Why can't I add another rule to my routine group?

A maximum of 15 rules is allowed per group for a routine. You can add another group to specify additional rules.

What is the difference between Attribute Changed and Record Updated triggers?

The **Attribute Changed** trigger is the recommended trigger for change event routines where you can enter up to 5 fields. For example, a routine runs (or is triggered) when the specified number of fields change on the record.

However, in some scenarios, you may need to enter more than 5 change fields to trigger the routine. In such cases, you can use the **Record Changed** trigger which causes the routine to run whenever the record is updated.

> **Note:** In a future release, the specified number of fields for the **Attribute Changed** trigger will increase from 5 fields, and the **Record Changed** trigger will no longer be needed for new routines.

Why don't I see lists of values for DCL and CLOB field types when creating rules for my Routine?

List of values aren't displayed in the Value field for Dynamic Choice List (DCL) field types in the Rules section of the **Create Routine** guided process. They're not supported and Oracle recommends that you not use DCL, Character Large OBject (CLOB), or any transient fields when creating Routine rules.

However, you can use DCL fields from Routines by manually entering the values. The value you manually enter must exactly match the LOV entry. At runtime, if a record meets the rule conditions, it will be selected.

39 Quoting

Overview of the Oracle Sales and Oracle CPQ Integration

The integration between Oracle Sales and Oracle CPQ supports standard B2B selling processes, which feature highly configurable products, variable or dynamic pricing models, discount negotiations requiring executive approval, and large, branded sales documents.

Oracle CPQ ensures that sales forecasts are reliable and based on real-world quotes. It ensures that sales orders are valid and contain the correct billing and shipping details to eliminate costly change orders. Additionally, quote data feeds back into Sales, so that businesses can analyze and improve the overall efficiency of their sales teams.

The integration steps help you configure a solution that combines the power of these applications, while reducing the cost of ownership and the time needed to deploy the application. However, the integration remains configurable and extensible, so it can support a wide range of use cases serving any industry. For more information, see *Overview of Planning Your Implementation*.

40 LinkedIn Sales Navigator

Overview of LinkedIn Sales Navigator

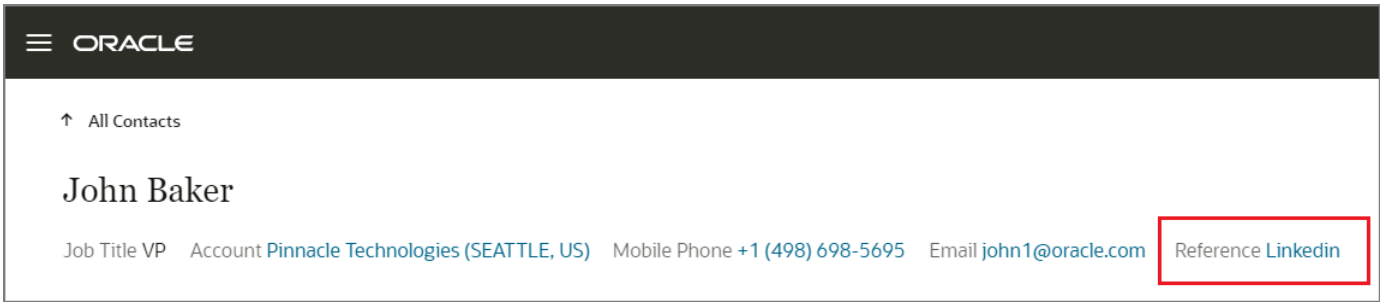
LinkedIn Sales Navigator helps sales teams acquire new business, expand existing customer relationships, and maximize sales productivity.

Oracle Sales integrates with LinkedIn Sales Navigator and maps LinkedIn profiles with sales contacts. Salespeople can view the LinkedIn profile of a contact, find an icebreaker to connect with the contact, and get introduced to the contact. They can send in-mails or messages from LinkedIn to stay connected - all with the goal of improving sale prospects.

To enable the integration, you need to register LinkedIn with the sales application. After that, display the LinkedIn link for Digital Sales contacts using Oracle Visual Builder Studio and use Application Composer to enable LinkedIn for accounts, contacts, and leads in CX Sales.

Where Does the LinkedIn Link Appear?

After the integration, the LinkedIn link appears in the contact overview. Here's a screenshot of the contact overview showing the link location in **Reference**:



In CX Sales, your sales team can use the Show LinkedIn link on the Details layout of Accounts, Contacts, and Leads.

What You Need to Have for Setting Up the Integration

You need to have these privileges and licenses:

Privileges and Licenses Required	Description
Sales Administrator role	Sales administrative rights to register and configure a partner application in LinkedIn.
Active LinkedIn account	An active LinkedIn account and remain in agreement with the terms and conditions of your contract. **Note:** When you sign in to LinkedIn for the first time, you must click **Allow** for your authorization consent.

Privileges and Licenses Required	Description
LinkedIn license	• A LinkedIn license that includes REST API support. • Permissions to have a fully configured application (grants approved from LinkedIn team). • Get the client ID and client secret for the partner application. **Note:** The refresh token expiration for LinkedIn is 365 days. Salespeople will be asked to authenticate and authorize their LinkedIn application after 365 days.

Related Topics

- See the LinkedIn Profile of a Contact

Overview of LinkedIn Sales Navigator Integration Setup

The table here shows the setups you need to complete to integrate the LinkedIn Sales Navigator with your sales application.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Digital Sales and CX Sales	Register LinkedIn Sales Navigator with the sales application from the Setup and Maintenance work area.	**Setup and Maintenance** > **Sales** > **Integrations** > **Setup LinkedIn Integration**	See the topic: *Register LinkedIn with the Sales Application*
2	Digital Sales	Enable the LinkedIn extension app in Visual Builder Studio for Digital Sales contacts.	**Digital Sales** > **Contacts** > **Edit Page in Visual Builder**	See the topic:*Enable the LinkedIn Link Using the Visual Builder Studio*
3	CX Sales	If applicable, remove the mashup content for LinkedIn Sales Navigator for accounts. Use Application Composer to hide previously exposed mashup content for LinkedIn Sales Navigator for accounts. Mashup content may have been exposed as a custom subtab, so you must ensure that you remove any custom instances of the mashup content for LinkedIn Sales Navigator for accounts.	**Navigator** > **Configuration** > **Application Composer**	See the topic: *Remove Mashup Content for LinkedIn Sales Navigator for Accounts*
4	CX Sales	Enable LinkedIn Sales Navigator for Accounts, Contacts, and Leads	**Navigator** > **Configuration** > **Application Composer**	See the topic:*Enable LinkedIn Sales Navigator for Accounts, Contacts, and Leads*

Register LinkedIn with the Sales Application

You need to register LinkedIn with the sales application:

1. In the Setup and Maintenance work area, use the **Setup LinkedIn Integration** task:
   - Offering: Sales
   - Functional Area: Integrations
   - Task: Setup LinkedIn Integration

   The Create LinkedIn Application page appears that shows Unique ID, Name, OAuth Redirect URL, and Whitelisted Domains prefilled with details.

Unique ID	Unique ID that represents the customer identifier
Name	Display name of the child application
OAuth Redirect URL	Contains the URL of your pod information
Whitelisted Domains	Domains approved for authorized access to data

2. Click **Create**.

   The LinkedIn Application page shows two additional fields: **Application ID** and **Application Key**.

Application ID	Client ID value, used during OAuth 2.0 token request flow.
Application Key	Client Secret value, used during OAuth 2.0 token request flow.

Related Topics

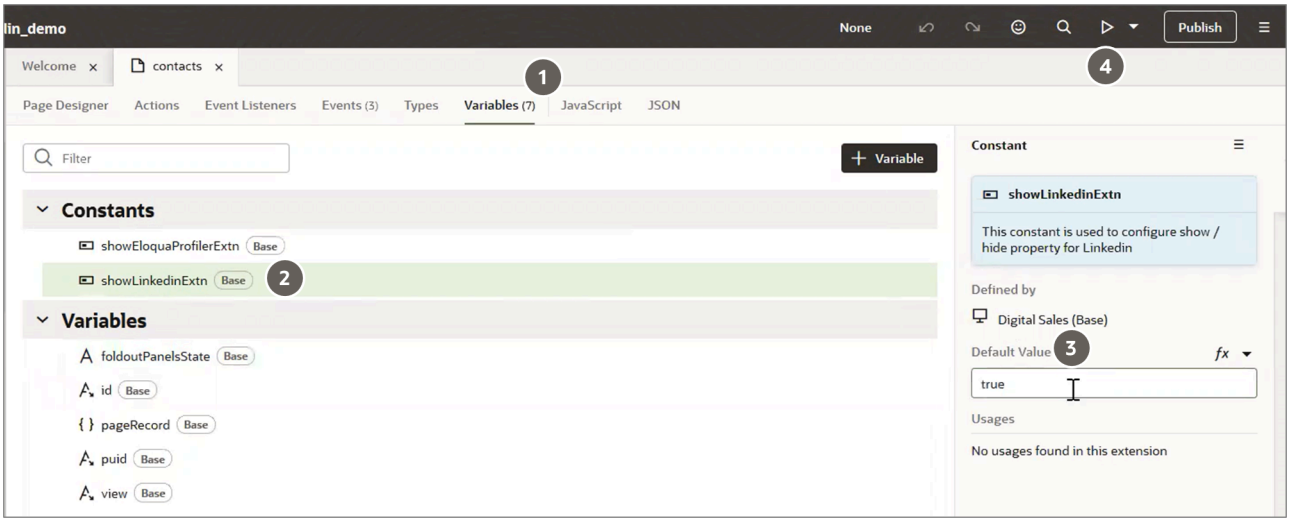
- See the LinkedIn Profile of a Contact

Enable the LinkedIn Link Using the Visual Builder Studio

1. Create a workspace in Visual Builder Studio.

   See "Create Your Own Workspace" in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative.
2. Sign in to the sales application and Visual Builder Studio simultaneously.

3. In Digital Sales, open the page you want to add LinkedIn to. For example, if you want to add LinkedIn to the Contact foldout view, navigate to **Digital Sales** > **Contacts** and select a contact from the landing page.
   The Contact foldout view appears.
   a. On the Contact foldout view, click your username in the global header and select **Edit Page in Visual Builder**.
4. In the Visual Builder Studio, open the Workspace you just created and go to the Variables tab.
   Here's a screenshot of the Variables tab that shows the LinkedIn extension app under the Constants header. The Variables tab, LinkedInExtn, Default Value field, and the play icon on the page are highlighted using callouts from 1 to 4.



   a. In the Variables tab (callout 1), under the Constants header, select **showLinkedinExtn** (callout 2).
   b. On the right-side pane, enter **True** for Default Value (callout 3).
5. Click the play icon (callout 4) to see the preview of the page with the LinkedIn link.
6. Click **Publish**.
   The LinkedIn link appears in a contact's basic information.

Also refer to the *See the LinkedIn Profile of a Contact* topic in the Using Digital Sales guide.

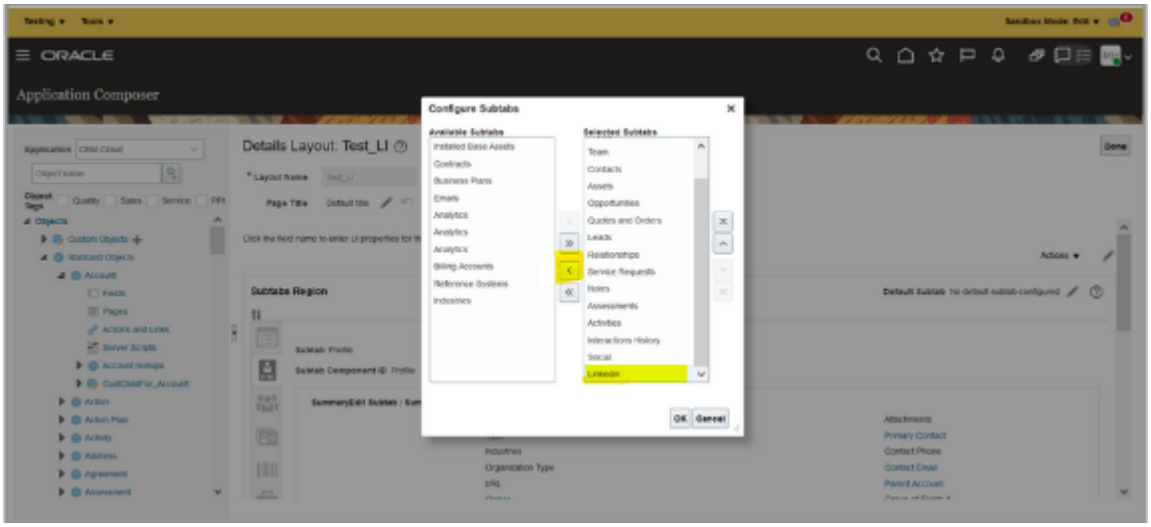
Remove Mashup Content for LinkedIn Sales Navigator for Accounts

Follow these steps to remove previously exposed mashup content for LinkedIn Sales Navigator for accounts.

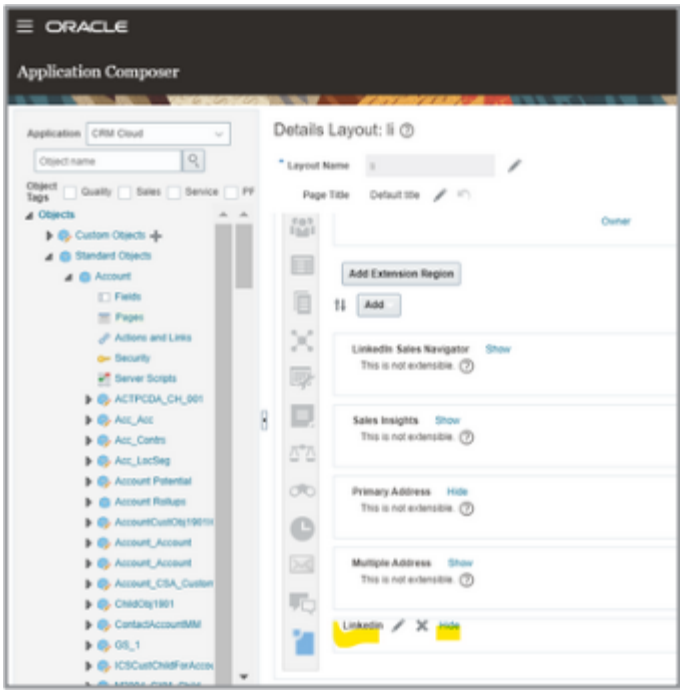
1. Sign in as a sales administrator or as a setup user.
2. Create and activate a sandbox.
3. Click **Navigator** > **Configuration** > **Application Composer**.
4. In the Objects navigation tree, expand **Standard Objects** and then expand **Account**.
5. Click the **Pages** node.

6. Ensure that the **Application Pages** tab is selected.
7. In the Edit Account region, select the existing layout where LinkedIn mashup content is already exposed.

> **Note:** Mashup content could also have been exposed as a custom subtab, so you must ensure to remove any custom instances of the mashup content for LinkedIn Sales Navigator for accounts.



8. In the existing Details Layout page, click the icon for the **Profile** subtab.
9. Click the **Hide** link for the LinkedIn mashup content.



10. Click **Done**.
11. Publish the sandbox.
12. Verify that the LinkedIn Sales Navigator is no longer visible on the Edit Account: Profile page for an account.

Enable LinkedIn Sales Navigator for Accounts, Contacts, and Leads

The LinkedIn integration maps LinkedIn profiles with sales records and renders relevant contact and lead details to salespeople. Salespeople can target, understand, and engage with contacts and leads directly within the sales application.

Let your salespeople access LinkedIn Sales Navigator from an account profile page, a contact's profile page, or from the edit lead page. Use the Application Composer to enable LinkedIn on the Details layouts of the object pages.

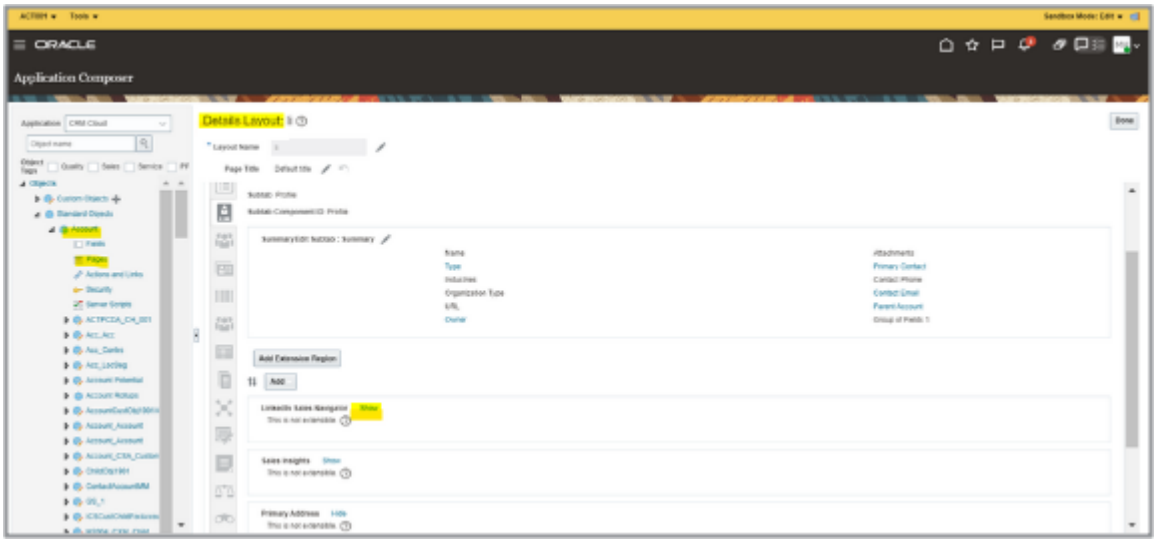
> **Note:** The integration doesn't synchronize data between the sales application and LinkedIn; therefore data isn't stored in either application.

Enable LinkedIn Sales Navigator for Accounts

1. Enter an active sandbox.
2. Click **Navigator** > **Configuration** > **Application Composer**.
3. In the Objects navigation tree, expand **Standard Objects** and then expand **Contact**.
4. Click the **Pages** node.
5. Ensure that the **Application Pages** tab is selected.
6. In the Edit Account region, select the standard layout page, and then click the duplicate layout icon to duplicate and edit the resulting copy.
7. In the new or existing Details Layout page, click the icon for the **Profile** subtab.

   > **Note:** If your existing layouts had LinkedIn mashup content, then you must hide the old LinkedIn mashup content and expose **LinkedIn Sales Navigator**. Mashup content could also have been exposed as a custom subtab, so you must ensure to remove any custom instances of the mashup content for LinkedIn Sales Navigator for accounts.

8. Click the **Show** link for the LinkedIn Sales Navigator region. Here's a screenshot of the Account Details layout, highlighting the Show button next to the LinkedIn Sales Navigator option.



9. Click **Done**.
10. Publish the sandbox.
11. Verify that the LinkedIn Sales Navigator is enabled on the Edit Account: Profile page for an account.

For more information about extending application pages and creating a custom layout, see the *Configuring Applications Using Application Composer* guide.

Enable LinkedIn Sales Navigator for Contacts

1. In the Objects navigation tree of Application Composer, expand **Standard Objects** and then expand **Contact**.
2. Click the **Pages** node.
3. Ensure that the **Application Pages** tab is selected.
4. In the Edit Contact region, select the standard layout page, and then click the duplicate layout icon to duplicate and edit the resulting copy.
5. In the new Details Layout page, click the icon for the **Profile** subtab.
6. Click the **Show** link for the LinkedIn Sales Navigator region.
7. Click **Done**.
8. Publish the sandbox.
9. Verify that the LinkedIn Sales Navigator is enabled on the Edit Contact: Profile page for a contact.

Enable LinkedIn Sales Navigator for Leads

1. In the Objects navigation tree of Application Composer, expand **Standard Objects** and then expand **Sales Lead**.
2. Click the **Pages** node.
3. Ensure that the **Application Pages** tab is selected.
4. In the Details Page Layouts region, select the standard layout page.
5. Click the duplicate details layout icon to duplicate and edit the resulting copy.
6. In the new Details Layout page, click the icon for the **Summary** subtab.
7. Click the **Show** link for the LinkedIn Sales Navigator region.
8. Click **Done**.
9. Publish the sandbox.
10. Verify that the LinkedIn Sales Navigator is enabled on the Edit Lead page for a lead.

Additional Information

Supported Platforms for the LinkedIn and Sales Integration

LinkedIn supports the current and last major revision of these desktop browsers, and recommends moving to one of these as soon as possible for a better and improved user experience.

- Google Chrome
- Mozilla Firefox
- Microsoft Edge
- Apple Safari

Note: LinkedIn no longer supports Microsoft Internet Explorer 11 (or below).

For mobile applications, LinkedIn supports the current and previous major releases of the following browsers:

- Google Chrome
- Microsoft Edge
- Apple Safari
- Android-based web browsers

Disable Restrictive Security Settings

If your browser is set to block third-party cookies, then the security setting must either be disabled. Alternatively, you can add `https://www.linkedin.com` as an allowed domain. For example, an iframe may not load if the security settings of the browser are very restrictive. If the domain of the application being loaded isn't `linkedin.com`, enable third-party cookies or JavaScript within the browser to load the iframe.

41 Web Conference Integration

Overview of Web Conference Integration Setup

You can setup and enable Web Conference integration for your sales organization. Once integrated, salespeople can start a Zoom or web conference meeting or schedule a zoom meeting from within their sales application.

When you complete the integration of your Digital Sales application with Zoom for Web Conferencing, users can:

- Start Zoom meetings
- Verify and update meeting participants as contacts while the meeting is ongoing
- Take notes and record the meeting outcome

Before You Begin

To activate the web conference feature, you must first raise a service request from My Oracle Support who will then issue you with a promotion code. You must also have an active Zoom account and remain in agreement with the terms and conditions of your contract to successfully configure the web conference and your sales application integration. Also, note that your zoom license must include REST API support, as well as the necessary permissions to manage meetings and recordings.

Summary of Setup Steps

Here's a summary of the steps to enable and integrate a web conference app for your sales organization.

1. Create your own OAuth Application in Zoom.

   An OAuth app defines a set of Zoom APIs to allow Oracle access those APIs on your behalf. The OAuth app can be private and doesn't need to be published. For more details, see the Create an OAuth Application in Zoom section of the Configure Web Conference for Your Sales Application topic.
2. Instead of making repeated calls to pull data frequently from an API, such as a Zoom account, Webhooks retrieve the required information about events that happen. The Zoom account must install your Webhook-enabled app to authorize data flow via Webhooks. For more details, see the Enable Webhooks for Web Conference section of the Configure Web Conference for Your Sales Application topic.
3. From your CX Sales application, navigate to the **Manage Web Conference Integration** task in **Setup and Maintenance** to complete and activate the integration. For more details, see the Complete Your Web Conference Integration section of the Configure Web Conference for Your Sales Application topic.

Configure Web Conference for Your Sales Application

To active the web conference feature, you must first raise a service request from My Oracle Support who will then issue you with a promotion code.

Note: You need the Configure Oracle Fusion Applications Offering privilege (ASM_CONFIGURE_OFFERING_PRIV) in your user role to enter the promotion code in the application.

When you receive a promotion code to activate Web Conferencing, follow these steps to enter it in your sales application.

1. Click **Navigator** > **My Enterprise** > **Enterprise** work area.
2. On the Enterprise Information page, click **Manage Promotion Code**.
3. On the Manage Promotion Codes page, click **Enter Promotion Code**.
4. On the Enter Promotion Code dialog box, enter the promotion code, and click **Save and Close**.

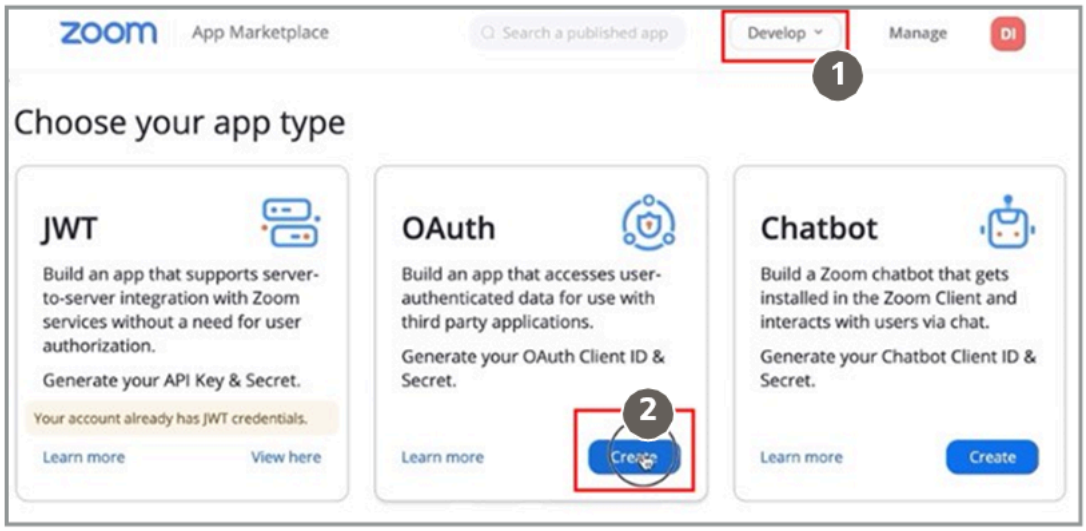
The promotion code you entered appears in the Part Number column on the Manage Promotion Codes page.

Once you've entered your promotion code, follow the steps to enable, integrate, and verify a web conference app for your sales application.

Create an OAuth Application in Zoom

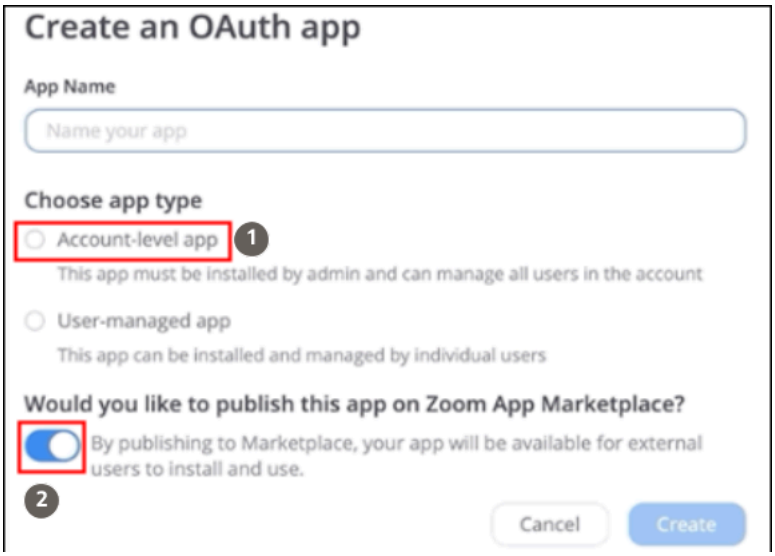
Here's how to create an OAuth application in Zoom.

1. Sign in to Zoom as a setup user with access to the Zoom Marketplace and with the necessary privileges to build apps.
2. Navigate to your profile page and select the **Advanced** drop-down option.
3. From the **Advanced** drop-down menu, select **App Marketplace**. You're redirected to the App Marketplace website.
4. Select the **Develop** drop-down menu (callout 1 in the screenshot), and then click Build App.



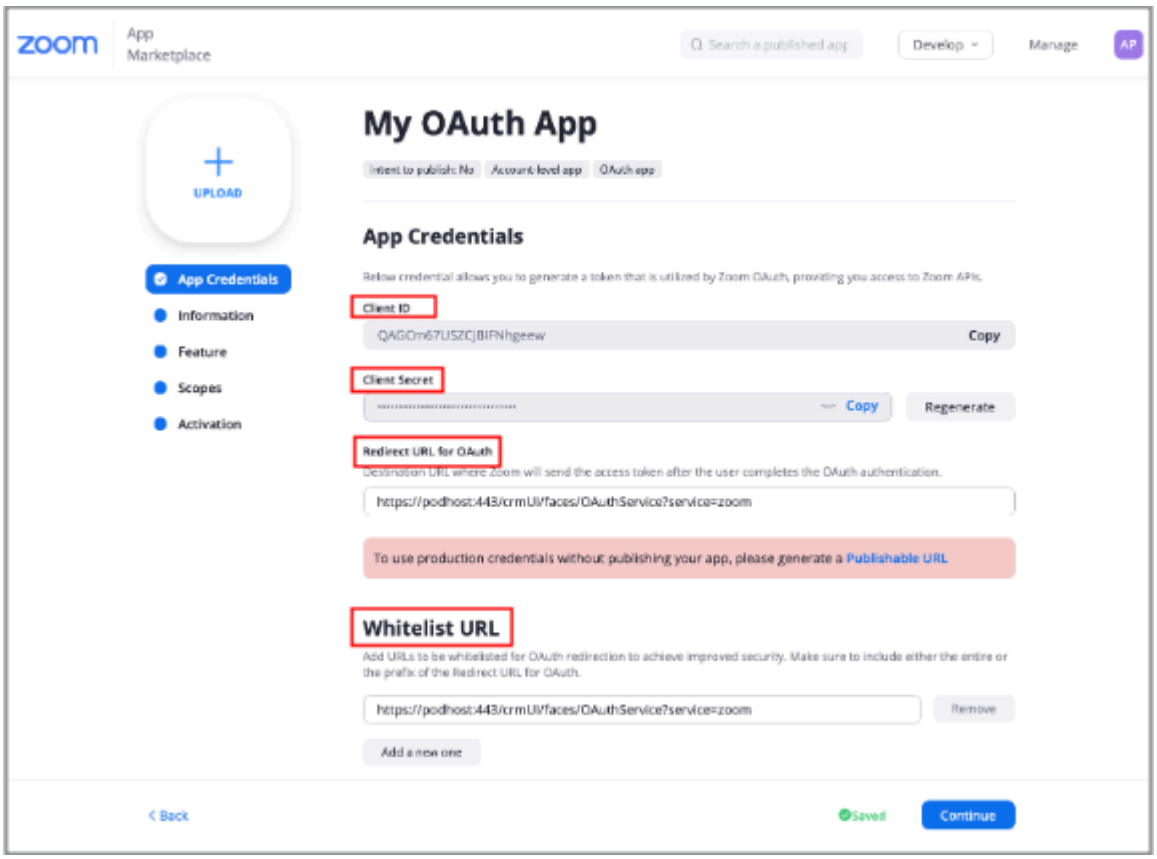
5. From the OAuth panel, click **Create** (callout 2 in the screenshot).
6. From the Create an OAuth app page, type your application name in the **App Name** field.

7. Select the **Account-level app** option (callout 1) and deactivate the **Would you like to publish this app on Zoom App Marketplace?** toggle (callout 2 in the screenshot).



8. Click **Create**.
   You're redirected to the **App Credentials** tab from where you can copy the **Client ID** and **Client Secret**.

   > **Note:** The Client ID and the Client Secret are necessary to complete and activate the Zoom integration with your sales application.



9. In the **OAuth Redirect URL** field, enter your platform destination URL where Zoom will send the access token after you complete the OAuth authentication.
10. In the **Whitelist URL** section, insert your platform full domain in the following format: `https://[podhost:podport]/crmUI/faces/OAuthService?service=zoom`.

    > **Note:** You can also get this URL from the **OAuth Redirect URL** field in the Manage Web Conference Integration task in Setup and Maintenance. See the Complete Your Web Conference Integration section below.

11. Click **Continue**.
12. In the **Information** section, complete the Basic Information for your app by entering these details:
    - App Long Name and Description
    - Your Company Name
    - Name and the Email Address of the developer in charge of the integration (as a point of contact)
13. Click **Continue** to move to the Features section where you can subscribe to the interested events to receive Webhook notifications for your app. For more information, see the section Enable Webhooks for Web Conference.
14. Click **Continue** again to move to the Scopes tab.

15. Click **Add Scopes** and select these two scope types and associated options:
    - **Meeting** - Select **View and manage all user meetings**
    - **Dashboard** - Select **View all users' meeting information on Dashboard**

    These two scope types are the extent of APIs that Oracles are allowed to use. Scopes provide a way to limit the amount of access that's granted to an app.
16. Click **Done** to complete the creation of your OAuth application in Zoom.

> **Note:** This OAuth application won't be published in the Zoom marketplace.

Enable Webhooks for Web Conference

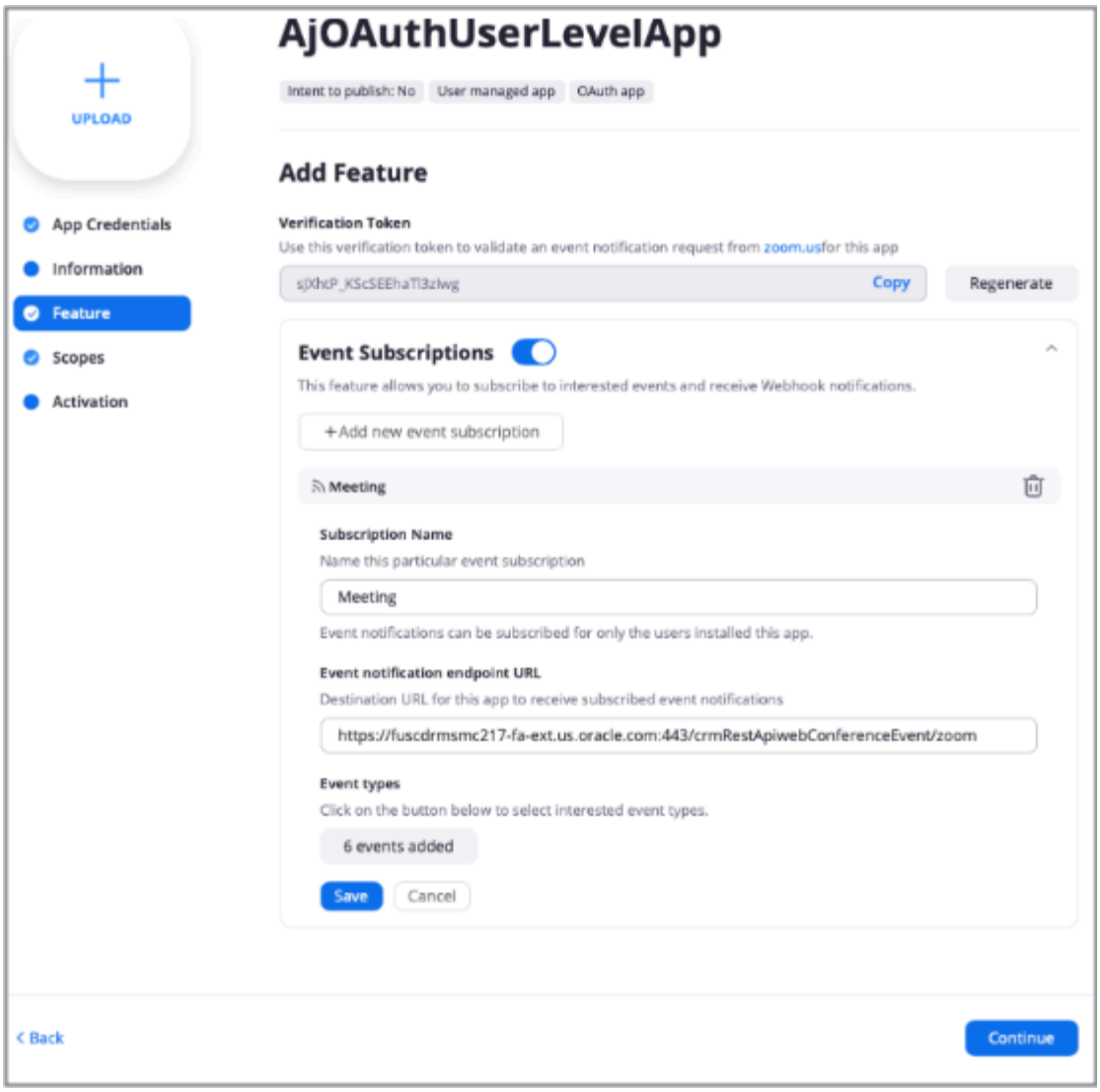
Webhooks act as a medium to notify consumer applications about events that occur in your web conference provider. For example, Zoom implements Webhooks or callbacks to notify clients about events such as when a:

- Meeting started or completed
- Participant joined or left the meeting
- Participant joined a meeting before the host
- Participant is waiting for host to start a meeting

Instead of making repeated calls to pull data frequently from an API, such as a Zoom account, Webhooks retrieve the required information about events that happen. The Zoom account must install your Webhook-enabled app to authorize data flow via Webhooks.

Here's how to enable Webhooks for an OAuth application in Zoom.

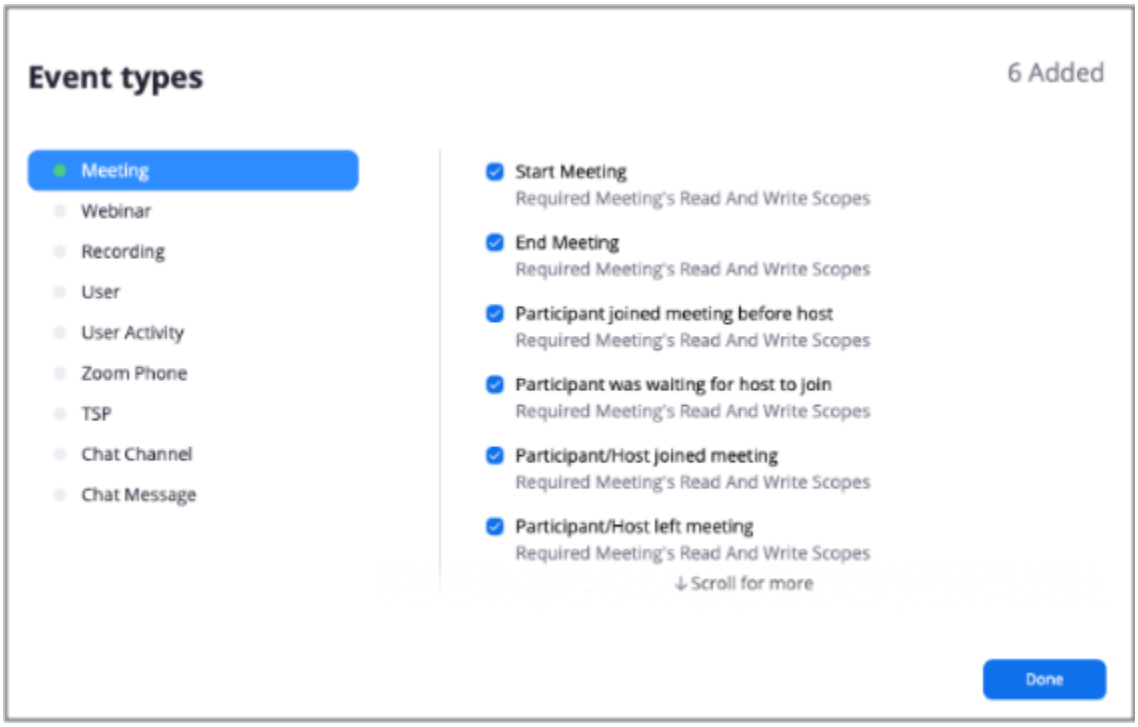
1. From the OAuth panel, click the **Feature** tab to display the **My Feature** page as follows:



2. Copy the **Verification Token** to validate an event notification request from Zoom.

> **Note:** This validation token is necessary to complete and activate the Zoom integration with your sales application. See the **Complete Your Web Conference Integration** section for more information.

3. Click **Event Subscriptions** and subscribe to the interested events to receive Webhook notifications for your app by entering these details:
    - Click **Add new event subscription** and select **Meeting**. Click the field again if you want to add additional Event Subscriptions.
    - Enter the **Subscription Name**.
    - Select the events from available **Event types** that you would like to subscribe as follows.



> **Note:** Although you can subscribe to as many events as required for each event subscription, you can only have a maximum of 10 event subscriptions per app.

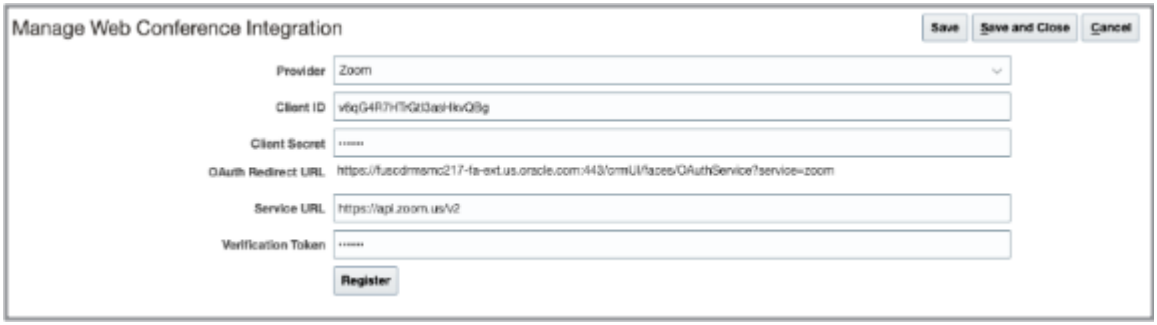
    - Enter a valid **Event Notification Endpoint URL** as shown in the following example: `https://<podhost>:<podport>/crmRestApi/webConferenceEvent/zoom`.

      This is the designated URL of your app where you receive Webhook POST requests, also known as event notifications. Event notifications are sent as HTTP POST requests in JSON to the endpoint you specify in your Marketplace app. This URL must be secured over HTTPS.
4. Click **Done** to complete the Webhook configuration of your OAuth application in Zoom.

Complete Your Web Conference Integration

You're now ready to complete and activate the Zoom web conference integration for your sales application. Follow these steps:

1. Navigate to **My Enterprise** > **Setup and Maintenance** > **Manage Web Conference Integration**. The following screen is displayed.



2. Enter the following:

Field	Value
Provider	Select Zoom from the drop-down list.
Client ID	Copy the value generated in the App Credentials section from the application created on Zoom marketplace. (See step 8 in the Create an OAuth Application in Zoom section).
Client Secret	Copy the value generated in the App Credentials section from the application created on Zoom marketplace. (See step 8 in the Create an OAuth Application in Zoom section).
OAuth Redirect URL	This pre-populated field defaults to the value you entered for the **Whitelist URL** in step 9 of the Create an OAuth Application in Zoom section. It contains your pod information in the following format: `https://[podhost:podport]/crmUI/faces/OAuthService?service=zoom`
Service URL	This pre-populated field defaults to the value you entered in step 9 of the Create an OAuth Application in Zoom section. To support GDPR requirements of EU customers, you can use this URL as the base URL for all API requests associated with EU accounts. `https://eu01api-www4local.zoom.us` For information about the Service URL, go to this URL `https://marketplace.zoom.us/docs/api-reference/introduction`

Field	Value
Verification Token	Copy the verification token value generated in the Add Feature section from the application created on Zoom marketplace. (See the section Enable Webhooks for Web Conference).

3. Click **Register** to initiate the OAuth process.

   A new window is displayed which requests your Zoom credentials.
4. Sign in with your Zoom account details and once you're successfully authenticated, you receive this message:

   `Congratulations. You have successfully registered your web conference provider.`

   > **Note:** Calls to Zoom will be made with these credentials. The email address for CX Sales resources will be used as the Zoom user ID.
5. Next, you're prompted to authorize the usages of the scopes you selected in step 15 in the Create an OAuth Application in Zoom section.
6. Return to the Manage Web Conference Integration page and click **Save and Close** to complete the registration.

Verify Your Setup

Here's how to verify your setup.

1. Sign in to your sales application.
2. Create an appointment of type **Web Conference**.
3. Check your Zoom web profile to verify the successful creation of your meeting in Zoom `(https://zoom.us/meeting#/upcoming)`

Remove a Web Conference

These steps describe how to remove a web conference integration from your sales application.

1. Sign in to CX Sales as a sales administrator.
2. Navigate to **My Enterprise** > **Setup and Maintenance**.
3. In the Setup and Maintenance work area, click the Tasks side panel icon and then click the Search link.
4. Search for and select the **Manage Web Conference Integration** task.
5. In the **Provider** field, remove the current value and leave blank.
6. Click **Save and Close**.

Enable Web Conferencing for Appointments

Enable web conferencing for appointments. This setup is required for Orchestration steps that allow salespeople to open Zoom with the click of the Start Web Conference button.

1. In Setup and Maintenance, open the task **Manage Activity Type and Subtype**:
   - Offering: Sales
   - Functional Area: Sales Foundation

- Show: All Tasks
- Task: Manage Activity Type and Subtype

2. For the **Web conference** (WEB_CONFERENCE) entry, select the **Appointments** check box.
3. Enter a start date.
4. Click **Save and Close**.

42 Sales Assistant

Overview of Sales Assistant

Sales Assistant is a chatbot that you can use to access sales information and perform sales activities. You enter questions or commands, and the Sales Assistant retrieves the information or acts on your requests. The Sales Assistant reduces manual data entry, and makes it easier to view and update sales records through text in Microsoft Teams and through either text or voice in CX Sales Mobile.

Things to note:

- **Supported Channels:** Microsoft Teams, CX Sales Mobile
- **Supported Language:** English
- **Supported Objects:** Accounts, Appointment, Contacts, Opportunities, Service Requests, Tasks, Sales Leads, and Custom objects

  Administrators can enable or disable different objects for each channel.
- **Security:** When using Oracle Sales Assistant in Microsoft Teams, you're prompted to sign in to CX Sales via a sign-in button the assistant sends to you when you first converse with it. After you sign in, the assistant continues the conversation with you.

  To use Oracle Sales Assistant in CX Sales Mobile, you can use the chatbot right away after you sign in to Oracle CX Sales Mobile.

  For any channels, the same functional privilege you have in CX Sales applies when entering into conversations with the Sales Assistant.

Where to Get Help with Sales Assistant Setup

If you need help with enabling Oracle Sales Assistant, send a message to the Sales Assistant forum on Oracle Cloud Customer Connect. Here's the URL:

`https://cloudcustomerconnect.oracle.com/resources/dee2ff3bf7/summary`

Related Topics

- Overview of Sales Assistant Setup
- Set Up Oracle Sales Assistant for Microsoft Teams
- Set Up Oracle Sales Assistant for CX Sales Mobile

Overview of Sales Assistant Setup

Because Oracle Sales Assistant setup is different for each of the channels it's running in, this chapter is divided into different sections for each channel.

Step	Setup Task	Application	Description	Where to get more details
1	You must have completed the prerequisite Oracle Digital Assistant application setup.	Oracle Identity Cloud Service (IDCS)	Before you set up any of the features that use natural-language processing, you must perform some prerequisite setup of Oracle Digital Assistant: • Set up administrator users • Obtain the ODA URL • Install (pull) the FADigitalAssistant. • Enable the Digital Assistant used for Oracle Fusion Cloud Applications If you already completed the setup for another feature, you can skip this step.	See the topic: *Overview of Common ODA Setup for Sales*. For additional information, see the Oracle Digital Assistant documentation: *Getting Started with Oracle Digital Assistant for Cloud Applications.*
2	Check Adaptive Search setup.	CX Sales	You must check that Adaptive Search is set up and the correct fields are enabled for Opportunity and Activity objects. • Opportunity: Status, Sales Method • Activity: Type, Activity, Start Date, End Date, Status, Due Date	*Prerequisite Adaptive Search Setup in Sales*
3	Configure the integration with Microsoft Teams	Microsoft Teams Developer Portal and Oracle Digital Assistant	For Oracle Sales Assistant for Microsoft Teams, involves creating an app in the Microsoft Teams Development Portal and a Microsoft Teams channel in Oracle Digital Assistant.	See *Set Up Oracle Sales Assistant for Microsoft Teams* for more information.
4	Configure the integration with CX Sales Mobile	Oracle Digital Assistant and Application Composer	For Oracle Sales Assistant for CX Sales Mobile, you configure an Oracle Web Channel and hook it up to CX Sales Mobile using Application Composer.	See *Enable Sales Assistant for CX Sales Mobile* for more information.
5	Use the Common Configuration Tool to Update Synonyms	Application Composer	The Oracle Sales Assistant Common Configurations administrator tool provides an easy way for you to manage synonyms for all supported channels without having to manually manage them in Oracle Digital Assistant.	See the topic *Use the Common Configuration Tool to Update Synonyms* of the Common Configurations section for more information about adding synonyms to fields and objects (if required).

Step	Setup Task	Application	Description	Where to get more details
6	Periodically update the FADigitalAssistant skill	Oracle Digital Assistant	The CX Sales skill is updated every release and three times within each release. You should periodically update to the latest version.	See the topic: *Refresh the Digital Assistants*

Prerequisite Adaptive Search Setup in Sales

Oracle Sales Assistant uses enabled saved searches and the high-performance search capabilities powered by Adaptive Search. Before using the Oracle Sales Assistant, you must ensure that:

1. Adaptive Search is enabled in the CX Sales application, and that search indexing processes are run and regularly scheduled.
2. Fields are enabled in Adaptive search for these objects:
    - Opportunity - Status, Sales Method
    - Activity - Type, Activity, Start Date, End Date, Status, Due Date

    See *Make Additional Fields Searchable*, *Overview of Optional Setup Tasks* and the *Implementation Reference* guide.

Validate Oracle Sales Assistant Configurations Using the System Status Tool

Use the system status tool to check if you are missing information or if you have entered incorrect data for your CX Sales Mobile and Oracle Sales Assistant configurations.

The system status tool is available from both within and outside a sandbox environment. For example, if you access the tool inside a sandbox, it checks the objects configured in the sandbox. Alternatively, if you are using the tool from outside the sandbox, it checks the objects against published configurations.

Previously, you needed to be inside a sandbox to configure the channels, but now you can configure channels for Oracle Sales Assistant outside a sandbox. This topic explains how to use the system status tool to determine if the setup for Oracle Sales Assistant is complete and ready to use from outside a sandbox.

The system status tool helps determine whether Oracle Sales Assistant is setup correctly. It also checks whether all aspects, such as REST APIs, are working as required for the sales assistant to function.

Navigate to the System Status Tool from Outside a Sandbox

Here's how to access the system status tool from outside a sandbox environment.

1. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
2. Under the Common Setup Menu, click **Productivity Applications Configuration**.
3. Click the **Oracle Sales Assistant** tab to enter your channels configuration.

   > **Note:** Click the **CX Sales Mobile** tab to open the System Status tool and view the current status of the CX Sales Mobile configuration.

4. Click **Save Configuration** and the system status page is displayed showing the current status of your channel configurations.

Navigate to the System Status Tool within a Sandbox

Here's how to access the system status tool from inside a sandbox environment.

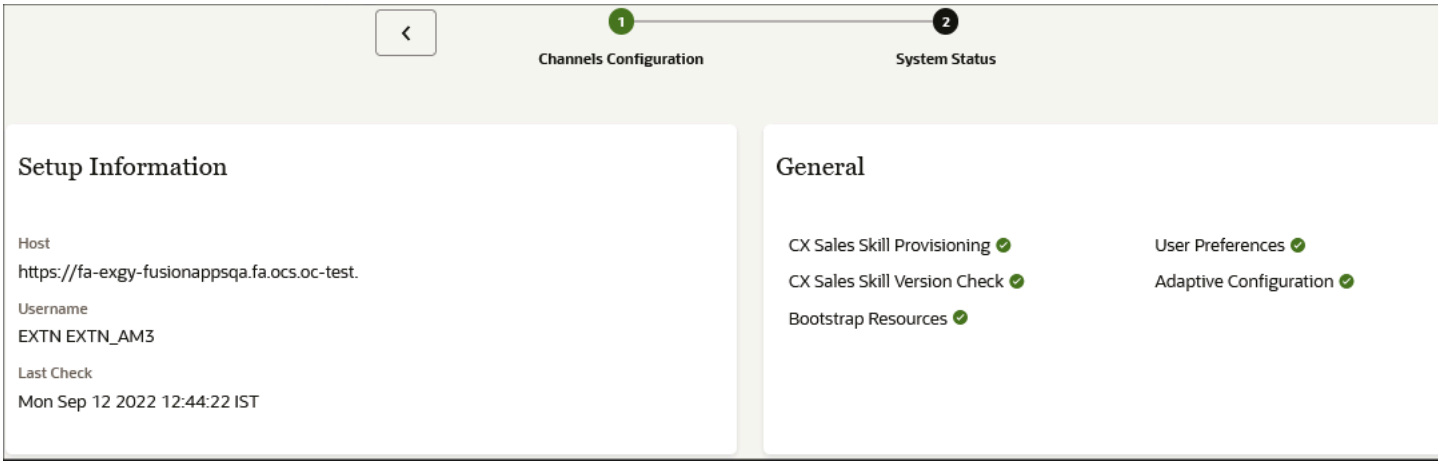
1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Select or create a sandbox that you want to use for your configurations. Make sure that your sandbox includes Application Composer as an active tool.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
5. Click the **System Status** tab to open the system status tool.

Check the System Status of Your Configuration

The system status page contains a summary of the setup information such as host, user name, and the time and date of the last system check. The results section displays the status of the requests that were checked and you can filter by all requests or view only request that failed.

To check the status of your Oracle Sales Assistant:

1. From the Channels Configuration page, click **System Status**.



2. View the **Setup Information** section as follows:
   - Host

- Username
- Last Check

3. Check the **General** section which displays the summary status of the following general items for the sales assistant setup. Note that general checks aren't related to specific objects.
   - CX Sales Skill Provisioning

     Checks if the provisioning is correct for the environment by invoking the list skill API. An error indicates that there's an issue with the Oracle Digital Assistant provisioning and you must raise a service request (SR) with the support team.
   - CX Sales Skill Version Check

     Checks the Sales skill version. The Oracle Digital Assistant list skill API only returns skills whose skill versions match FA version, which can be used for this validation. If the list returned is empty, then this checks to see if there is any available valid skill.
   - Bootstrap Resources

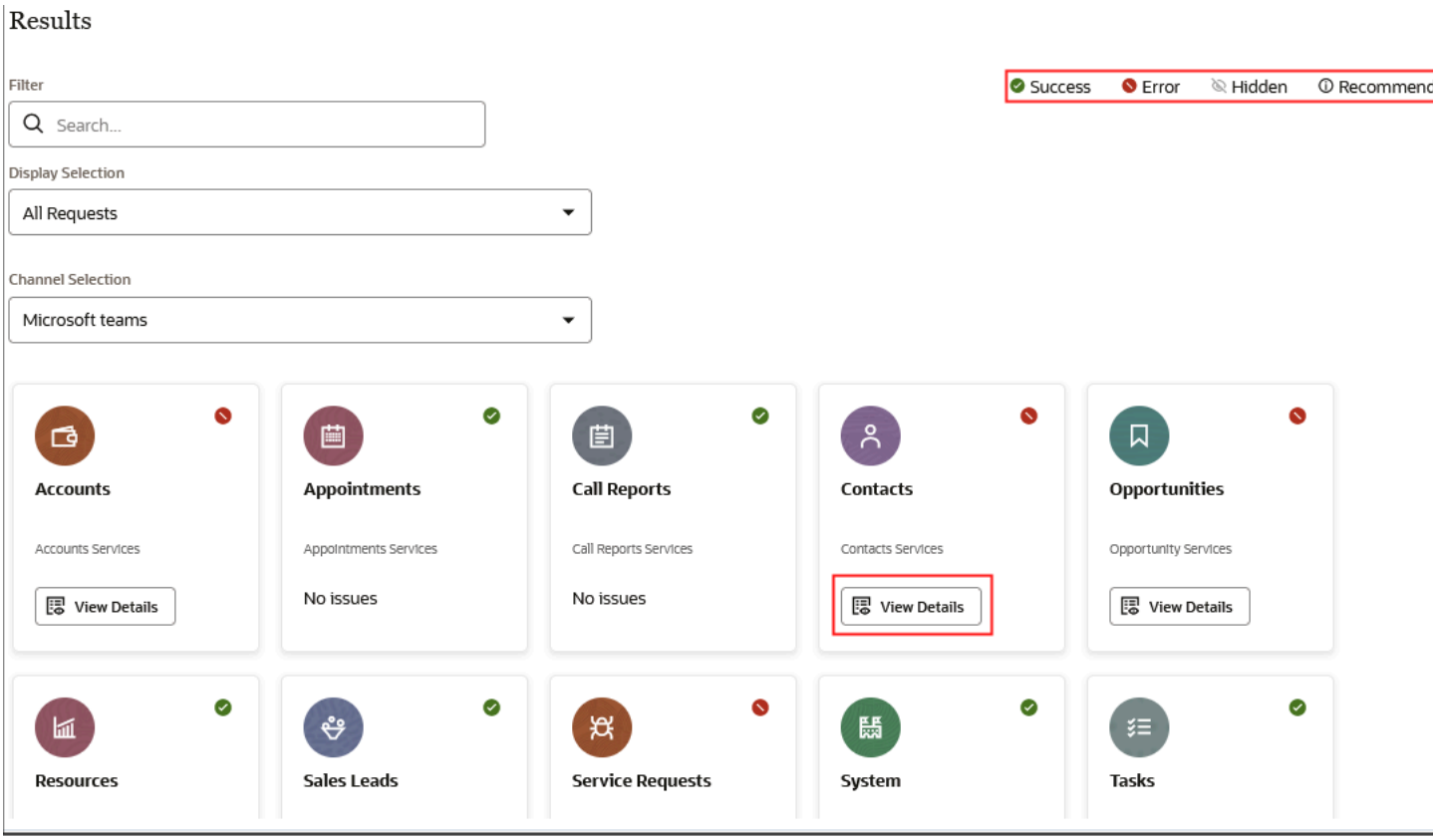
     Checks if REST APIs are working successfully in your environment.
   - User Preferences

     Checks if user preference values such as user display name, region, date format and so on can be successfully retrieved.
   - Adaptive Configuration

     Checks if the Adaptive Search REST API is working successfully and is able to retrieve the available list of objects which are indexed for Adaptive Search.
4. Click **Channel Selection** to filter objects based on the channel selected.

5. View the status results from the Results section to view checks for the configured objects.

> **Note:** If you are using the system status tool from inside a sandbox, it checks the objects configured in the sandbox. If you accessed the tool from outside a sandbox, then checks are performed on those published configurations.

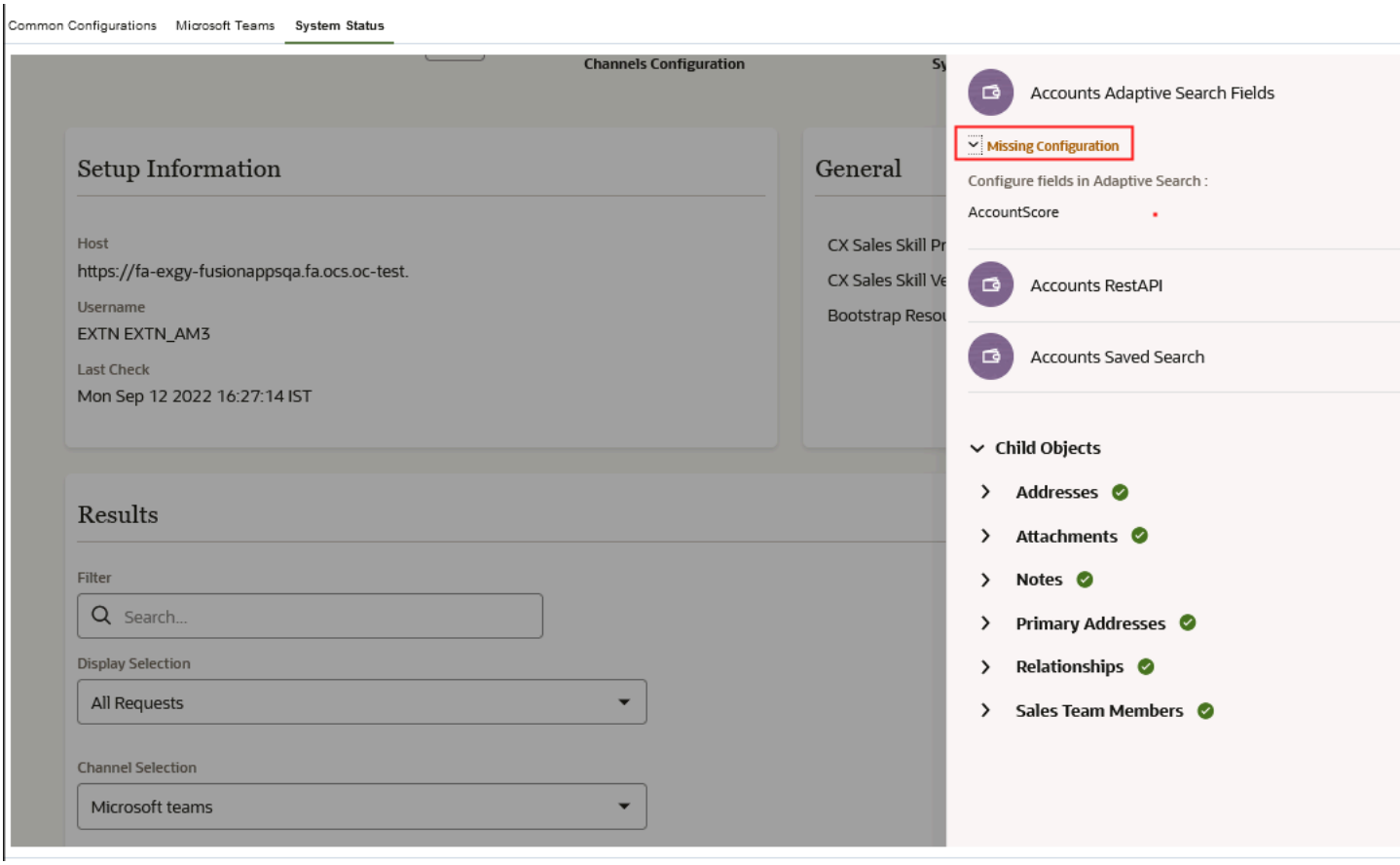


6. Click **View Details** to display a drawer with additional information for a request that has an error status.

> **Note:** If an object has any issue, then the **View Details** is displayed. If the object has no issues, then **No Issues** is displayed.

Here are a few examples of some checks that the system status tool performs. If there's an object that is enabled but does not have synonyms added to it, then an error will be displayed for the object. Also, if there are

fields that have synonyms but not enabled for Adaptive Search, then an error is displayed for the object. Here's a sample of the error details screen.



Any requests that aren't correctly configured are marked accordingly so you can easily tell what areas needs to be configured based on the status as follows:

Status	Description
Success	The Success icon means this item passes all validations and no issues are found.
Error	The Error icon means this item doesn't pass all validations. This can be caused by either the request to the server itself fails or some fields are configured incorrectly.
Hidden	The Hidden icon indicates that the request is hidden in the Navigator.
Recommended	The Recommended icon means this item is not configured as recommended. Although this doesn't affect the application's functionality, you should configure the item as suggested.

FAQs for Sales Assistant

Can I configure channels for Oracle Sales Assistant outside a sandbox?

Yes. You no longer need to create and publish a sandbox to configure channels for your sales assistant.

In addition, you can use the system status tool to help validate if the configurations for Oracle Sales Assistant are all completed and the assistant is ready to use.

Related Topics

- Validate Oracle Sales Assistant Configurations Using the System Status Tool

Microsoft Teams

Set Up Oracle Sales Assistant for Microsoft Teams

Enabling Oracle Sales Assistant in Microsoft Teams involves creating an app in the Microsoft Teams Development Portal and a channel in Oracle Digital Assistant.

1. Create an app using the Developer portal in Microsoft Teams, and add a bot to the app.

   Ensure that you set the following 2 options:
   - Under the Messaging bot section, select **My bot supports uploading and downloading files**
   - Under the Scope section, select **Personal**
   - > **Note:** You can create an app using many different ways as outlined in the Microsoft Teams chapter in the Using Oracle Digital Assistant guide.

2. Create a channel in Oracle Digital Assistant using the bot ID and password from the bot registration as follows:
    a. In a separate browser window or tab, open Oracle Digital Assistant, click Channels in the left menu, and choose Users.
    b. Click **+ Channel** to open the Create Channel dialog.
    c. Enter a name for your channel.
    d. Select **Microsoft Teams** as the channel type.
    e. Enter the **Microsoft Application Id** with the Microsoft Bot ID that you obtained when you created your bot registration in the Developer portal in Microsoft Teams.
    f. Enter the **Microsoft Application Password** with the client secret that you obtained from your bot registration.
    g. Click **Create.**
    h. From the Channels page, copy the WebHook URL and paste it somewhere convenient on your system.
    i. Click the **Route To** icon and from the drop down, select the Oracle Digital Assistant or skill that you want to associate with the channel.
    j. Select **Channel Enabled**.
3. Copy the WebHook URL that was generated when you created the channel and add it to the bot registration in Microsoft Teams.
4. Test your Oracle Digital Assistant through the Chat window in Microsoft Teams.

Overview of Extending Sales Assistant for Microsoft Teams

Microsoft Teams Composer is an easy-to-use interface designer tool in Application Composer that lets you configure the Oracle Sales Assistant chatbot for Microsoft Teams channel users. It helps you manage which objects and fields are visible in the chatbot.

You can create conditions to define when a page layout displays, without having to carry out specific configurations. You can add your own custom objects to the chatbot using Microsoft Teams Composer and add page layouts in the same way that you can with standard sales objects.

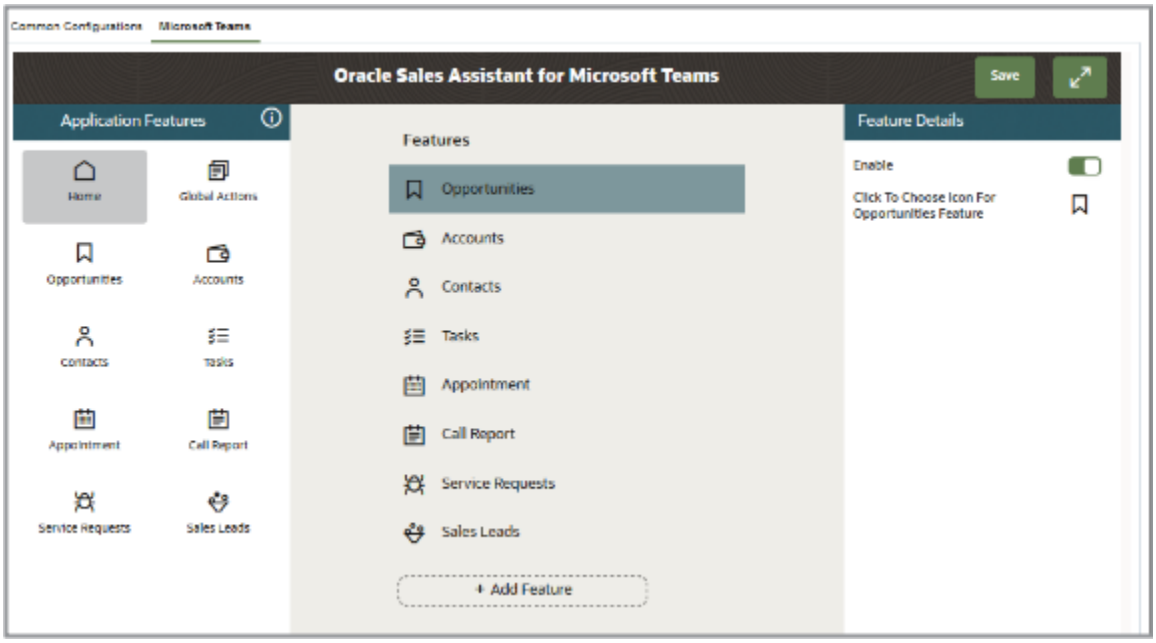
You can add a role to a chatbot feature's List, Summary, and Edit layout. For example, a user with the Sales Manager role might want to see certain fields on an opportunity record that other sales team members won't need. You can assign geographical regions to a page layout, which will restrict a page layout's availability to users from your selected set of geographical regions. For example, you might want to configure a summary layout based on the Sales Representative and Sales Manager roles, for Canada, based on an expression where the amount is less than $200,000 and the win probability is greater than 50%.

To use this feature, you must have Oracle Sales Assistant implemented for Microsoft Teams. You can enable or disable the objects available on the channel, which means that Microsoft Teams channel users of Sales Assistant can also view information about custom objects.

> **CAUTION:** You can only configure the latest skill from the skill store that matches your current release. For example, if the skill you want to modify is from a previous release and you're making your changes in a later release, then you must re-base the skill your users are using to the latest skill that was modified. In addition, you must re-route the channel to the new re-based skill so that users can start using it and perform Reset sessions in the channel UI.

> **Note:** If you need help with enabling Oracle Sales Assistant, send a message to the Sales Assistant forum on Oracle Cloud Customer Connect. Here's the URL: `https://cloudcustomerconnect.oracle.com/resources/dee2ff3bf7/summary`

Access the Microsoft Team Composer tool from the Oracle Sales Assistant Setup node under the Common Setup section of Application Composer.



Note: Oracle Sales Assistant for Microsoft Teams utilizes the saved searches enabled in Workspace and the high-performance search capabilities powered by Adaptive Search. See the Implementation Reference guide for more information about Adaptive Search and setting up Workspace saved searches.

Navigate to Microsoft Teams Composer

You can configure custom sales assistant layouts to display data by role, region, or other criteria for Microsoft Teams channel users. Using the Microsoft Teams Composer configuration tool, you can add, remove, and rearrange standard or custom fields to suit your business requirements.

Navigate to the Microsoft Teams Composer Tool

Here's how to navigate to Oracle Sales Assistant for Microsoft Teams.

1. Select or create a sandbox that you want to use for your configurations. Make sure that your sandbox includes Application Composer as an active tool.
2. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
3. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
4. Click the **Microsoft Teams Composer** tab to open the Oracle Sales Assistant for Microsoft Teams configuration tool.

On the left-hand side of the configuration tool, you can see the Application Features pane which lists the standard and custom objects that are enabled for Oracle Sales Assistant for Microsoft Teams in the current sandbox. The standard objects include:

- Accounts
- Appointment
- Call Report
- Contacts
- Opportunities
- Tasks
- Sales Leads
- Service Requests

When you click **Home** you have the option to enable or disable an object, or choose a different icon for an object.

The center pane lists the predefined objects or other objects that were added for Oracle Sales Assistant for Microsoft Teams. You can see at a glance those objects that are enabled and those objects that are deactivated are denoted by an icon. Scroll to the bottom of the page and you see the **+ Add Feature** button, which let's you add custom objects to Oracle Sales Assistant for Microsoft Teams.

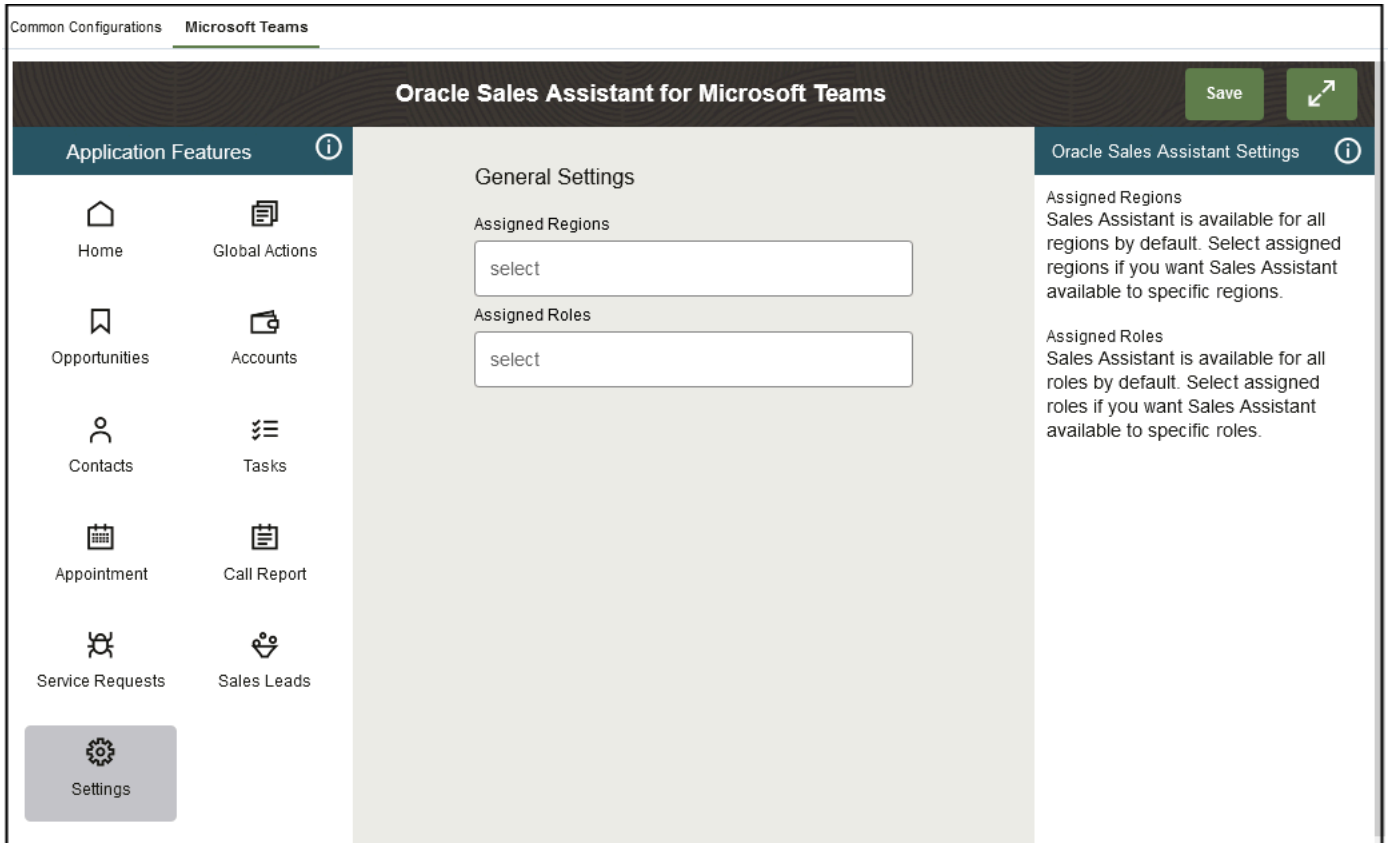
> **Note:** If you're adding a custom object, ensure that the **Include in Service Payload** option is enabled for an object in Application Composer. For details about how to do this, see the Add Objects and Fields chapter in the Configuring Applications Using Application Composer guide.

Assign Roles and Regions to Access Oracle Sales Assistant via Microsoft Teams

You can assign roles and regions to have access to CX Sales using Oracle Sales Assistant in Microsoft Teams. This gives you the flexibility to allow users with specific roles and in specific regions to have a conversation with the sales assistant.

If there are no roles and regions selected for the Assigned Roles and Assigned Regions fields, then Oracle Sales Assistant will be available to all Oracle Sales users.

1. Navigate to the Oracle Sales Assistant for Microsoft Teams configuration tool.



2. In the Application Feature pane, click **Settings**.
3. From the General Settings pane, select the regions you want from the Assigned Regions drop-down list.

   If you add two regions (region A and region B), the sales assistant will be available for users in region A or in region B.
4. Next, select the roles you want from the Assigned Roles drop-down list.

   If you add one role and one region, the sales assistant will be available for users with that role and in that region. However, if you add two roles and two regions, users with either one of the roles (role A or role B) in either one of the regions (region A or region B) can use the assistant.
5. Click **Save**.

Enable Attachments and Notes for Microsoft Teams

The Enable Attachments is selected by default and allows you to ask to view or upload attachments to your record. The Enable Notes is also selected by default and allows you ask to view or add notes.

For example, you can ask the assistant to attach a file to the object's records for those objects that have an attachment as a child object. When enabled, it will launch the attachment form for you to share notes, photos, videos, documents, or files from Oracle Sales Assistant for Microsoft Teams to CX Sales records.

You can also ask the assistant to add a note for any object that has notes as a child object. The assistant prompts you for the note details to add to the record you want.

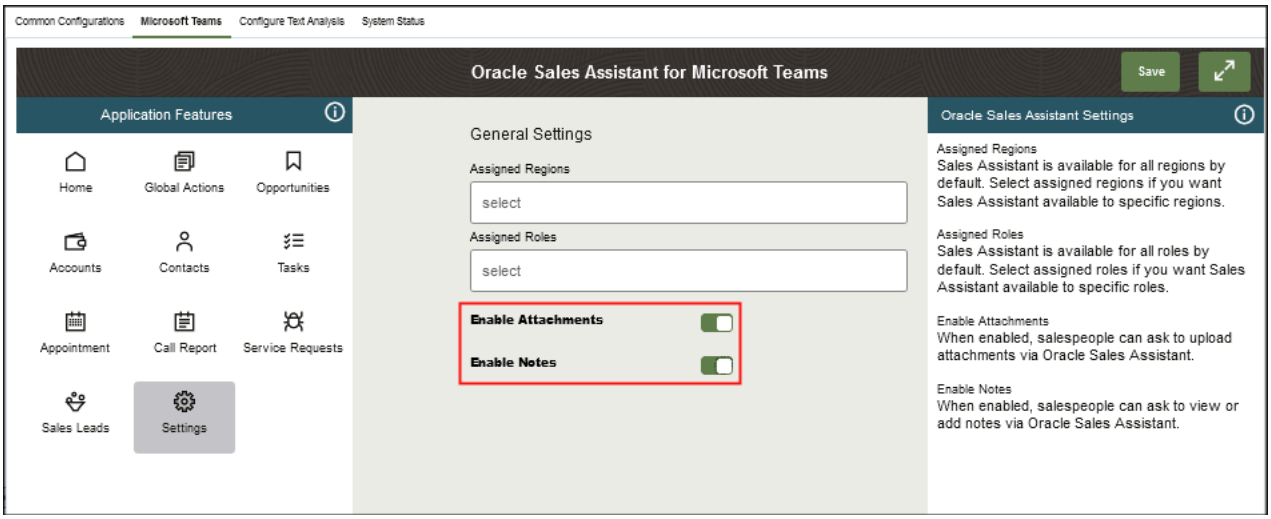
Here's how to enable attachments and notes from the Microsoft Team tool in Application Composer.

1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Create a new sandbox to use for your configurations.
3. Select **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click **Oracle Sales Assistant Setup**.
5. Click the **Microsoft Teams** tab.
6. In the Application Features pane, click **Settings**.
7. The **Enable Attachments** toggle is selected by default and allows you to ask to view or upload attachments to your record. The **Enable Notes** toggle is also selected by default and allows you ask to view or add notes.

   > **Note:** If you don't have access to attachments or notes in Oracle Sales, you won't be able add attachments or notes and won't be able to get any notes via Oracle Sales Assistant.

8. Click **Save**.

Here is a sample screenshot of the general settings highlighting the **Enable Attachments** and **Enable Notes** options.



About Page Layouts for Standard and Custom Objects

If you want to change the standard layout for an object for Oracle Sales Assistant for Microsoft Teams, you can create a new page layout and configure it to suit your company's requirements.

There are three different types of page layouts that you can create:

- List layout
- Summary layout
- Edit layout

Here are the basic configuration steps to make simple changes to Oracle Sales Assistant for Microsoft Teams layout pages:

1. In the Application Features pane, click the standard or custom object that you want to create a layout for.
2. Select the relevant type of page layout, such as the List, Summary or Edit.
3. In the Layouts pane, click the **Click to Clone** icon for the standard layout and enter a layout name.
4. Click **Ok**.
5. Change the fields that appear by clicking the relevant field and selecting a new field from the list.
6. You can remove fields by clicking the field and then clicking the cross icon.
7. To move a field, just drag it to the location where you want it to appear.
8. Click **Save** in the top right-hand corner of the Microsoft Teams Composer page.

   > **Tip:** Before saving, you can click the Preview tab to preview how the changes will display on Microsoft Teams.

9. Test and publish your new page layouts. See the Test Your Oracle Sales Assistant for Microsoft Teams topic for details about how to check your page layout configuration changes.

If you want to make more extensive changes to a page layout, familiarize yourself with the additional capabilities of the different types of page layout.

The List Page Layout

The List page layout displays a list of an object's records, with each record showing a set of fields that can be configured. Here are the points to note about configuring the List page layout:

- You can change the fields, remove fields, and move fields using the steps in the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic.
- The list layout contains 3 sections, Title, Contextual and Detail. In the Contextual and Detail sections, you can add up to five fields. Click on add field to select a field for the object. Once a field is added, click add field again to select another field and the pane shows two fields and a separator. You can rearrange the fields on each row by clicking and holding the field to move it to a new position.
- Roles and geographical regions can be assigned to List page layouts. These enable you to restrict who can view the page layout by their role and their geographical region. You can find more details about how to do this in the Define Criteria for a Feature's Page Layout topic.

Make sure that you click **Save** in the Microsoft Teams Composer tool page before creating another page layout.

Test and publish your new page layout. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your configuration.

The Summary Page Layout

The Summary page layout displays an object's details. There are six sections to the Summary layout consisting of a top section that provides the object's contact information and top-level information of your choice, information sections, and child and actions related object sections.

The sections of the summary layout are as follows:

- The top section is the Header section (fields are standard and you can't add additional fields to this section).
- The Information Section consists of one or many Info1 sections, owner and primary contact (you can rearrange the sections as required).
- Child object section (you can add child objects and rearrange child objects within the child objects section)

- Actions section (this is always placed at the end and depends on the selected object). Some objects have actions and some don't. All action show up as buttons on the card.

Here are the points to note about configuring the top section:

- You can change the fields, remove fields, and move fields using the steps in the Create Your Own Page Layout for a Feature topic.
- You can't move the top section, because this section is designed to contain the top-level information for the object.

Here are some points to note about the information section:

- Displays Info 1 section, Owner, and Primary contact sections. Note that not all objects has Owner and Primary Contact sections. For example, both Opportunity and Account objects have Primary Contact and Owner, the Contact object has Owner, and Service Request has Primary Contact.
- You can add as many Info 1 sections as required and each Info 1 section shows up as its own section. The section is named Info1 section because you can add 1 field per row.
- You can reorder any of the sections by using the blue up and down arrows.
- You can add fields by clicking the **+ Add Field** button at the bottom of each section. There's no limit as to the number of fields you can add.
- You can add Info 1, Owner, and Primary contact sections by clicking the **+ Add Section** button.
- You can change the fields, remove fields, and move fields using the steps in the Create Your Own Page Layout for a Feature topic.

The section for adding child and related objects is at the bottom of the Summary page layout. Child objects such as notes, attachments, or in the case of the Opportunity object, products, and competitors are supported only for the Summary layout. If the object has other related objects, those can't be added to the summary card.

- This section can't be moved, however you can add as many child and related objects as you require by clicking **+ Add Child**.
- When you add a child or related object, the child object section displays on the left pane of the summary card. Click the child object and the screen to modify the list view is displayed. Note that only the first two sections of the list card will be displayed on the summary card. The full list layout on the top level object's summary card isn't displayed. See the Child Object Page Layouts section of this topic for more information.

Other configuration options for the Summary page include:

- Assign roles and geographical regions to Summary page layouts. These enable you to restrict who can view the page layout by their role and their geographical region. You can also define a set of conditions that have to be met before the page layout is displayed. For example, if you create criteria as follows: `Win probability is Greater than 50%`, then any opportunities with a win probability greater than 50% will use your layout. You can find more details about how to set these up in the Define Criteria for a Feature's Page Layout topic.

Make sure that you click **Save** in the configuration tool page before creating another page layout.

Test and publish your new page layout. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your mobile configurations.

The Edit Page Layout

When you create an object using Oracle Sales Assistant (OSA), the default action is that the assistant only prompts for values of required fields that have no default values. Here are the points to note about configuring the Edit page layout:

- Edit page layouts is available for Task, Appointment, and Call Report objects only.
- You can change the fields, remove fields, and move fields using the steps in the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic of this chapter.
- The order of the questions asked during the create is based on the order of the fields in the edit layout. To move a field, just drag it to the location where you want it to appear.
- By default, when you create an object, the assistant only prompts for values of fields on the edit page layout that are required and have no defaults values. However, if you would like the assistant to prompt for additional fields that aren't mandatory, or mandatory and have a default, then you can select the fields in the "Prompted Fields on Assistant Create" section on the left hand side of the tool. Any fields selected in this section will always be prompted during conversational create if the field is part of the edit layout. The fields selected in this section applies to the predefined standard or custom layouts.
- You can also assign roles and geographical regions. These enable you to restrict who can view the page layout by their role and their geographical region. You can also define a set of conditions that have to be met before the page layout is displayed. For example, if you create criteria as follows: `Win probability is Greater than 50%`, then any opportunities with a win probability greater than 50% will use your layout. You can find more details about how to set these up in the Define Criteria for a Feature's Page Layout topic.

Make sure that you click **Save** in the configuration tool page before creating another page layout.

Test and publish your new page layout. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your mobile configurations.

Child Object Page Layouts

You can only add child objects to the Summary page layouts, but you can also create page layouts for the child objects themselves.

Here are points to note when configuring page layouts for child objects:

- Note and Attachments are special child objects that can't be extended or modified.
- Only predefined child objects layouts are displayed under the Child object section.
- When you add a child object to a parent object's page layout, the child object is added to the Children pane. To create a page layout for the child object, click the child object and clone the standard page layout, as you would for the parent object.
- Configuring a child object page layout is the same as configuring a parent object's page layout, so you can follow the same steps you're already familiar with in this topic.
- The template that's used for the list view for top level objects page layout is selected when you add the child object to a parent page. You can then further configure the List page when you select the child object and clone the standard page layout.
- You can assign roles and geographical regions to child object page layouts. You can also assign criteria for displaying the list page layout. Child object layouts only supports list layouts for now and advanced criteria isn't supported for list layouts.

Ensure that you test and publish your new page layouts. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your configuration.

About Page Layouts for Global Actions

You can create Sales Briefing layouts for specific roles, including custom roles, by either hiding or displaying the information related to pipeline, tasks or appointments for the particular role.

This can be particularly useful for sales managers who don't have a pipeline and so don't want to see blank pipeline information on their home page. You can also define the definition of pipeline based on Workspace saved searches.

Here's how you configure the Sales Briefing response:

1. In the Application Features pane, click **Global Actions**.
2. In the Layouts pane, click the **Click to Clone** icon to create a new Sales Briefing layout.
3. Enter a layout name and click **Ok**.

   All the Sales Briefing information is displayed by default. You can hide specific information from the Edit Layouts pane by clicking the **Show** icon to enable or disable the information on the card.

   You can also add a saved search to the pipeline card by clicking the Actions menu (3 horizontal dots icon) beside the pipeline row.

   > **Tip:** If you want to assign a role to your Sales Briefing layout, add the role in the Assigned Roles pane.

4. Click **Save**.
5. Test and publish your new page layouts.

See the "Test Your Oracle Sales Assistant for Microsoft Teams" topic for details about how to check your page layout configuration changes.

Create Your Own Page Layout for a Feature Using Microsoft Teams Composer

This procedure shows you how to create a Summary page layout for an Oracle Sales Assistant for Microsoft Teams feature but you can also use this procedure to help create List and Edit page layouts as well.

Creating your own layout enables you to select the fields your users will see for a feature's view using Microsoft Teams.

> **Tip:** You can also specify which user roles can view a particular layout, create criteria that have to be met to display the layout, and specify which geographical regions can view the layout.

1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
5. Click the **Microsoft Teams Composer** tab to open the Oracle Sales Assistant for Microsoft Teams configuration tool.
6. In the **Application Feature** pane, click the feature that you want to create a layout for.
7. Select the relevant type of page view, such as the summary, list, or edit view.
8. In the Layout pane, click the **Click to Clone** icon for the Standard layout and enter a layout name.

9. Click **Ok**.
10. Select the **Active** tick icon if it's not already selected.
11. In the **Edit Layout** pane add fields to the Summary layout page, for example, by clicking **+ Add Field** in the **Info 1 Section**.
12. Select the field that you want to add to the Summary layout and then select a label, if one exists.

    > **Note:** You can remove fields by clicking the field you want to delete and then click the cross icon.

13. You can move fields by clicking the field and moving it to your preferred location.
14. For the Summary layout, click the **+ Add Action** and select which user actions you want to display or hide using the toggle buttons.
15. Click **Save** in the Microsoft Teams Composer page.
16. Test and publish your new page layouts. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your configurations.

Assign Roles to Page Layouts

You can add a role to an Oracle Sales Assistant for Microsoft Teams page layout. You can also add a role to an application feature's relevant type of page view, such as the summary, list or edit view.

For example, a user with the Sales Manager role might want to see certain fields on an opportunity record that other sales team members won't need.

> **Note:** You can assign a role when you create a custom object layout. For example, you can also assign advanced criteria for custom object summary layouts. Custom features are created when you create a custom object in Application Composer, and they're selected from the Available Features pane.

Here are the steps to assign a role to an Opportunity Summary layout using Microsoft Teams Composer and display the new layout in the Oracle Sales Assistant for Microsoft Teams application.

1. Navigate to the Oracle Sales Assistant for Microsoft Teams configuration tool.
2. In the Application Feature pane, click the feature that contains the page layout that you want to add roles to. In this example, expand the Opportunities subheader.
3. Select the relevant type of page view, such as the summary, list or edit view. In this example, select the Summary view.
4. In the Layouts pane, select the relevant page layout, or create a new page layout (see the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic for details about how to create a page layout).
5. Expand the **Assigned Roles** pane, and select the roles you want to add.

    > **Note:** You can remove a role by clicking the Remove (X) icon.

6. Click **Save**.
7. Check that your changes appear in your CX sales application. Sign in as a Oracle Sales Assistant for Microsoft Teams user and view your changes by sending "refresh metadata". Then send the utterance to get the record for the layout. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your changes.
8. When you're happy with your changes, publish your sandbox to distribute your configurations to all Oracle Sales Assistant for Microsoft Teams users.

Related Topics

- Create Your Own Page Layout for a Feature Using Microsoft Teams Composer
- Test Your Oracle Sales Assistant for Microsoft Teams Configuration

Assign Regions to Page Layouts

Adding geographical regions to a feature's layout enables you to restrict its availability to users from a selected set of geographical regions.

For example, if you add the United States and United Kingdom regions to a page layout, then only users from these countries can view the page layout. You can assign a region when you create a custom object layout.

Here are the steps to assign a geographical region to an Opportunity Summary layout using Microsoft Teams Composer and display the new layout in the Oracle Sales Assistant for Microsoft Teams application.

1. Navigate to the Oracle Sales Assistant for Microsoft Teams configuration tool.
2. In the Application Feature pane, click the feature that contains the page layout that you want to add regions to. In this example, expand the Opportunities subheader.
3. Select the relevant type of page view, such as the summary, list, or edit view. In this example, select the Summary view.
4. In the Layouts pane, select the relevant page layout, or create a new page layout (see the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic for details about how to create a page layout).
5. Expand the **Assigned Regions** pane, and select the regions you want to add.

   > **Note:** Select as many regions as you require. You can remove a region by clicking the Remove (X) icon.

6. Click **Save**.
7. Check that your changes appear in your CX sales application. Sign in as a Oracle Sales Assistant for Microsoft Teams user and view your changes by sending "refresh metadata". Then send the utterance to get the record for the layout. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your changes.
8. When you're happy with your changes, publish your sandbox to distribute your configurations to all Oracle Sales Assistant for Microsoft Teams users.

Related Topics

- Create Your Own Page Layout for a Feature Using Microsoft Teams Composer
- Test Your Oracle Sales Assistant for Microsoft Teams Configuration

Define Criteria for a Feature's Page Layout

Creating criteria enables you to define a set of conditions that have to be met before the page layout is displayed for a feature's Summary views.

For example, if you create criteria for an Opportunity Summary layout as follows: `Win probability is Greater than 50%`, then any opportunities with a win probability greater than 50% will use your layout in the Summary view.

> **Note:** You can't create criteria for a feature's List view.

This procedure shows you how to create criteria for an Oracle Sales Assistant for Microsoft Teams feature's page layout.

1. Navigate to the Oracle Sales Assistant for Microsoft Teams configuration tool.
2. In the Application Feature pane, click the feature that contains the page layout that you want to add roles to. In this example, expand Opportunities.
3. Select the relevant type of page view, such as the summary or edit view. In this example, select the Summary view.
4. In the Layouts pane, select the relevant page layout, or create a new page layout (see the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic for details about how to create a page layout).
5. In the Advance Criteria pane, click **Add**.
6. Create your criterion by selecting a field, operator, and then entering the relevant field value.

   > **Note:** You can't select a field value from a list of values, so enter the field value.

7. To add a conditional statement click **Add** and select **AND** or **OR**. Enter the field, operator, and relevant field value.
8. Click **Save**.
9. Check that your changes appear in the CX Sales application. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your changes.
10. When you're happy with your changes, publish your sandbox to distribute your configurations to all Oracle Sales Assistant for Microsoft Teams users.

Related Topics

- Create Your Own Page Layout for a Feature Using Microsoft Teams Composer
- Test Your Oracle Sales Assistant for Microsoft Teams Configuration

Add Custom Objects to Page Layouts

You can add a custom object to your Oracle Sales Assistant for Microsoft Teams chatbot.

Sales objects are also known as features in Sales Assistant for Microsoft Teams. When you create a custom Sales object in Application Composer a corresponding feature is also created in Sales Assistant for Microsoft Teams. Custom features can be found in the Application Features pane in the Microsoft Teams Composer page.

Here's how you add a custom object, or feature to your Oracle Sales Assistant for Microsoft Teams using Microsoft Teams Composer.

1. Sign in to the Oracle CX Sales application as user with a Sales Administrator role.
2. Select the sandbox you want use for your configuration.
3. Open Application Composer by selecting Application Composer under the Configuration category in the Navigator menu.
4. Select the **Sales** application and find the custom object you want to add to Oracle Sales Assistant for Microsoft Teams.
5. Expand the object's menu and click **Fields**.
6. Select the field you want to add to Oracle Sales Assistant for Microsoft Teams.
7. In the Constraints section, enable the **Include in Service Payload** option.
8. Click **Save and Close**.
9. Repeat steps 6 to 8 for each field that you want to add to the application.
10. Next, under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
11. Click the **Microsoft Teams Composer** tab to open the Oracle Sales Assistant for Microsoft Teams configuration tool.

12. In the Features pane, click the **+ Add Feature** and search for the custom object you previously created in Application Composer.
13. Click the custom object (otherwise known as a feature) that you want to add.
14. Choose an icon from the list to display for the selected custom feature.
15. Click **Next** and a preview of the List and Summary views that will be created are displayed for the selected custom feature.
16. Click **Ok** and add the custom object to the Features pane.
17. If you want to add custom layouts to the List or Summary views, see the Create Your Own Page Layout for a Feature Using Microsoft Teams Composer topic for more details.
18. When you have finished adding the custom feature, click **Save** in the top right-hand side of the Microsoft Teams Composer page.
19. Next, use the Common Configuration tool to define the synonyms for the newly enabled custom object. See the Common Configurations section for more details.
20. Test and publish your new features. See the Test Your Oracle Sales Assistant for Microsoft Teams Configuration topic for details about how to check your changes.

Test Your Oracle Sales Assistant for Microsoft Teams Configuration

After you have configured Oracle Sales Assistant for Microsoft Teams using Microsoft Teams Composer, you should test your configuration before distributing the changes to your users.

Task Summary

To test your configurations, complete these tasks:

1. Download the configuration changes from the sandbox and verify them.
2. Publish the sandbox.

Download Configuration Changes From the Sandbox

Here's how:

1. After making changes to your configuration, keep the Oracle CX Sales application open (signed in with a Sales Administrator or Sales Implementor role). Make sure that the sandbox where you made the changes is active in the application.
2. Sign in as a Oracle Sales Assistant for Microsoft Teams user that will be able to view your configuration changes. For example, if the changes have been made to a layout with an assigned role, then you'll need to sign in as a user with the required role permissions to view the changes.
3. Check your configurations by sending "refresh metadata". Then send the utterance to get the record for the layout.

Publish the Sandbox

Once you're ok with your configurations, publish the sandbox. Here's how:

1. Sign in to Oracle CX Sales as the same user you used to make the configuration changes.
2. Publish your sandbox to distribute your changes to all Oracle Sales Assistant for Microsoft Teams users.
3. Send "refresh metadata" one more time so all users receive the changes you made to your configurations.

Note: You can configure only the latest skill from the skill store that matches your current release. For example, if the skill you want to modify is from a previous release and you're making your changes in a later release, then you must re-base the skill your users are using to the latest skill that was modified. In addition, you must re-route the channel to the new re-based skill so that users can start using it and perform Reset sessions in the channel UI.

Configure Microsoft Teams with Custom Scripts

You can configure Microsoft Teams to match your business requirements by writing custom scripts using JavaScript that enforce validations and rules.

You can create scripts for Microsoft Teams using the CX Sales Mobile script tools. You can also assign scripts for CX Sales Mobile to Microsoft Teams if the requirements for both channels are the same. You can add custom scripts for Microsoft Teams to Appointments, Call Reports, and Tasks for On Create, Before Save, and After Save events.

Note: To enable the custom scripts for Microsoft Teams feature, you must first create an Enable Custom Scripts for Microsoft Teams (CDA_ENABLE_CSS_TEAMS) profile option, and then set the option value to Yes. For more information, see *Enable Custom Scripts for Microsoft Teams Profile Option*.

Create a Script and Assign to Microsoft Teams

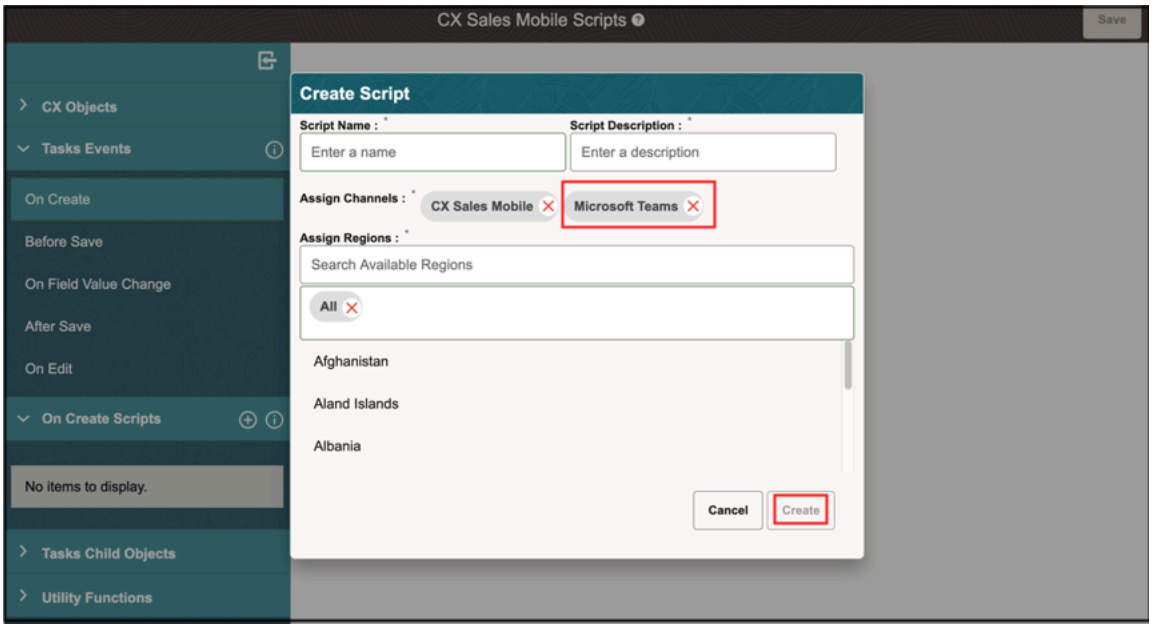
Here's how you create a script and assign to Microsoft Teams:

1. Select the sandbox you want use for your configuration.
2. Select **Navigator** > **Application Composer** > **Mobile Application Setup**.
3. Click the **CX Sales Mobile Scripts** tab at the top of the **Mobile Application Setup** page.
4. To create a script for a top-level parent object, select the object you want to write a script for, and then select the event that will trigger your script. You can choose one of these events:
    - On Create (triggered when a new record is created in the mobile app).
    - Before Save (triggered before a record is saved).
    - After Save (triggered after the app has saved the record).
5. Click the plus icon in the **<Event Name> Scripts** section.
6. Enter the script name and description.
7. (Optional) If you want the script to work for particular regions, select geographical regions for the script. The script will work for users who have your selected regions as their country preference setting in the CX Sales app.

    Note: A script can have multiple regions associated to it, but the same region can't be assigned to more than one active script for the same object and event.

    If you want to restrict your script to trigger for certain user roles, you will need to specify these by writing a JavaScript script

8. Select **Microsoft Teams** as your assigned channel and click **Create** to create your script.



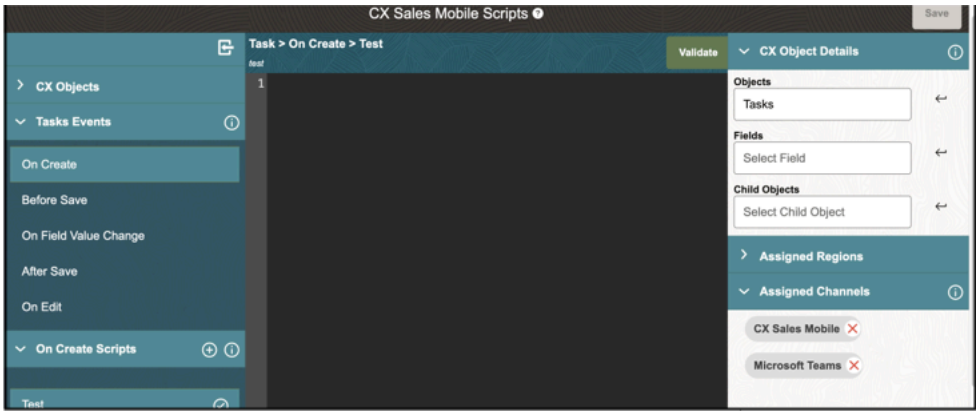
9. Click **Validate** to check whether your script has any errors. The validation checks include checks for nested functional calls and anything else in the script that will cause it to run forever in an infinite loop.
10. When you're finished, click **Save**.

Assign Existing Scripts to Microsoft Teams

You can also assign existing scripts for CX Sales Mobile to Microsoft Teams if the requirements for both channels are the same.

Here's how you add an existing script and assign to Microsoft Teams.

1. Select the sandbox you want use for your configuration.
2. Select **Navigator** > **Application Composer** > **Mobile Application Setup**.
3. Click the **CX Sales Mobile Scripts** tab at the top of the **Mobile Application Setup** page.
4. Choose the event and locate the existing script that you want to assign to Microsoft Teams.
5. Select **Microsoft Teams** as your assigned channel.



6. Click **Validate** to check whether your script has any errors. The validation checks include checks for nested functional calls and anything else in the script that will cause it to run forever in an infinite loop.
7. When you're finished, click **Save**.

Enable Custom Scripts for Microsoft Teams Profile Option

You can add custom scripts for Microsoft Teams to Appointments, Call Reports, and Tasks for On Create, Before Save, and After Save events. For example, you can trigger a script to validate or enforce some rules before or after a call report is saved.

To enable the custom scripts for Microsoft Teams feature, you must first create an Enable Custom Scripts for Microsoft Teams (CDA_ENABLE_CSS_TEAMS) profile option, and then set the option value to Yes.

Here's how to edit the CDA_ENABLE_CSS_TEAMS profile option:

1. Sign in as a user with access to the setup areas.
2. Navigate to **Setup and Maintenance** work area.
3. Open the Tasks side panel and click **Search**.
4. Search and select the Manage Profile Options task.
5. From the Manage Profile Options page, click **Actions** > **New** .
6. Enter all the fields with relevant details with specific attention to the following:
    - Profile Option Code = CDA_ENABLE_CSS_TEAMS
    - Profile Option Name = Enable Custom Scripts for Microsoft Teams
    - Application = Sales Assistant
    - Module = Sales Assistant (Module Type = LBA)
    - Start Date = Date that the option should start to be enabled
7. Click **Save and Close**.
8. For the Site Profile Option Levels, select the Enabled and Updatable check boxes to enable.
9. Click **Save and Close**.
10. In the Setup and Maintenance work area, open the Manage Administrator Profile Values task:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
11. In the Manage Administrator Profile Values page, search by the profile option code, CDA_ENABLE_CSS_TEAMS.
12. Click the profile option name link.
13. On the Profile Values section, click **Actions** > **New** .
14. Select Profile Level to Site and set Profile Value = Y.
15. Click **Save and Close**.

FAQs for Microsoft Teams

How can I hide or display a feature?

Navigate to the Microsoft Teams Composer in Application Composer. In the Application Feature pane, select the feature you want to hide or display, and click the Enable icon to enable or disable the feature in the Feature Details pane. Click Save.

Can I configure additional fields to prompt during a conversational create?

Yes, you can specify what fields you want the assistant to prompt in both the edit page layout sections for CX Sales Mobile and Microsoft Teams.

By default, when you create an object, the assistant only prompts for values of fields on the edit page layout that are required and have no defaults values.

However, if you would like the assistant to prompt for additional fields that aren't mandatory, or mandatory and have a default, then you can select the fields in the **Prompted Fields on Assistant Create** section on the left hand side of the Microsoft Teams and CX Sales Mobile configuration tools. Any fields selected in this section will always be prompted during conversational create if the field is part of the edit layout. The fields selected in this section also applies to the predefined standard or custom layouts.

For CX Sales Mobile, see *Configure the Edit Page Layout* for more information. For Microsoft Team, click the related link *About Page Layouts for Standard and Custom Objects*.

Related Topics

- About Page Layouts for Standard and Custom Objects
- Configure the Edit Page Layout

CX Sales Mobile

Set Up Oracle Sales Assistant for CX Sales Mobile

Oracle CX Sales Mobile is a specialized mobile application for CX Sales. Only the CX Sales skill (Oracle Sales Assistant) for CX Sales can be set up with CX Sales Mobile.

You create a channel in Oracle Digital Assistant and expose your Sales Assistant in Oracle CX Sales Mobile.

Set Up CX Sales Mobile

Once you have performed the steps to configure ODA and have access to start using Sales Assistant, you can configure the Oracle Web Channel to associate to the Sales assistant skill. Here's a table summarizing what you must do to set up CX Sales Mobile with the Oracle Sales Assistant. See the topic referenced in the last column for details about each setup step.

Step	Task	Description	Where to get more details
1	Complete the prerequisite Oracle Digital Assistant application setup.	Before you set up any of the features that use natural-language processing, you must perform some prerequisite setup of Oracle Digital Assistant:	See the topic: *Overview of Common ODA Setup for Sales*. For additional information, see the Oracle Digital Assistant documentation: *Getting Started*

Step	Task	Description	Where to get more details
		• Set up administrator users • Obtain the ODA URL • Enable the Digital Assistant used for Oracle Fusion Cloud Applications If you already completed the setup for another feature, you can skip this step.	*with Oracle Digital Assistant for Cloud Applications.*
2	Create a Channel in Digital Assistant.	Create an Oracle Web Channel in Oracle Digital Assistant.	See the section "Create a Channel in Digital Assistant" in the topic *Enable Sales Assistant for CX Sales Mobile* for more information.
3	Set up in CX Sales Mobile Composer tab in CX Sales Application Composer.	To enable Oracle Sales Assistant in CX Sales Mobile, enter the **Oracle Digital Assistant Host** and **Channel ID** of the Oracle Web channel registered in Oracle Digital Assistant.	See the section "Set the Digital Assistant Host and Channel ID" in the topic *Enable Sales Assistant for CX Sales Mobile* for more information.
4	Enable or Disable Sales Assistant for Standard or Custom Objects.	In the CX Sales Mobile configuration tool, select the standard or custom objects you would like to enable for sales assistant.	See the section "Enable or Disable Sales Assistant for Standard or Custom Objects" in the topic *Enable Sales Assistant for CX Sales Mobile* for more information.
5	Test Your Configurations.	After you have configured Oracle CX Sales Mobile using Application Composer, you should test your configurations before distributing them to your user's mobile devices.	See the topic *Test Your Configurations* of the Mobile Applications chapter of this guide.

Note: The CX Sales Mobile app uses saved searches and other work areas that are powered by the high-performance search capabilities of Adaptive Search. Prior to using the CX Sales Mobile application, check that Adaptive Search is deployed in the CX Sales application, and that search indexing processes are run and regularly scheduled. You must also ensure that these fields are enabled for use as search filters for the following objects:

- Opportunity: - Status, Sales Method
- Activity: - Type, Activity, Start Date, End Date, Status, and Due Date

Enable Sales Assistant for CX Sales Mobile

Sales assistant is an individual chatbot that you can use to help you perform your daily sales-related tasks. Using your phone, you can ask questions or commands to the sales assistant and it retrieves the information, or acts on your requests. It reduces manual data entry, and makes it easier to view and update sales records through text or voice commands.

Follow the steps outlined in the following sections to enable sales assistant for your sales representatives.

Create a Channel in Oracle Digital Assistant

1. In a browser window, open ODA, click **Channels** in the left menu, and choose **Users**.
2. Click **+ Channel** to open the Create Channel dialog.
3. Give your channel a name.
4. Choose **Oracle Web** as the channel type.
5. Disable the **Client Authentication Enable** option using the toggle.
6. Enter an asterisk (*) for **Allowed Domains**.
7. Set the Session expiration time.
8. Click **Create**.
9. In the Channels page, copy the Channel ID and make a note of it.
10. Click **Route To** and select the Sales skill that you want to associate with the channel.
11. Switch on the Channel Enabled control.

Set the Digital Assistant Host and Channel ID

After you create the Oracle Web channel in Oracle Digital Assistant, configure Oracle Fusion Cloud Applications with the values from the web channel. You don't need to create and publish a sandbox to configure channels for your sales assistant.

Here's how to set the Digital Assistant host and channel ID to enable Oracle Sales Assistant in CX Sales Mobile.

1. Select Application Composer under the Configuration category in the Navigator menu.
2. Under the Common Setup Menu, click **Productivity Applications Configuration**.
3. Click the **Oracle Sales Assistant** tab to open the Channels Configurations page.
4. Navigate to the **Register the Oracle Digital Assistant Channels** section of the Channels Configurations page.
5. Enter the following host and channel ID details:
    - In **Oracle Digital Assistant Host**, enter the Oracle Digital Assistant Instance URL without https://
      See the topic: *Obtain the Oracle Digital Assistant URL*
    - In **Channel ID**, enter the ID of the Oracle Web channel that you created in Oracle Digital Assistant.

Note: You can now begin to enable, configure, and test the sales assistant for CX Sales Mobile by using the Mobile Application Setup tool as outlined in the following sections. You must perform these tasks only from a new sandbox.

Enable Sales Assistant in the Mobile Application

Here's how to enable sales assistant for CX Sales Mobile in the **Mobile Application Setup** tool.

1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Create a new sandbox to use for your configurations.
3. Select **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, or on the Overview page, click **Mobile Application Setup**.
5. Click the **CX Sales Mobile Composer** tab.
6. In the Application Features pane, click **Settings**.
7. In the mobile interface designer, click **Oracle Sales Assistant Settings**.
8. Enable sales assistant by using the **Enable** toggle.
9. Oracle Sales assistant is available for all roles and regions by default. If you would like to restrict access, you can specify the roles and regions that can use sales assistant in the **Assigned Roles** and **Assigned Regions** fields. Just click the relevant field and select the roles and regions to assign access.

10. The **Enable Attachments** is selected by default and allows you to ask to view or upload attachments to your record.

    The **Enable Notes** is also selected by default and allows you ask to view or add notes.

    > **Note:** If you don't have access to attachments or notes in Oracle Sales, you won't be able add attachments or notes and won't be able to get any notes via Oracle Sales Assistant.

11. Click **Save**.

Enable or Disable Sales Assistant for Standard or Custom Objects

Finally, you need to specify which objects can be used with sales assistant.

1. In the Applications Features pane, click **Home**.
2. In the mobile interface designer, click the standard or custom object you would like to enable for sales assistant and in the Feature Details pane, click the **Enable for Sales Assistant** toggle.

   > **Note:** Sales assistant isn't available for the following objects: Calls to Log, Products, and Partners. Creating call reports is supported, but searching for them isn't.

3. Click **Save**.

Test Your Configurations

Test and then publish your sales assistant configurations. See the *Test Your Configurations* topic for details about how to check your mobile configurations.

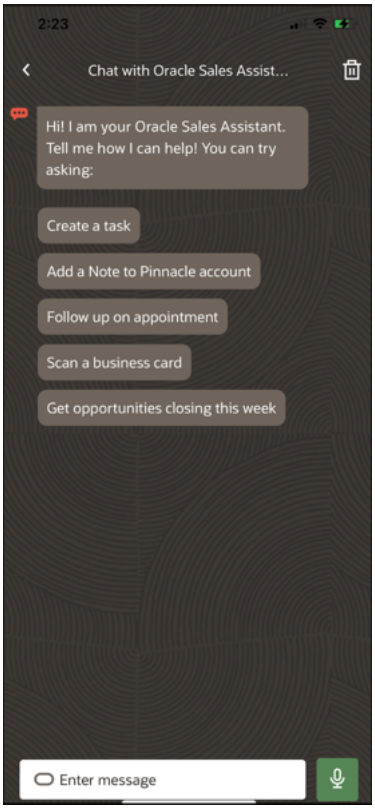
FAQs for CX Sales Mobile

Can I modify the Sales Assistant welcome message for CX Sales Mobile?

Yes, your administrator can now create a new or modify an existing welcome message with some suggestions of what sales representatives can do and say to the sales assistant which are relevant to your business.

Your administrator can modify the message in the Oracle Sales Assistant Common Configuration Tool within Application Composer.

For example, here's a sample sales assistant screenshot of a CX sales mobile welcome screen.



Related Topics

- Edit Strings in Oracle Sales Assistant Common Configuration Tool

Common Configurations

Overview of Managing Synonyms for Sales Assistant

A synonym is a word or phrase with a similar meaning for the CX objects and fields used in utterances sent to Oracle Sales Assistant.

Synonyms for CX objects and fields allow Oracle Sales Assistant to understand the objects and fields your user is asking about, based on your company's jargon. These can include abbreviations, slang terms, and common misspellings.

For example, your salespeople may call or refer to "opportunities" as "deals". The Oracle Sales Assistant Common Configurations administrator tool provides an easy way for you to manage synonyms for all supported channels without having to manually manage them in Oracle Digital Assistant.

Navigate to the Common Configuration Tool

Here's how to navigate to the Oracle Sales Assistant Common Configurations tool.

1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Select or create a sandbox that you want to use for your configurations. Make sure that your sandbox includes Application Composer as an active tool.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
5. Click the **Common Configurations** tab to open the Oracle Sales Assistant Common Configurations tool.

When the Common Configurations tool opens, it first checks if there are skills compatible with current version of your sales application. Currently, Oracle only supports the same skill version as the latest sales application version. For example, if your sales application version is 21.04, then the skill version must also be 21.04. A message is displayed if there are no skills found with the same version.

If a skill version matches your sales application, then the Common Configurations tool displays both a left panel and a right panel. The right will be empty. The left panel consists of 1 main **Synonyms** section.

Use the Common Configuration Tool to Update Synonyms

To ensure that Sales Assistant is aware of any objects enabled from the CX Sales Mobile composer tool or Microsoft Teams composer, you can use the Oracle Sales Assistant Common Configurations administrator tool to update synonyms for the objects enabled.

Update Synonyms for Objects Enabled for Oracle Sales Assistant

Here's how to update synonyms for objects enabled for your Sales Assistant.

1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
5. Click the **Common Configurations** tab to open the Oracle Sales Assistant Common Configurations tool.
6. Expand the **Synonyms** section and under the **CX Objects** section, select the object for which you want to update synonyms.
    - The objects displayed are objects are that enabled for Oracle Sales Assistant for any supported channels.
    - If you're looking for a child object, first select the parent object, such as "Opportunities", from CX Objects section. Then select the child object from the **Child Objects** section, such as "Opportunities Child Objects".
    - If the child object is also a top-level object, select the top-level object to define the synonyms required.
7. From the **Object Name Synonym(s)** field in the right pane, enter the synonym that you want for the selected object in the Enter Synonym(s) text box and press **Return**.
    - Once the synonym is added, it displays in the list of synonyms for the object.

    > **Note:** Predefined synonyms can't be removed. To remove a custom synonym, select it from the list and click the X icon.
8. Click **Save**. The Select Sales Assistant Skill dialog is displayed.

9. From the **Select Sales Assistant Skill** dialog, select the Sales Assistant skill that you want the updated synonyms for objects transferred to.
10. Click **Save**.

    An in progress notification is displayed during the transfer and a success message is displayed when the transfer successfully completes. The next time you update and save synonyms for an object, the Select Sales Assistant Skill dialog displays the last updated Sales Assistant skill that you have saved to.

    > **CAUTION:** An error message displays if there is an problem during the transfer to the skill. Any updates you made won't be saved if you exit the Common Configurations administrator tool at this stage.

Update Synonyms for Fields Enabled for Oracle Sales Assistant

Use the Oracle Sales Assistant Common Configurations administrator tool to update synonyms for the fields to use in a conversation. You want to ensure that Sales Assistant is aware of the fields you want your users to use in a conversation with the assistant from any of supported channels, such as updating a synonym for a field used to search for a record.

Here's how to update synonyms for your Sales Assistant fields.

1. Sign in to the Oracle CX Sales application as a user with a Sales Administrator role.
2. Select the sandbox you want use for your configurations.
3. Open Application Composer by selecting **Application Composer** under the Configuration category in the Navigator menu.
4. Under the Common Setup Menu, click **Oracle Sales Assistant Setup**.
5. Click the **Common Configurations** tab to open the Oracle Sales Assistant Common Configurations tool.
6. Expand the **Synonyms** section and under the **CX Objects** section, select the object for the field which you want to update synonyms.
    - If you're looking for a field of a child object, first select the parent object, such as "Opportunities", from CX Objects section. Then select the child object from the **Child Objects** section, such as "Opportunities Child Objects".
7. Once the object is selected, select a field from the **Fields** section in the right pane, enter the synonym that you want for the selected field in the Enter Synonym(s) text box and press **Return**.
    - Once the synonym is added, it displays in the list of synonyms for the field.

      > **Note:** Predefined synonyms for fields can't be removed. To remove a custom synonym for a field, select it from the list and click the X icon.
8. Click **Save**. The Select Sales Assistant Skill dialog is displayed.
9. From the **Select Sales Assistant Skill** dialog, select the Sales Assistant skill that you want the updated synonyms for fields transferred to.
10. Click **Save**.

    An in progress notification is displayed during the transfer and a success message is displayed when the transfer successfully completes. The next time you update and save synonyms for a field, the Select Sales Assistant Skill dialog displays the last updated Sales Assistant skill that you have saved to.

    > **CAUTION:** An error message displays if there is an problem during the transfer to the skill. Any updates you made won't be saved if you exit the Common Configurations administrator tool at this stage.

Tips for Adding or Updating Synonyms for Objects and Fields

Here are some tips for adding or updating synonyms for objects or fields

- If there are no skills of the same version as your sales application, then you must navigate to your Oracle Digital Assistant environment to get the latest version of the Sales skill from the Skill Store (via FADigitialAssistant).
- Synonyms can't contain characters such as, : (colon) or , (apostrophe) and can't end with ? (question mark), " or ' (double or single quote mark), or . (period).
- Synonym values aren't case-sensitive. For example, USA and usa are considered as the same value.
- You can't add synonym(s) that are already present in an object or a field. An error message displays if you try to add a duplicate synonym to the list.
- You can't add synonym(s) if the synonym is part of a set of reserved words for the Oracle Sales Assistant. An error message displays if you try to add a synonym that contains a reserved word to the list.
- If you add a synonym to a formula field, then Oracle Sales Assistant won't be able to search on the field because formula fields aren't searchable.

Edit Strings in Oracle Sales Assistant Common Configuration Tool

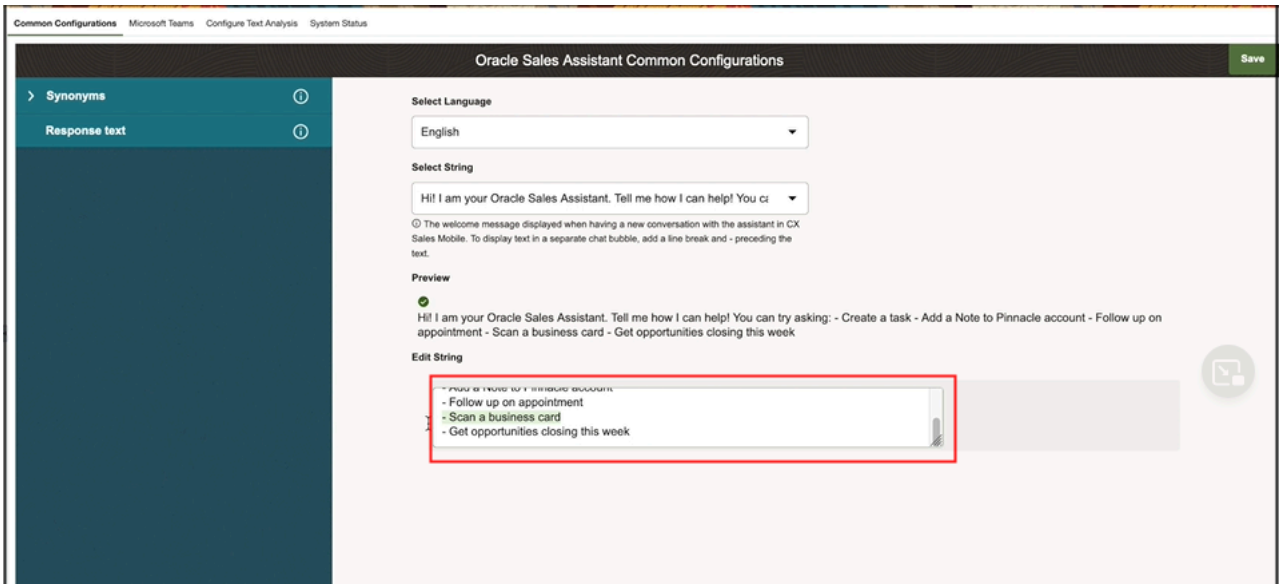
Use the Oracle Sales Assistant Common Configuration tool to update phrases or strings from the sales assistant. Responses from the sales assistant are based on such phrases or strings and applies to either CX Sales Mobile, Microsoft Teams, or users of both channels.

For example, you can modify the sales assistant help text to make the answer more relevant in response to a user's request for help on a contact list.

Follow these steps to update strings using the common configuration tool:

1. Create and enter a publishable sandbox where Application Composer is enabled.
2. Navigate to Application Composer.
3. Click **Oracle Sales Assistant Setup**.
4. Click the **Common Configurations** tab to open the Oracle Sales Assistant Common Configurations tool.
5. Click on the **Response Text** section.

6. In the **Select String** drop down list, search for the string you want to update. For example, search for "I am your Oracle sales Assistant" as shown in this sample screenshot to locate the CX Sales Mobile's sample welcome message.

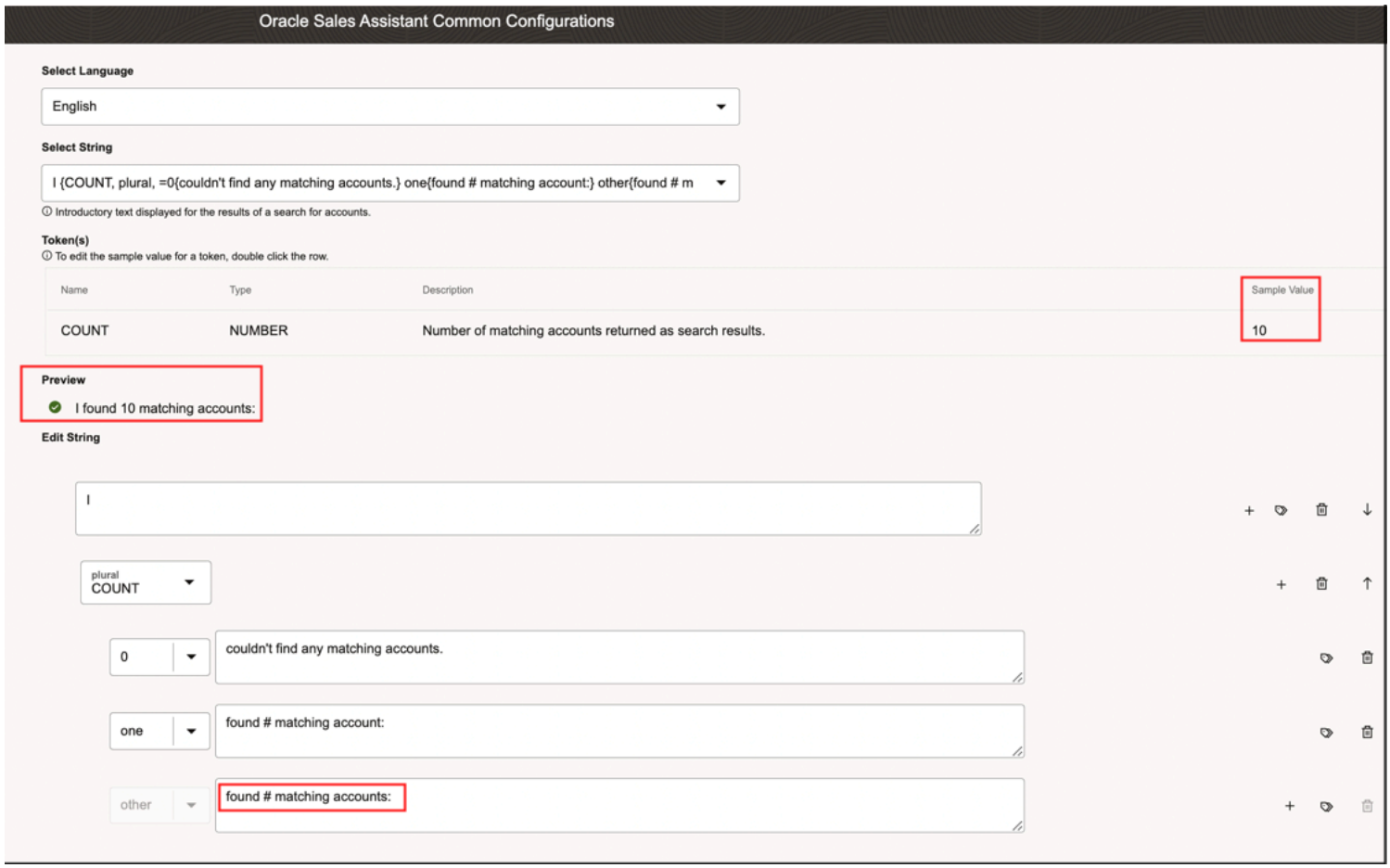


7. Select the string you want and make your changes in the **Edit String** field.

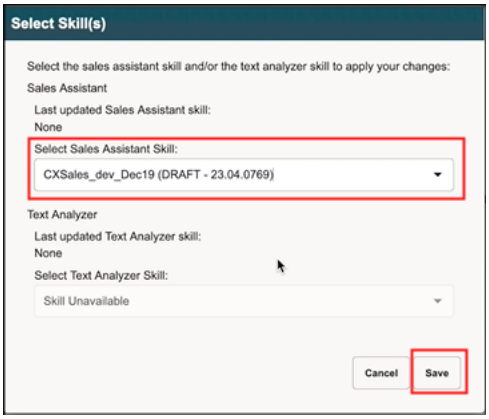
   Strings are in ICU format. Some strings contain tokens and some strings are pluralized. You can preview how the string will be rendered under the **Preview** section. For example, if your string contains tokens, for each token, double

click on the token row and enter the value in the **Sample Value** section. You can then preview the rendered string based on the sample value you enter.

Here's a sample screenshot that highlights where to enter and preview a sample token value from the Sales Assistant Common Configurations tool.



8. Click **Save**. The Select Sales Assistant Skill dialog is displayed.



9. From the Select Sales Assistant Skill dialog, select the Sales Assistant skill that you want the updated string to transfer to.
10. Click **Save**.

Related Topics

- Can I modify the Sales Assistant welcome message for CX Sales Mobile?

43 Web Activity Rules

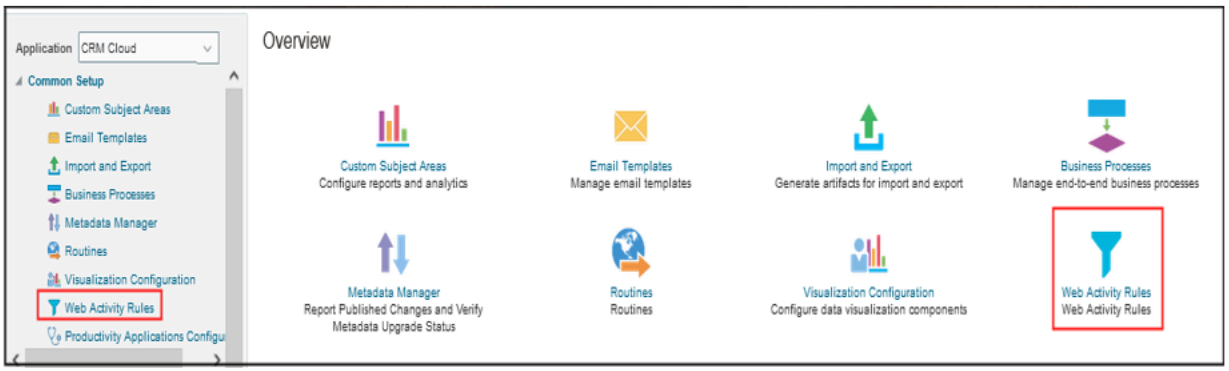
About Web Activity Rules

You can perform an activity sync from Oracle Eloqua to CX Sales contacts, leads and opportunities that exist in CX Sales. Use the Web Activity Rule expression builder to define rules to include or exclude web activity records for the objects that are of interest.

For example, you might want to create a web activity rule that imports only those emails that were sent from a campaign after a specific date and exclude any emails that have the term " Oracle" in the email subject.

Here's how to access web activity rules.

1. Open Application Composer by selecting **Configuration > Application Composer** in the Navigator menu.
2. Under the Common Setup Menu, click **Web Activity Rules** to open the Web Activity Rules UI.



You can create rules to import records for the following web activity types:

- Email Open
- Email Click-Through
- Email Send
- Form Submit
- Page View
- Web Visit

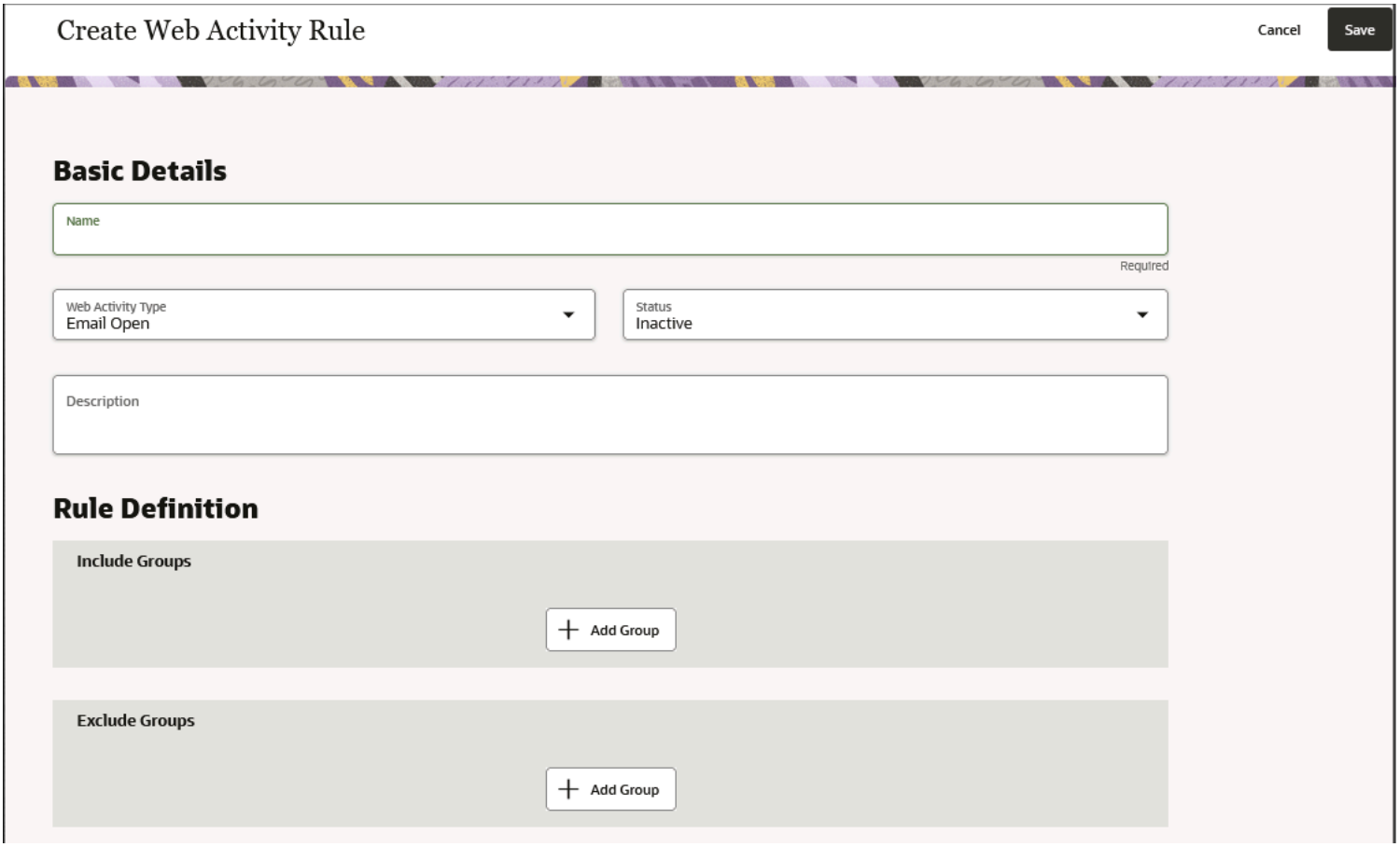
Any rules that you have already created are displayed in the Web Activity Rules list page. It shows the name of the rule as well as the type, status, creation and last updated dates and the name of the user who performed the last updates to the web activity rule.

Manage Web Activity Rules

From the Web Activity Rules page, you can view previously created rules, create, edit, and delete a rule to either include or exclude all or any attributes for the Campaign and Web Activity objects.

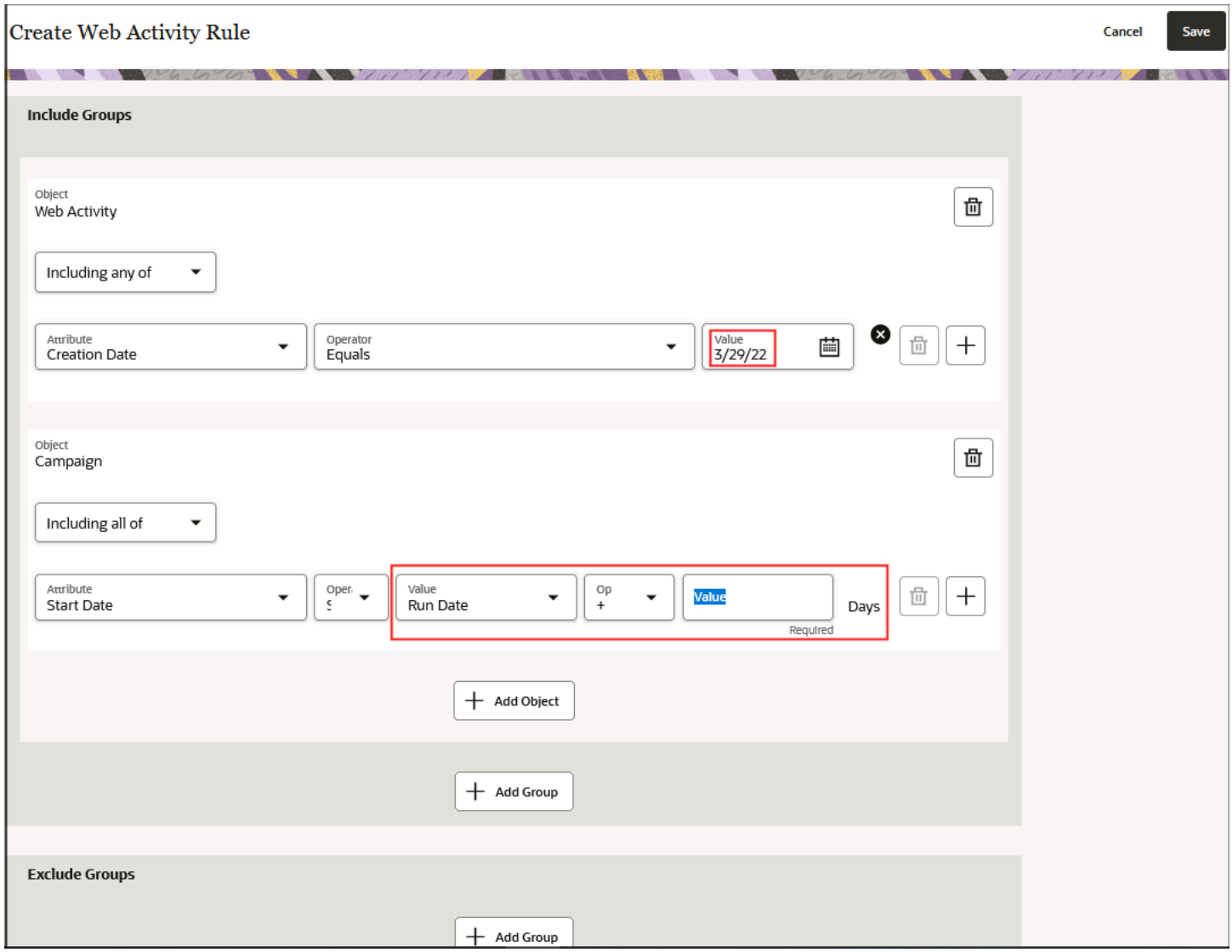
Here's how to create, edit, and delete a web activity rule.

1. Sign in as a sales administrators or user with the appropriate access privileges.
2. From **Application Composer** > **Web Activity Rules**, navigate to the Web Activity Rules page and click **Create**.



3. In the **Basic Details** section, enter the name and a brief description of the rule and the type of web activity to want to define the rule.
4. In the **Rule Definition** section, click **Add Group** to include or exclude groups of attributes for your selected object that you want to define for your web activity.

5. Click **Add Object** to select either the Campaign and Web Activity objects. Select the attributes, operators, and values that you want to define for the conditions of your rules.



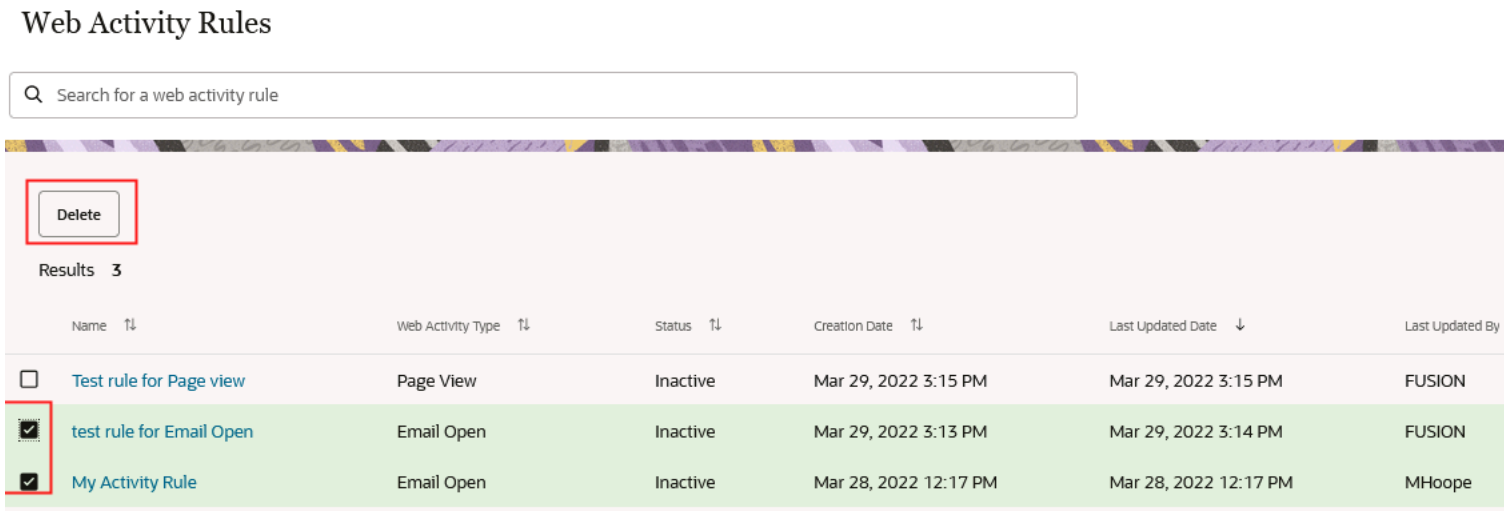
You can define multiple rules for each of your objects. Click the plus (+) sign at the end of each row to add another rule associated to your web activity type.

> **Note:** For date values, you can select the specific date that you want or you can specify a run date plus or minus a specific number of days in integer format. For example, for date-related attributes you specify a run date plus 7 days. This means that if all or any of the rules are met, the rule will continue to process and update records 7 days past the specified run date.

6. When you're done with including and excluding group for the objects you want and have defined all the rule conditions, you can activate the rule by changing the **Status** field in the Basic Details section from Inactive to **Active**.
   You can only set 1 rule to Active for each web activity type.
7. Click **Save**.

Change Web Activity Rules

1. From **Application Composer** > **Web Activity Rules**, navigate to the Web Activity Rules page.
2. In the **Name** field, double-click the rule you want to edit. Note that you can change the basic details expect for the name of the rule and you can change all or any of the rule conditions.
3. Click **Save** to update the web activity rule name with your changes.
4. To delete rules that no longer apply, select them from the list page and click **Delete**.



44 Sales Intelligence

Sales Intelligence Features and Technologies

Sales Intelligence includes many analytics and artificial intelligence features that can help your sales organization improve sales efficiency and productivity.

The features use different technologies developed by different teams at Oracle:

- Adaptive Intelligence (Oracle AI Apps for Sales)

  Uses machine learning models and analytics to help with processing leads and converting opportunities to deals. For leads, Adaptive Intelligence (now renamed Oracle AI Apps for Sales) provides salespeople with the probability of a lead being converted to an opportunity (the lead score). For opportunities, Adaptive Intelligence recommends the best actions to take on an opportunity. For Oracle Sales in the Redwood User Experience, the recommended actions for opportunities appear automatically along with other recommendations at the top of the list of activities. For classic Sales, you must add these to the UI using Application Composer.

- Machine Learning

  A platform for creating sales machine learning models. Oracle provides you with a sample Similar Accounts model that identifies similar accounts using location, size, industry, and other factors. As a sales administrator without prior artificial intelligence (AI) modeling expertise, you can configure your own version of the Similar Accounts model, or you can develop completely new machine learning models of your own. The Similar Accounts model is enabled by default.

  For Oracle Sales, salespeople can review similar accounts simply by entering "Show similar accounts" in the **Action Bar**. For classic Sales UI, you must expose this feature using Application Composer.

- Sales Insights

  Analyzes historical account, lead, opportunity, and contact data to provide salespeople with recommended actions. As a sales administrator, you can enable or disable individual recommendations and change their wording.

Here's a list of the different Sales Intelligence features that you can enable by using the Enable Sales Intelligence Features task from Setup and Maintenance. When you enable a feature, the application determines if you've enough data to make the feature active. If the feature is available for use, you can then configure it further using the administration UIs for each technology.

Account Recommendations

Feature	Description	Technology
Account Engagement Level	Rates the level of engagement of the sales organization with each account. The rating is based on the number of active leads, the number of deals, and the frequency of interactions and activities with the account.	Sales Insights

Feature	Description	Technology
Similar Accounts	Identifies similar accounts by such factors as industry, address, and company size.	Machine Learning

Contact Recommendations

Feature	Description	Technology
Lead Contact Recommendations	Recommends contacts to add to leads. Contacts are recommended based on their involvement in past successful leads, deals, and their level of interactions with the sales organization (the number of meetings, calls, and emails).	Sales Insights
Lead Contact Validation	Recommends contacts from similar leads that have been converted into opportunities.	Sales Insights
Opportunity Contact Recommendation	Recommends contacts from similar successful opportunities.	Sales Insights
Opportunity Contact Validation	Recommends contacts that are often added to similar opportunities.	Sales Insights

Lead Recommendations

AI Feature	Description	Technology
Effectiveness of Lead Activities	Suggests what activities that a salesperson should take on a lead based on the activities associated with successful leads.	Sales Insights
Lead Score (AI Lead Score)	Indicates the probability of a successful conversion of sales leads to opportunities. **Note:** There are two types of lead score in the application: Score and AI Lead score. We're talking about the AI Lead Score in the UI.	Adaptive Intelligence

Opportunity Recommendations

AI Feature	Description	Technology
Opportunity Activity Effectiveness	Suggests what activities that a salesperson should take on opportunities based on the activities associated with successful leads.	Adaptive Intelligence
Opportunity Next Best Action	Recommends actions from similar deals closed in the past.	Adaptive Intelligence

AI Feature	Description	Technology
Opportunity Predicted Win Probability	Predicts win probability using historical data.	Adaptive Intelligence

Enable Sales Intelligence Features

You can enable the Sales Intelligence features provided by Oracle from the Setup and Maintenance work area. Here's how.

1. In Setup and Maintenance, open the **Enable Sales Intelligence** task:
    - Offering: Sales
    - Functional Area: Intelligence in Sales
    - Task: Enable Sales Intelligence
2. On the Enable Sales Intelligence Features page, Select Features panel, click **Start**.
3. Select the features that you want to enable.
4. Click **Continue**.

   The application runs a process to determine if you have sufficient data to enable the features. This process may take a while to complete, so you can close the flow and wait for a notification email.
5. On the View Feature Eligibility Report page, you get feedback if you have sufficient data for each feature. Optionally, you can enable and disable features here as well.
6. Click **Continue**.
7. The Verify Recommended Features step lists the features you are enabling by technology. You must complete any additional configuration steps in the admin UIs for each technology.
8. Click **Continue**.
9. In the Configure Recommended Features page, you can click the links to open the administration UIs for technologies related to the features you enabled. Links are available for Adaptive Intelligence and Machine Learning (Similar Accounts). There is no direct link for Sales Insights. You can also navigate to these UI pages separately.

Adaptive Intelligence

Overview of Adaptive Intelligence

Adaptive intelligence uses a combination of machine learning models and decision-based analytics that help you prioritize leads and recommends what best actions to take on opportunities.

When salespeople work on leads, they see adaptive intelligence predictive lead scores that help them prioritize their leads better. When they view their opportunities, they get recommendations to increase their win rates. Salespeople can use these features to improve their productivity and close deals faster.

Before your salespeople can view opportunity recommendations and lead scores, you need to complete a few integration and configuration steps.

1. Create a user account for integration.

2. Import data from Oracle CX Sales.
3. Set up attributes and filters for opportunity win probability and lead scoring prediction.
4. Configure lead scores and recommended actions.

Create a User Account for Integration

Before you start integrating Oracle CX Sales with Oracle AI Apps for Sales, create a user account in Oracle CX Sales for AI Apps to access sales data.

Ensure that this user has the Sales Administrator job role assigned with access to all opportunities, accounts, contacts, leads, and activities in Oracle CX Sales. To learn how to create and assign roles, see Create Application Users in the Securing CX Sales and Fusion Service guide.

About 15 minutes after you create the user account, you can use this account credentials in the Add Service Connection dialog box as detailed in the topic Import Data from Oracle CX Sales.

> **Note:** It's important to set a calendar reminder a few days before your password is set to expire, and reset the password. Update the password on the Edit Service Connection dialog box so that your connection remains intact.

Related Topics

- How do I create application users?
- Create Roles in the Security Console

Connect AI Apps for Sales to CX Sales and Import Sales Data

Set up the connection and import data into AI Apps for Sales from Oracle CX Sales using basic manual steps and configuration. After a successful connection, the application can access and import data from Oracle CX Sales.

Set Up Connection

If you've enough data to configure AI Apps features, the Configure Recommended Features page, the last page in the Enable Sales Intelligence task includes the Adaptive Intelligence Activation link.

To complete your configuration, you need to import data from CX Sales.

1. On the Configure Recommended Features page, click **Adaptive Intelligence Activation**.

   The Adaptive Intelligence Activation page lists all the selected features. However, you can't activate them till you set up your connection to import data.
2. On the Adaptive Intelligence Activation page, click **Add Service Connection**.

3. In the Add Service Connection dialog box, enter the following details:
    - Service Endpoint URL: Your Oracle CX Sales host name in the format `https://<osc_host_name>`. For example, `https://abcd.fa.us6.example.com`.
    - User Name and Password: User name and password of the Oracle CX Sales user account that you created earlier.
    - Data Import Start Date: Optionally, select the date from when you want to ingest data from Oracle CX Sales. If you don't select a date, the application ingests all the available data.

    > **Note:** After you set the date, don't edit the Data Import Start Date field. Contact Oracle Support to update the field.

4. Click **Connect**.
   The connection is tested against your Oracle CX Sales host and is saved if successful.

   > **Note:** Update the endpoint URL only if recommended by Oracle Support. Reading a different data set into an existing Oracle AI Apps for Sales instance might result in distorted predictions.

5. After you set up the connection, click **Activate** to enable all the selected features.
   Data ingestion starts immediately.

To complete configuring each feature, see:

- *Set Up Attributes and Filters for Opportunity Win Probability and Lead Scoring Prediction*
- *Configure Lead Scores and Recommended Actions*

Set Up Attributes and Filters for Opportunity Win Probability and Lead Scoring Prediction

You can configure what fields and records you want AI models to consider, to predict opportunity win probability or lead score.

You can do one of these on the Opportunity Win Probability and Lead Scoring pages:

- Use filters to exclude records for parent objects such as Lead, Opportunity, or Account. For example, for the Opportunity object, you can set a filter as **Sales Channel Equals Indirect**. This means that if an opportunity has the value for Sales Channel as Indirect, it wouldn't be considered for prediction.
- Replace ready to use fields (also called attributes) for any object used by AI models with custom fields that have matching data types.
  For example, for an opportunity win probability prediction in the Activity object, you might not want the models to consider the `ActivityTypeCode` field. You might instead want the model to consider data from the `ActivityCategory_c` custom field. When you select this replacement, the models will consider activity category across opportunities that were won as one of the factors to predict the win probability of new opportunities.

To configure opportunity win probability and lead scoring:

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

- Functional Area: Intelligence in Sales
- Task: Configure AI Apps in Sales

2. On the Intelligence in Sales page, click **Configure AI Apps in Sales**.
3. On the Configure AI in Sales page, select one of these options based on what you want to configure:
   - **Opportunity Win Probability:** Select this to configure attributes for opportunity win probability prediction.
   - **Lead Scoring:** Select this to configure attributes for lead score prediction.
4. On the Opportunity Win Probability or Lead Scoring page, from the **Object** list, select the object from which you want to remove or replace attributes.

   > **Note:** The **Object** list consists of parent and child objects. For parent objects, you can also apply a filter to select specific records in objects that you want to exclude in the model.

   After you select an object, attributes related to that object are listed in the Model Feature Configuration table. In the Model Feature Configuration table, you can do one of these:
   - Click the **Edit** icon to replace the ready to use attribute with a custom attribute. Select a custom attribute from the list in the **Replace With** field. You can only replace an attribute with another if they share the same data type. For example, if you're replacing an attribute whose data type is string, the attribute you're replacing it with must also have string as the data type.

     > **Note:** You can only replace certain ready to use attributes.

   - Click the **Delete** icon to delete a custom attribute mapping for a ready to use attribute. Deleting this mapping clears any replacement selections that you made for the ready to use attribute in the **Replace With** field.
5. Click **Save**.

The models will now use the dataset from the attributes based on how you've set them up here.

Configure Lead Scores and Recommended Actions

You must complete configuration steps in Oracle CX Sales for lead scores to display on leads, and for recommendations to display on opportunities.

- For lead scores to appear on the Leads Summary page and in the Workspace, edit the required profile option, and add the AI Lead Score field to the Leads Summary page and in Workspace.
- For recommendations to appear for your opportunities, configure the Next Best Action feature and add the Recommended Action column to the Opportunity and the Edit Opportunity pages.

Related Topics

- Edit the AI Update Who Columns Threshold Profile Option
- Set Up Best Sales Action for Opportunities

Lead Artificial Intelligence (AI) Score

About Artificial Intelligence (AI) Lead Score

You can add the AI Lead Score field to indicate the lead conversion probability of a sales lead being converted to an opportunity.

Lead scores are numeric values typically ranging from 1 to 100 and where the higher value represents a high conversion probability. Using Oracle AI Apps for Sales, lead scores can help increase the productivity of salespeople. At a glance, it helps them prioritize and focus on those leads that are more likely to get converted to opportunities.

Before you can use lead scores, you must have Oracle AI Apps for Sales integrated with CX Sales.

Related Topics

- Overview of Adaptive Intelligence

Edit the AI Update Who Columns Threshold Profile Option

The AI Update Who Columns Threshold (ORA_ZCA_AI_UPDATE_WHO_THRESHOLD) profile option specifies the percentage threshold value for both the AI Lead Score field for Leads and the Predictive Win Probability field for Opportunities. The profile option is set to 5 percent by default.

If the score in either of these fields exceeds or equals the percentage threshold value specified in the profile option, then the Last Updated Date field gets updated for the lead or opportunity record.

For example, lets say that the AI Lead Score was 50, and it changed to 60. Then the % change is 20%. If the 20% is greater than or equal to the specified threshold value set in the profile option value, for example 5%, then the Last Updated Date is updated on the Lead record.

Here's how to edit the AI Update Who Columns Threshold profile option:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name ORA_ZCA_AI_UPDATE_WHO_THRESHOLD in the **Profile Option Code** field.
3. Click **Search**.
4. In the list that's returned, click on the profile option code link.
5. Set the profile option value to the required value.

    For example, change the threshold default value from 5 to a percentage threshold value to suit your business requirements. So, for example if the lead score or the predictive win probability for an opportunity increases by more than 3 percentage points, then alert your salespeople so that they can focus on those leads and opportunities that are more likely to get converted. The **Last Updated Date** field on the record also gets updated when the threshold you specify is exceeded.
6. Click **Save and Close**.

Add AI Lead Score in Leads UI

You need to make the AI Lead Score field available on the Leads UI. For details on how to do this in the Digital Sales UI, follow the example topic, "Add a Custom Field to the Edit Contact Page", in the Oracle Fusion Cloud Sales Automation Extending Digital Sales (Next Gen Sales) guide. To access this guide, contact your Oracle representative. For the CX Sales UI, you need to do this through Application Composer, as detailed in this topic.

The field is hidden by default so you must manually unhide it so that it's available as a display-only field for the Edit Lead and Lead List pages.

Here's how to display the **AI Lead Score** field in Lead pages:

1. Create or activate an existing sandbox.
2. Navigate to Application Composer from the Configuration category in the Navigator.
3. In the navigation tree, expand **Standard Objects**, then expand the **Sales Lead**, and click **Pages**.
4. Ensure that the **Application Pages** tab is selected.
5. In the Details Page Layouts region, duplicate the standard layout by highlighting the standard layout and clicking the **Duplicate** icon.
6. Type a new layout name and click **Save and Edit**.

   The Details Layout page appears.
7. Edit the Summary region.
8. Select the **AI Lead Score** field from the list in the Available Fields region and move it to the Selected Fields region.

   > **Note:** Repeat these steps for the Landing Page Layouts section if you want the AI Lead Score field displayed on the Lead List page.

9. Test the changes: Navigate to **Sales** > **Leads** as a user with access to the leads pages, for example, as a salesperson. Edit a lead and ensure you can see the AI Lead Score field.
10. Publish the sandbox.

Enable the Lead Score for Display in Workspace UI

You must make the AI Lead Score field available for display in Workspace.

You can select the **Display in UI** option in the Configure Adaptive Search page, **Configure UI** tab to display the **AI Lead Score** field as a column in search results and saved searches.

For more information, see the related topics, Enable Fields for Display as Filters and Search Result Columns, and Monitor Adaptive Search Background Processes in the Adaptive Search and Workspace chapter of the Implementing Sales guide.

Related Topics

- Enable Fields for Display as Filters and Search Result Columns
- How do I monitor Adaptive Search background processes?

Recommended Actions

Set Up Best Sales Action for Opportunities

You must configure the best sales action and expose it in the UI.

1. In Setup and Maintenance, go to the following:
    - Offering: Sales
    - Functional Area: Intelligence in Sales
    - Task: Configure Best Sales Action

    You can alternatively navigate to the Configure Best Sales Action page from the **Configure AI Apps in Sales** task. On the Configure AI in Sales page, click **Next Best Action**.
2. Select the **Best sales action enabled at site level** check box and click **Save** if you want this feature to be available to all users.

    If you want the feature to be available to a subset of users, deselect the check box and click **Save**, and then edit the Enable Adaptive Intelligence profile option (ZCA_ENABLE_ADAPTIVE_INTELLIGENCE). See the topic, *Edit the Enable Adaptive Intelligence Profile Option*.
3. On the Configure Best Sales Action page, enter a value for **Display alert when user-provided win probability differs by this amount** under the Predicted Win Probability section.

    The artificial intelligence predicted win probability indicator (warning alert) displays based on the results.

    > **Note:** The value you enter is the minimum threshold to display the win probability warning indicator for opportunities. If the difference between the salesperson's win probability prediction and the artificial intelligence prediction is more than the value you set here, the warning indicator appears. For example, if the value is set to 25 and the salesperson's win probability prediction is 20%, and the predicted win probability is 50%, the warning indicator appears.

    See the topic: *Edit the Opportunity Win Probability Risk Threshold Profile Option*.
4. In the table under **Recommended Action**, enable the recommended action that you want to be displayed by selecting the associated check box.
5. Optionally, edit the Action and Explanation fields for the selected recommend actions to suit your organization needs.
6. Click **Save** to save your changes or click **Cancel** to return to the Setup and Maintenance search page.

Next, for the CX Sales UI, you want to extend your opportunity pages using application composer to include the UI elements you want, for example:

- **Recommended Action** and **Win Probability** columns in the Opportunities list page
- **Recommended Actions** section and **Win Probability** and **Predicted Win Probability** fields in the Edit Opportunity page

Your salespeople see alerts in the **Win Probability** column for those opportunities where the threshold has been exceeded.

If you're using the CX Sales UI, see the topic *Add Recommended Actions to Opportunities* and follow the steps.

Add Recommended Actions to Opportunities

This topic only applies to the CX Sales UI where you need to add the Recommended Actions fields to Opportunities list and Edit Opportunity pages. For the Redwood User Experience, recommended actions appear along with other recommendations and these steps don't apply.

> **Note:** You can enable sales recommendations for Opportunity next best actions in the Redwood User Experience. The sales recommendation feature analyzes text of notes and call logs and recommends follow-up tasks and appointments. When enabled, this feature replaces the automatic creation of a task after call wrap ups. See *Enable Sales Recommendations* for more information.

After you've configured the best sales action feature, for the CX Sales UI, you need to use Application Composer to display UI elements in your opportunity pages to display recommendation actions. For example, you can:

- Display the **Recommended Action** and **Win Probability** columns on the Opportunities list page
- Display the **Recommended Actions** section and the **Win Probability** and **Predicted Win Probability** fields on the Edit Opportunity page.

> **Note:** If you're using Sales Coach, then use Application Composer to also display the Sales Coach UI elements in your opportunity pages. You must specify what sales method to apply to all newly created opportunities by setting the profile option Sales Method Default.

Here are the high-level steps to add opportunity-related UI elements, such as Recommended Action and Win Probability columns and Recommended Actions section to the relevant Opportunity pages:

1. Enter a sandbox. See the Overview of Sandboxes topic for details.
2. Navigate to Application Composer.
3. Expand the **Opportunity** object tree.
4. In the Opportunity tree, click the **Pages** link.
5. Ensure that the **Application Pages** tab is active.
6. In the region that corresponds to the page you're modifying, duplicate the standard layout or select a custom layout if one exists, and edit the resulting layout. For example, use these steps to expose the Recommended Action and Win Probability columns to the opportunities list page:
    - In the Landing Page Layouts work area, select Standard Layout, then select Duplicate from the Actions menu.
    - Click the Edit icon for the Opportunity list page.
    - In the Landing Page Layout, locate and select **Recommended Action**, and **Win Probability** and move them from the Available Fields list to the Selected Fields list.
7. Next, navigate to the Details Page Layout region, duplicate the standard layout, and then edit the resulting layout.
8. On your custom details layout page, click **Show** next to Recommended Actions to ensure that this section appears on the Opportunity details page.
9. Save your changes.
10. Test the changes you just made.
11. Publish the sandbox.

After you complete these configuration steps, your salespeople see the Recommended Action and Win Probability columns in the Opportunity list page and the Recommended Actions section in the Edit Opportunity page.

Related Topics

- Overview of Recommended Actions for Opportunities
- Overview of Sandboxes
- Extend Pages for Opportunities
- Page Layouts for Standard Objects

Edit the Enable Adaptive Intelligence Profile Option

The Enable Adaptive Intelligence (ZCA_ENABLE_ADAPTIVE_INTELLIGENCE) profile option enables the viewing of integration results between Oracle AI Apps for Sales and your sales application. The profile option is set to No by default.

Here's how to edit the Enable Adaptive Intelligence profile option:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name ZCA_ENABLE_ADAPTIVE_INTELLIGENCE in the **Profile Option Code** field.
3. Click **Search**.
4. In the list that's returned, click on the profile option code link.
5. Set the profile option value to the required value.

    For example, to roll out the best sales action feature to a subset of users:
    - From the ZCA_ENABLE_ADAPTIVE_INTELLIGENCE: Profile Values section, click the New icon.
    - In the **Profile Level** drop down list, select User.
    - Enter the users you want to avail of the feature in the **User Name** field.
    - Select Yes in the **Profile Value** field.
6. Click **Save and Close**.

After you enable the profile option, you can extend the opportunity list and detail pages to display the Recommended Actions section and related steps. In addition, the Recommended Action column is displayed on the Opportunities edit page only after you add it to the Opportunities detail page using Application Composer. For more details, see the Add Recommended Actions to Opportunities topic.

Related Topics

- Add Recommended Actions to Opportunities
- Overview of Recommended Actions for Opportunities
- How do I update existing setup data?

Edit the Opportunity Win Probability Risk Threshold Profile Option

The Opportunity Win Probability Risk Threshold (MOO_WIN_PROB_AI_THRESHOLD) profile option lets you specify the threshold value used to determine the percentage win probability differential. The artificial intelligence predicted win probability indicator displays based on the results. The default percentage win probability differential is 30.

The Win Probability percentage column on the Opportunities page shows the likelihood to win the opportunity that's predicted by the artificial intelligence algorithm. This prediction might differ from the salesperson's estimation of win probability by more than the value set in the Opportunity Win Probability Risk Threshold profile option. In this case, the Win Probability column displays a warning indicator. For example, if the profile option value is set to 25 and the win probability is 20 percent, and the predicted win probability is 50%, the indicator appears.

Here's how to edit the Opportunity Win Probability Risk Threshold profile option:

1. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Sales Foundation
    - Task: Manage Administrator Profile Values
2. From the search region of the Manage Administrator Profile Values page, enter the profile option code name MOO_WIN_PROB_AI_THRESHOLD in the **Profile Option Code** field.
3. Click **Search**.
4. In the list that's returned, click on the profile option code link.
5. Set the profile option value as needed.
6. Click **Save and Close**.

Related Topics

- Edit the Enable Adaptive Intelligence Profile Option
- Add Recommended Actions to Opportunities
- Overview of Recommended Actions for Opportunities
- How do I update existing setup data?
- What's the difference between win probability and predicted win probability?

Product Recommendations

Enable Product Recommendations for Opportunities and Accounts

Salespeople can view recommended products while working on opportunities and accounts. Product recommendations are displayed based on machine learning models that analyze past sales to identify products that are often bought together.

By understanding what recommended products and services that are likely to be bought, salespeople can recommend products for up-sell or cross-sell based on recommendations generated from machine learning.

Sales administrators with the required privileges can enable the Product Recommendation for Opportunity and features by using the self service guided process for Sales Intelligence features.

> **Note:** Sales administrator must have the following privileges to access the Enable Sales Intelligence setup task **Configure Adaptive Intelligence for Sales** and the **Generate Sales Intelligence Features Data Sufficiency Report** task. Users must have the **View Recommended Products** privilege to access product recommendations for their opportunities and accounts.

Here are the high level steps:

1. In Setup and Maintenance, open the **Enable Sales Intelligence** task:

- Offering: Sales
- Functional Area: Intelligence in Sales
- Task: Enable Sales Intelligence

2. On the Enable Sales Intelligence Features page, Select Features panel, click **Start**.
3. Select the features that you want to enable. For example:
    a. Select **Product Recommendation for Opportunity** for the Opportunity object
    b. Select **Product Recommendation for Account** for the Account object.
4. Click **Continue**.

    The application runs a process to identify if you've enough data to enable the features. This process might take a while to complete, so you can close the flow and wait for a notification email.
5. On the View Feature Eligibility Report page, you get feedback if you've sufficient data for each feature. Optionally, you can enable and disable features here as well.
6. Click **Continue**.
7. The Verify Recommended Features step lists the features you're enabling by technology. You must complete any additional configuration steps in the admin UIs for each technology.
8. Click **Continue**.
9. In the Configure Recommended Features page, you can click the links to open the administration UIs for technologies related to the features you enabled. Links are available for Adaptive Intelligence and Machine Learning (Similar Accounts). There's no direct link for Sales Insights. You can also navigate to these UI pages separately.

Insights

Opportunity Win Probability Reports

You can view opportunity win probability reports on the Insights page to better understand how AI Apps recommendations are working for your opportunities.

In Setup and Maintenance, go to the following:

- Offering: Sales
- Functional Area: Intelligence in Sales
- Task: Configure AI Apps in Sales

On the Configure AI in Sales page, click **Insights**. On the Insights page, click **Opportunity Win Probability** to review the reports.

Recommended Action Status Report

Use the status report to review the trend in the number of actions recommended to your salespeople during a 12-month period.

You can also monitor data ingestion by checking the number of open opportunities and the opportunities that closed in the last 30 days. If you don’t see these numbers, check your connection settings or contact Oracle Support.

Opportunity Prediction Accuracy Report

Review the accuracy of AI Apps predictions of opportunity outcomes.

The report counts the prediction as accurate if it was correct two-thirds of the way through the opportunity life cycle. For example, let's take an opportunity that was open for 90 days and closed on September 30th. The report checks the outcome against the prediction given on August 30th. If the opportunity win prediction was greater than 50% on August 30th, and the opportunity outcome was a win, the application considers the prediction as accurate.

If the graph on the report shows a lot of variance between months, you can select **Show Moving Average** to view the average from all previous data.

Recommendations Displayed on Opportunity Pages

Your salespeople see recommendations for their opportunities when AI Apps models detect that taking a particular action improves the chances of winning an opportunity. Recommendations provide useful actions to help salespeople convert their opportunity to a win.

Recommended Action Type	Action (Displayed in Oracle CX Sales)	Description (Displayed in Oracle CX Sales)
Activity Frequency Low	Contact this account	Log more activities for this opportunity. Opportunities that we win have more frequent contact.
Time Since Last Activity High	Contact this account today	Speak to this account since there has been a gap in activities. Opportunities that we win have more frequent contact.
Deal Size High	Consider whether this deal size is realistic	Improve the win probability by decreasing the deal size if appropriate.
Contact Count Low	Broaden your contact base	Engage with more contacts as similar opportunities that closed with a win had engagement with more contacts.
Total Activities Low	Contact this account	Log more activities for this opportunity. Opportunities that we win have more activities.
Competitive Influence Strong	Review competitive plays	Improve your chances of winning by ensuring that you're well-differentiated from the primary competitor.
Deal Size Low	Consider increasing the deal size	Improve the win probability by increasing the deal size if appropriate.
Age High	Check that your opportunity is still relevant	Typically, similar opportunities close much faster.
Contact Title Low Converting	Verify that the primary contact is the decision maker	Review the decision-making ability of the primary contact to improve your chances of winning.

Recommended Action Type	Action (Displayed in Oracle CX Sales)	Description (Displayed in Oracle CX Sales)
Time Spent in Stage High	Verify the sales stage	Verify that the sales stage shows the correct status. Similar opportunities that closed with a win are no longer in this stage after this length of time.
Momentum Low	Review sales stage and increase momentum	Increase momentum as similar opportunities that closed with a win moved through the sales stages faster.

An administrator can edit the default recommended actions to suit your requirements. See *Set Up Best Sales Action for Opportunities* for details.

Lead Conversion Probability Reports

You can view lead conversion probability reports on the Insights page to better understand how AI Apps predictions are working for your leads.

In Setup and Maintenance, go to the following:

- Offering: Sales
- Functional Area: Intelligence in Sales
- Task: Configure AI Apps in Sales

On the Configure AI in Sales page, click **Insights**. On the Insights page, click **Lead Conversion Probability** to review the reports.

Lead Prediction Status Report

Use the status report to review the trend in the number of predicted leads shown to your salespeople during a specified 12-month period.

You can also monitor data ingestion by checking the number of open leads and the leads that closed in the last 30 days. If you don't see these numbers, check your connection settings or contact Oracle Support.

Lead Prediction Accuracy Report

Review the accuracy of AI Apps predictions of lead outcomes during a selected period. The accuracy is based on how many high-scoring leads got converted to opportunities. The report counts the prediction as accurate if the lead score was above 70% when the lead got converted to an opportunity.

If the graph on the report shows a lot of variance between months, you can select **Show Moving Average** to view the average from all previous data.

Data Processing Status

Overview of Data Processing Status

Use the Data Processing Status page to view a summary of ingested data in the application.

The summary includes the number of ingested open and closed opportunities, activities, contacts, open and closed leads, and so on.

In Setup and Maintenance, go to the following:

- Offering: Sales
- Functional Area: Intelligence in Sales
- Task: Configure AI Apps in Sales

On the Configure AI in Sales page, click **AI Apps Connections** to view data sources and their status. To view the data processing status, click **View Status** on the Data Sources page.

On the Data Processing Status page, use the summary to know the volume of data ingested as compared to the data volume in Oracle CX Sales. For example, if you see that the overall data volume in Oracle CX Sales doesn't match the data volume in the data processing summary, you know there's potentially an issue with data processing.

Sales Machine Learning

Overview of Sales Machine Learning

Machine learning models recognize patterns in your data and make predictions using the attributes you select in the model. Your application comes with the Similar Accounts model, which recognizes similar accounts using attributes such as location, size, and industry. As a sales administrator without prior training in AI, you can use the Machine Learning feature to change the existing Similar Accounts model, and you can build machine learning models of your own.

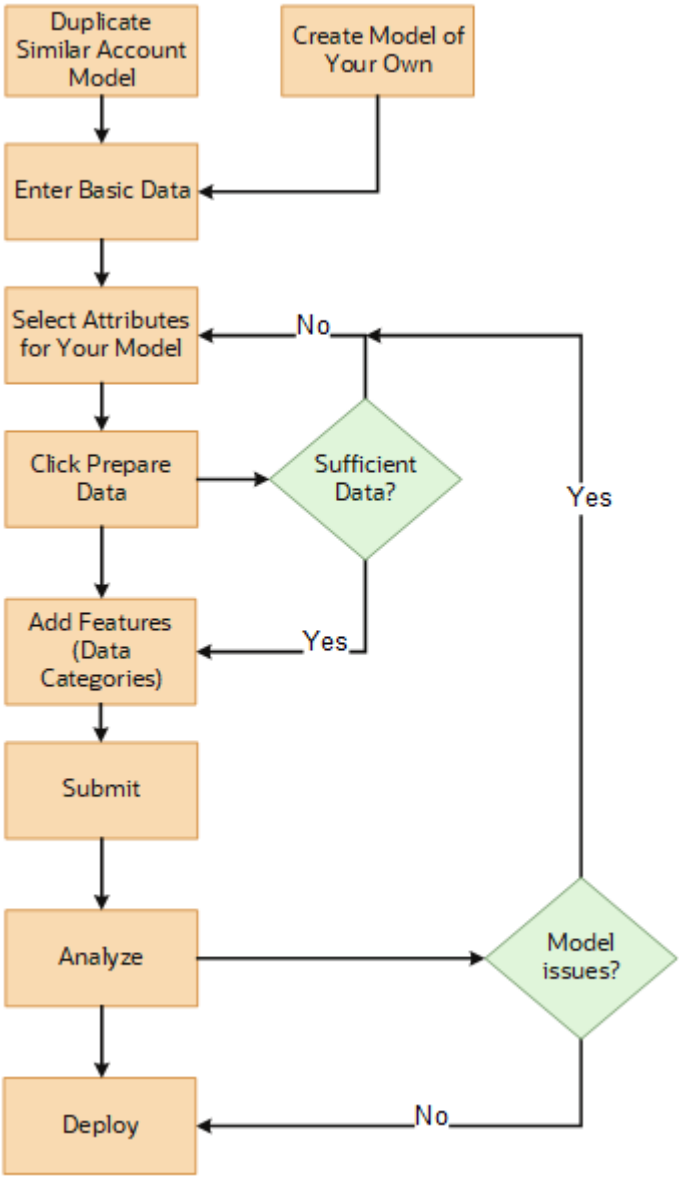
This table shows the setups that you need to complete to enable the Sales Machine Learning feature and show similar accounts on the Account pages of both Oracle Sales and classic Sales.

Step	Applies To	Description	Navigation	Where to Get More Details
1	Both Oracle Sales and classic Sales	Create and deploy the model either by copying the Similar Accounts model or creating one from scratch.	Open the Machine Learning Models page either from the last step in the Enable Sales Intelligence Features task. You can also search for the Configure Sales Machine Learning task using the Tasks search panel of the Setup and Maintenance work area.	See the topics: • *Overview of Building Machine Learning Models* • *Create a Similar Accounts Model* • *Create a Machine Learning Model from Scratch*
2	Classic Sales	If you copied the Similar Accounts model, the application displays similar accounts automatically in Oracle Sales when salespeople enter "Show similar accounts" in the Action Bar. For classic Sales, you must display the Similar Accounts in the UI using Application Composer.	Application Composer	See the topics in the section: Display Similar Accounts on the Account pages of CX Sales. *High-Level Setup Steps*

Overview of Building Machine Learning Models

Here's an overview of the high-level steps for building your machine learning models.

1. You've a choice of either duplicating the existing Similar Accounts model and changing the copy, or you can create a model of your own from scratch.
2. You add some basic information. If you're creating a model from scratch, you select the object and type of model you're building: either a prediction model or a model to identify similar records.
3. You select the attributes you want to use for your model.
4. You click **Prepare Data** to check if there's enough data for each attribute.
5. If your model results in the Error status, you don't have enough data for some attributes and you must select different attributes or fix the data.
6. If your model completes with the Prepared status, then you can add data categories for the different attributes in the Add Features step.
7. Click Submit to build the model.
8. Analyze the model results. You get tips on how to improve the model.
9. If the model needs improvement, you can go back to the previous steps to tweak it.
10. You can deploy the model to automatically run on a daily, weekly, or a monthly schedule.



Related Topics

- Create a Similar Accounts Model
- Create a Machine Learning Model from Scratch
- See Similar Accounts for an Account in Digital Sales

Navigate to the Machine Learning Models Page

You can open the Machine Learning Models page either from the last step in the Enable Sales Intelligence Features task or you can search for it using the Tasks search panel of the Setup and Maintenance work area.

1. In the Setup and Maintenance work area, select the **Sales** offering.

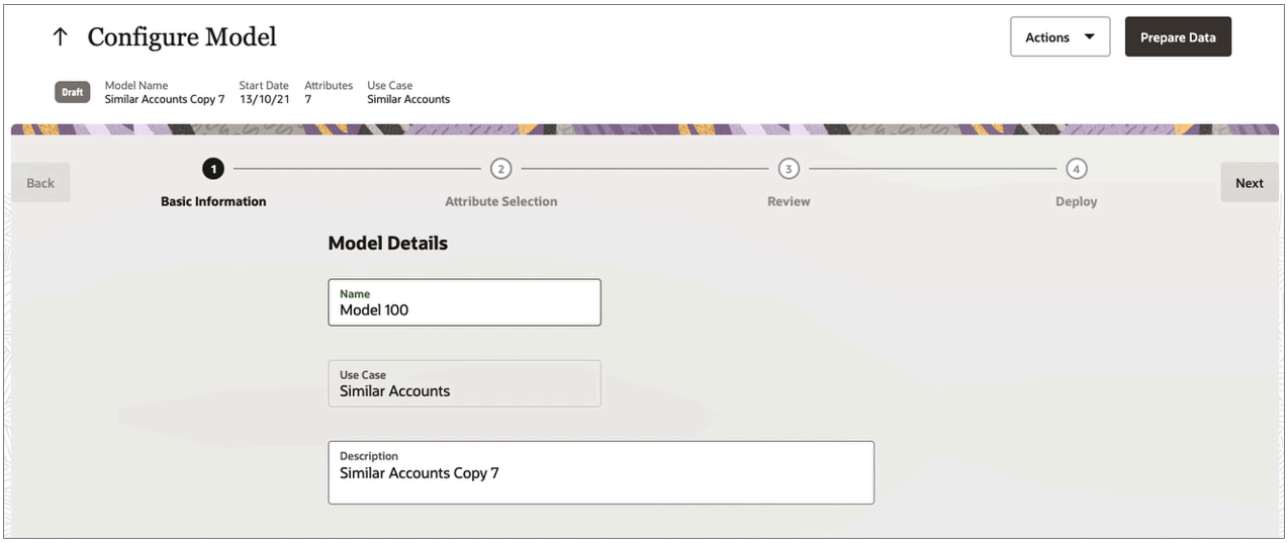
2. Click the **Tasks** side panel.
3. Click **Search**.
4. Search for the **Configure Sales Machine Learning** task and click the link.

Create a Similar Accounts Model

Here's how to create a similar accounts model of your own.

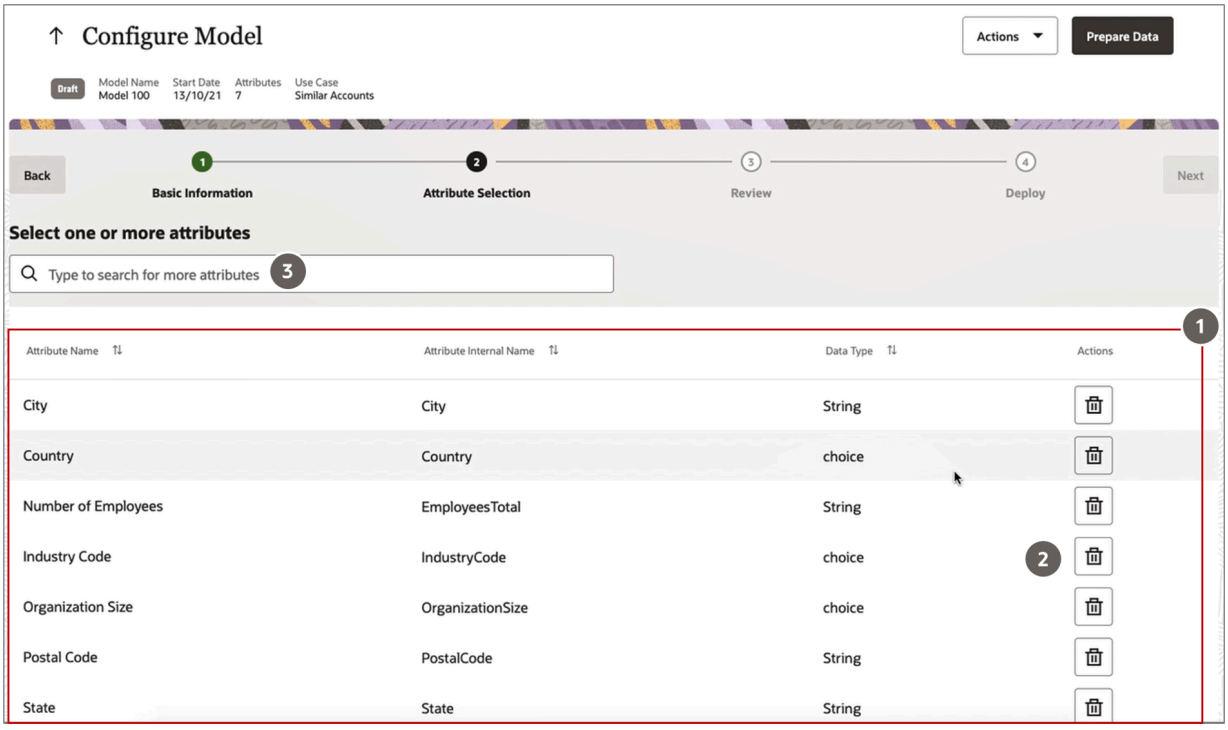
1. Navigate to the *Machine Learning Models page*.
2. On the Machine Learning Models page, click **Actions** (hamburger icon) and select **Duplicate** for the Similar Accounts model.

   Your action creates a copy of the predefined model in the Draft status.
3. In the Basic Information step, enter a name and description. They're visible only in the administration pages.



4. Click **Next**.

5. The Attribute Selection page lists the attributes for the model provided by Oracle (callout 1 in the screenshot below).



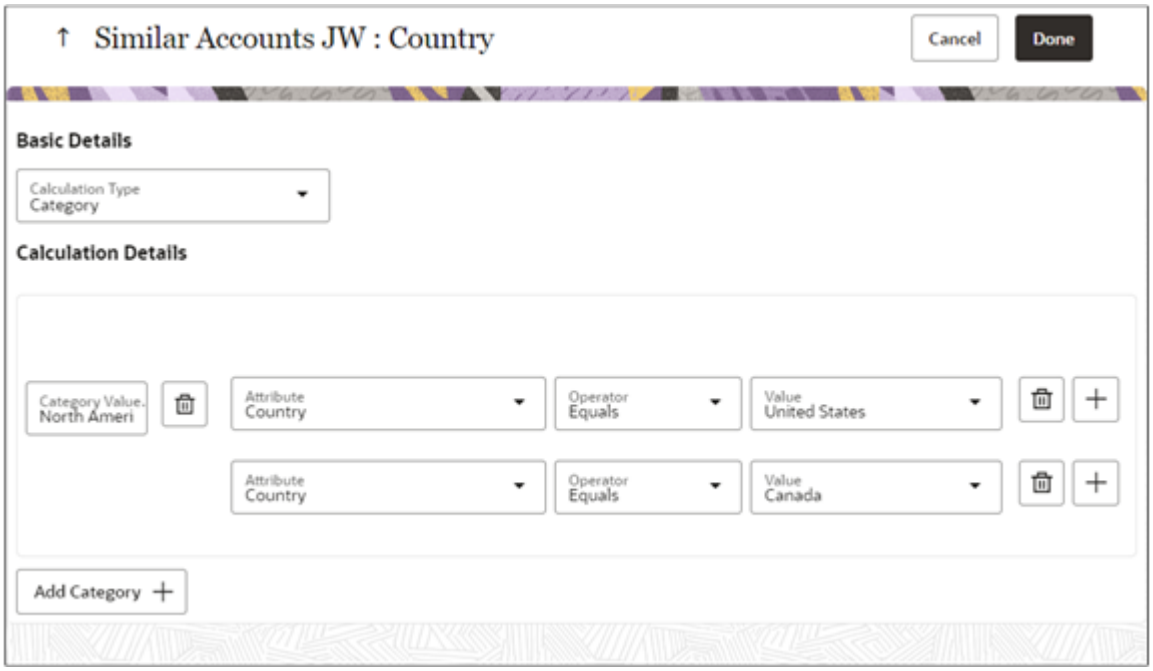
6. Add or delete account attributes you want the model to use. For example, the model provided by Oracle includes Postal Code as one of the attributes. Too many distinct values will make the model less useful and slow to run, so remove Postal Code if you're selling in multiple countries, for example.
    a. Use the delete icon (callout 2 in the screenshot above) to remove the attributes you don't need.
    b. Use the search field (callout 3 in the screenshot above) to add account attributes.
7. Click **Prepare Data** to validate if enough data exists to create a model from the attributes you selected.

    The **Status** column on the Machine Learning page shows the **Running** status while the validation process is running.
8. Click **Refresh** to check for status changes.
9. A status of **Error** means that you don't have enough data for some attributes you selected for your model. At least 30 percent of the records must have a value for the attribute. Here's what to do:
    a. Click the name link of your model.
    b. Click to the **Attribute Selection** step to see a list of the errors.
    c. Delete the attributes that you can't use.
    d. Click **Prepare Data** again.
10. If your model is in the **Prepared** status, you've enough data to analyze and tweak your model further.
11. Click the **Features** step.
12. Click **Actions** > **Edit** for any of the attributes to fine tune you model by categorizing the values.
13. On the Calculation Type page, you can provide one or more categories for the model to consider. Categories affect the way that the model learns and how it creates clusters of records. For example, if you find out that

your model has too many unique values for a particular attribute, you can come here and group them. Which calculation type is available depends on the attribute:

- **Age Date bucket**: Use this calculation type for date-time attributes such as Creation Date. You can define age groups, such as 0 to 1 year old, 1 to 2 years old, and 2 to 3 years old, instead of a date. Then, your model searches for similar accounts within the configured age groups.
- **Number bucket**: Use this calculation type for numeric attributes like Potential Revenue and Organization Size. For example, instead of searching by a deal amount, you can create number buckets of equal ranges, such as 0 to 100,000, and 100,000 to 200,000. Your model will search for similar accounts that have a deal amount within the configured number buckets.
- **Category**: You can use this calculation type to create categories based on attribute conditions. For example, you can categorize accounts by world regions, by grouping countries as Latin America, North America, Asia Pacific, and Europe. Or you can categorize accounts as Large, Medium, or Small, using Opportunity Revenue or Organization Size.

14. Here's how to classify the countries where you do business by geographical regions, for example:
    a. Click **Actions** > **Edit** for Country.
    b. From the **Calculation Type** list, select **Category**.
    c. In the **Category Value** field, enter **North America**.
    d. From the Operator list, select Equals
    e. In the Value field, search and enter one of the countries in North America.
    f. Click **Add Another Rule** (the plus sign) and add a second country.
    g. Repeat the process until you added all the countries in the category.
    h. Click **Add Category** to add more categories.
    i. Click **Done**.



15. When you're done adding calculation types, click **Submit** to run the model.
16. Click **Refresh** to refresh the status.
17. When the model status changes from **Running** to **Ready**, click **Actions** > **Edit**. The Actions menu is the hamburger icon on the right side of the page.

18. Click the **Review** step to review similar accounts the model finds for any account you select:
19. From the **Account** field, select an account to display the similar accounts predicted by the model.
20. Click **Analyze** to review information about your model on the Analysis Report page.
21. The report includes tips on how you can improve the model. For example, the report can tell you that some fields have too few unique values and that others have too many.

    If a field has too few values, you'll need to either import more data or eliminate that attribute from the model. If there are too many values, you'll need to group them into categories on the Features step.

    Here's some other useful information:

    - **Algorithm Selected**: The algorithm that was run for your model. You can't change the algorithm, so you can ignore this field.
    - **Model Accuracy**: Shows the accuracy of your model as a percentage. A good model accuracy is above 90 percent. If the value is less, change the attributes to improve the accuracy.
    - **Number of Clusters**: Number of account groupings in your model. The more clusters that you've in your model, the fewer similar accounts that you get. About 20 clusters is a good number.
    - The **Data Analysis** tab shows you the number of distinct values for each attributes and the percent empty values, for example.
    - The **Model Analysis** tab shows the number of clusters and a pie chart of their distribution.
22. Click **Next**.
23. On the Deploy page: enter the date and time that you want to start running the m and recurrence.
    a. **Date and Time**: Enter the date and time that you want to start the schedule from.
    b. **Recurrence**: Set the frequency for rebuilding your model, depending on how often your data changes.
        - **Daily**
        - **Weekly**
        - **Monthly**
24. Click **Deploy**.

    Your model is now active.

    > **Note:** Only one model can be active at a time. If you already have an active model, you must confirm that you want to replace it.

Create a Machine Learning Model from Scratch

You can create a machine learning model completely from scratch. You can use the model to either predict similar records or predict outcomes for accounts, contacts, opportunities, and sales leads.

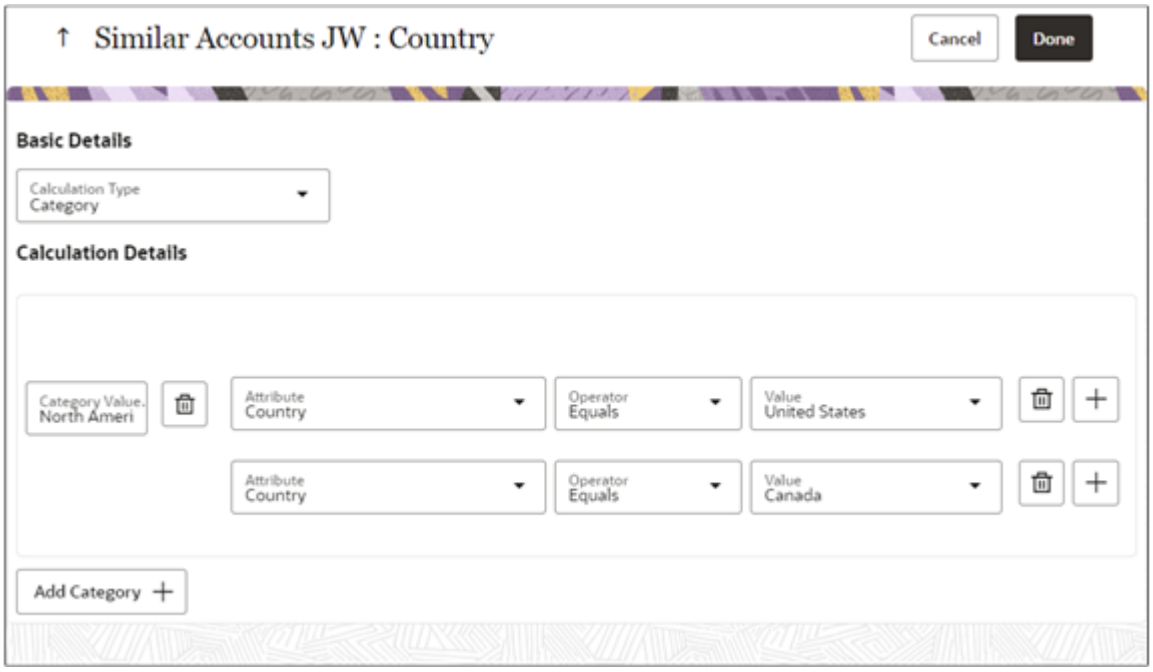
Creating a model from scratch involves additional setup in the Basic Information step. Otherwise the process is the sames as for creating a similar accounts model from the one provided by Oracle.

1. Navigate to the *Machine Learning Models page*.
2. On the Machine Learning Models page, click **Create**.
3. In the Basic Information step, enter the following:
    - Model name
    - Name of the use case the model covers
    - Optional description

4. Select an object. Options are:
    - Account
    - Contact
    - Opportunity
    - Sales Lead
5. Select the model type, either **Identify Similar Records** or **Predict Outcome**.
6. If you selected **Predict Outcome**, then select the attribute you want to predict. For example, if you want to predict that an opportunity results in an order, then select Order.
7. Select the records that you want to include in the data set.
8. Click **Next**.
9. On the Attribute Selection page, add the attributes you want to use in the model.
10. Click **Prepare Data** to validate if sufficient data exists to create a model from the attributes you selected.

    The **Status** column on the Machine Learning page shows the **Running** status while the validation process is running.
11. Click **Refresh** to check for status changes.
12. A status of **Error** means that you don't have sufficient data for some of the attributes you selected for your model. At least 30 percent of the records must have a value for the attribute. Here's what to do:
    a. Click on the name link of your model.
    b. Click to the **Attribute Selection** step to see a list of the errors.
    c. Delete the attributes that you can't use.
    d. Click **Prepare Data** again.
13. If your model is in the **Prepared** status, you have sufficient data to analyze and tweak your model further.
14. Click the **Features** step.
15. Click **Actions** > **Edit** for any of the attributes to fine tune you model by categorizing the values.
16. On the Calculation Type page, you can provide one or more categories for the model to consider. Categories affect the way that the model learns and how it creates clusters of records. For example, if you find out that your model has too many unique values for a particular attribute, you can come here and group them. Which calculation type is available depends on the attribute:
    - **Age Date bucket**: Use this calculation type for date-time attributes such as Creation Date. You can define age groups, such as 0 to 1 year old, 1 to 2 years old, and 2 to 3 years old, instead of a date. Then, your model searches for similar accounts within the configured age groups.
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    - **Category**: You can use this calculation type to create categories based on attribute conditions. For example, you can categorize accounts by world regions, by grouping countries as Latin America, North America, Asia Pacific, and Europe. Or you can categorize accounts as Large, Medium, or Small, using Opportunity Revenue or Organization Size.
17. Here's how to classify the countries where you do business by geographical regions, for example:
    a. Click **Actions** > **Edit** for Country.
    b. From the **Calculation Type** list, select **Category**.
    c. In the **Category Value** field, enter **North America**.
    d. From the Operator list, select Equals
    e. In the Value field, search and enter one of the countries in North America.
    f. Click **Add Another Rule** (the plus sign) and add a second country.
    g. Repeat the process until you added all the countries in the category.

h. Click **Add Category** to add additional categories.
i. Click **Done**.



18. When you are done adding calculation types, click **Submit** to run the model.
19. Click **Refresh** to refresh the status.
20. When the model status changes from **Running** to **Ready**, click **Actions** > **Edit**. The Actions menu is the hamburger icon on the right side of the page.
21. Click the **Review** step to review similar accounts the model finds for any account you select:
22. From the **Account** field, select an account to display the similar accounts predicted by the model.
23. Click **Analyze** to review information about your model on the Analysis Report page.
24. The report includes tips on how you can improve the model. For example, the report can tell you that some fields have too few unique values and that others have too many.

    If a field has too few values, you'll need to either import more data or eliminate that attribute from the model. If there are too many values, you'll need to group them into categories on the Features step.

    Here's some other useful information:

    - **Algorithm Selected**: The algorithm that was run for your model. You can't change the algorithm, so you can ignore this field.
    - **Model Accuracy**: Shows the accuracy of your model as a percentage. A good model accuracy is above 90 percent. If the value is less, change the attributes to improve the accuracy.
    - **Number of Clusters**: Number of account groupings in your model. The more clusters that you have the fewer similar accounts that you get. About 20 clusters is a good number.
    - The **Data Analysis** tab shows you the number of distinct values for each attributes and the percent empty values, for example.
    - The **Model Analysis** tab shows the number of clusters and a pie chart of their distribution.
25. Click **Next**.
26. On the Deploy page: enter the date and time that you want to start running the m and recurrence.

a. **Date and Time**: Enter the date and time that you want to start the schedule from.
b. **Recurrence**: Set the frequency for rebuilding your model, depending on how often your data changes.
   - **Daily**
   - **Weekly**
   - **Monthly**

27. Click **Deploy**.

Your model is now active.

> **Note:** Only one model can be active at a time. If you already have an active model, you must confirm that you want to replace it.

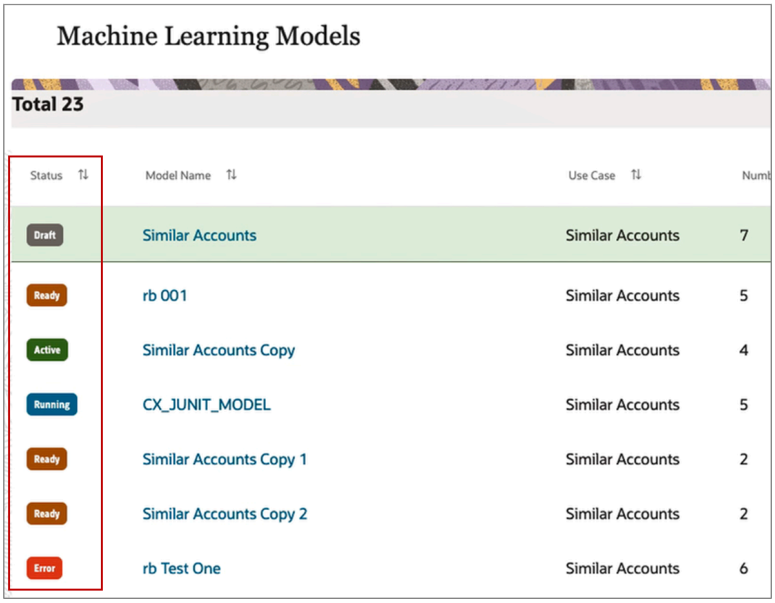
Model Statuses

This table describes the stages a model goes through and the corresponding statuses it displays while going through them:

Scenario	Status
You create a copy from an existing model, enter basic details, and save. The model appears in the list.	The model is saved as a Draft.
You add attributes and save the model.	The model is saved as a Draft.
You click **Prepare Data** to validate the attributes. The engine triggers a model run.	Whenever the engine prepares the data or builds the model, the status shows Running.
If the run is successful...	The status changes from Running to Draft.
If the run failed...	The status changes from Running to Error.
You get the status as Error when the attributes you select don't have enough data. Review and change the attributes. Click **Prepare Data** to run the model process again. Result: The run is successful.	Status changes from Running to Draft.
The engine prepares the data. You now want to build the model. You open the model and click **Submit**.	Status changes from Running to Ready.
Your model is now ready for deployment. Although you can have many models in the Ready status, you can deploy only one of them at any give time. Review the model, enter the deploy schedule, and click **Deploy**.	Status changes from Ready to Active. Your sales team can see the similar accounts based on the similarity identified by the active model.

Scenario	Status
You want to retire an active model. Click **Retire** from **Actions** (the hamburger icon). A confirmation message appears that the deploy schedule of the model will be deleted.	Status changes from Active to Ready.
You want to delete a model. • To remove an active model, you need to retire the model first and delete it. ○ Click **Retire** from **Actions** (the hamburger icon). ○ After the model status reverts to Ready, click **Delete** from **Actions**. • To remove an inactive model, click **Delete** from **Actions**.	The engine removes the model permanently from the list view and the Digital Sales database.

Here's a screenshot of the Machine Learning models list. It shows about seven similar account models that are in various statuses such as Draft, Ready, Running, and Error. While many models can exist in the Draft and Ready statuses, only one of them can be active. The model statuses are also indicated in different colors. For example, the Error status is shown in a red box, the Running status is shown in blue, and Active is shown in green.



Display Similar Accounts on the Account Pages of CX Sales

High-Level Setup Steps

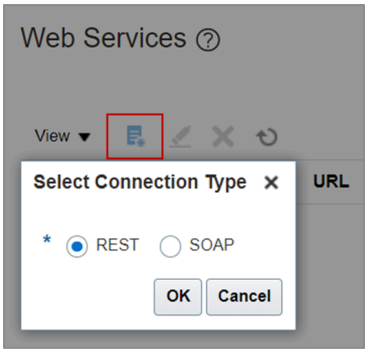
Here's a summary of the setups you need to make to display Similar Accounts in the classic Sales account pages. No setup is required to make Similar Accounts display in Oracle Sales UIs.

1. Create a REST web service for Similar Records.
2. Create a REST web service for GET Account.
3. Create a global function for `invokeSalesMLSimilarRecordsQuery` API.
4. Use Formula fields to create a similar accounts field.
5. Add the similar accounts field to the Account landing page layout.

Create a REST Web Service for Similar Records API

Here's how you create a REST Web Service for Similar Records API:

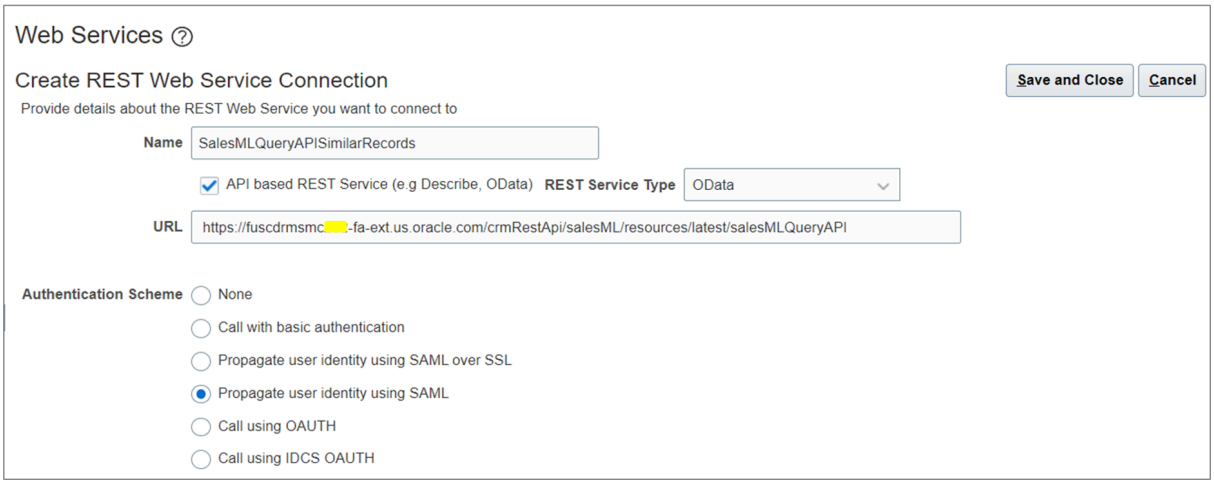
1. Enter an active sandbox. From the navigator, go to **Configurations** > **Application Composer** > **Common Setup** > **Web Services**.
2. On the Web Services page, click the new web service icon.
3. On the Select Connection Type window, select **REST** and click **OK**.



4. On the Create REST Web Service Connection page, enter a **Connection Name**. For example, `SalesMLQueryAPISimilarRecords`.

   Ensure that you use same connection name in Global Function Groovy as well. See the **Create a Global Function for SalesMLQueryAPI Similar Records** section in this topic.
5. Leave the **API-based REST Service** checkbox blank.
6. Select **OData** for REST Service Type.
7. Enter a **URL** in the format, `https://<host>/crmRestApi/salesML/resources/latest/salesMLQueryAPI` For example, `https://fuscdrmsmcxxx-fa-ext.oracle.com/crmRestApi/salesML/resources/latest/salesMLQueryAP`.
8. Select any of these values for **Authentication Scheme**:
   - Call with Basic Authentication.
   - Propagate user identity using SAML.
   - Propagate user identity using SAML over SSL.

   Here's a screenshot of the Create REST Web Service Connection page. The page shows the API name, REST service related settings selected, and a sample URL entered.



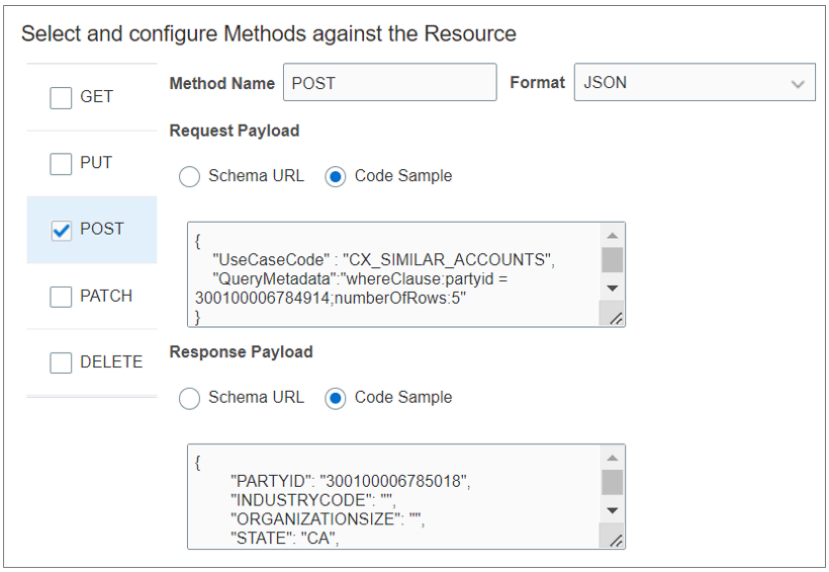
9. Next, enter information in the Select and Configure Methods against the Resource section:
   a. Select the **POST** checkbox.
   b. Let the **Method Name** be POST and **Format** be JSON.
   c. Select Code Sample for **Request Payload** and enter this code into the text field:

```
{
 "UseCaseCode" : "CX_SIMILAR_ACCOUNTS",
 "QueryMetadata":"whereClause:partyid = 300100006784914;numberOfRows:5"
}
```

   d. Select Code Sample for **Response Payload** and enter this code into the text field:

```
{
 "PARTYID": "300100006785018",
 "INDUSTRYCODE": "",
 "ORGANIZATIONSIZE": "",
 "STATE": "CA",
 "COUNTRY": "US",
 "POSTALCODE": "94065",
 "CITY": "Redwood Shores",
 "EMPLOYEESTOTAL": "1",
 "PROB": "0.8740334165546894",
 "CLUSTER_ID": "370",
 "RNK_CLUS2": "6"
```

}



10. Click **Save and Close**.

    The application creates a web service for the similar records API.

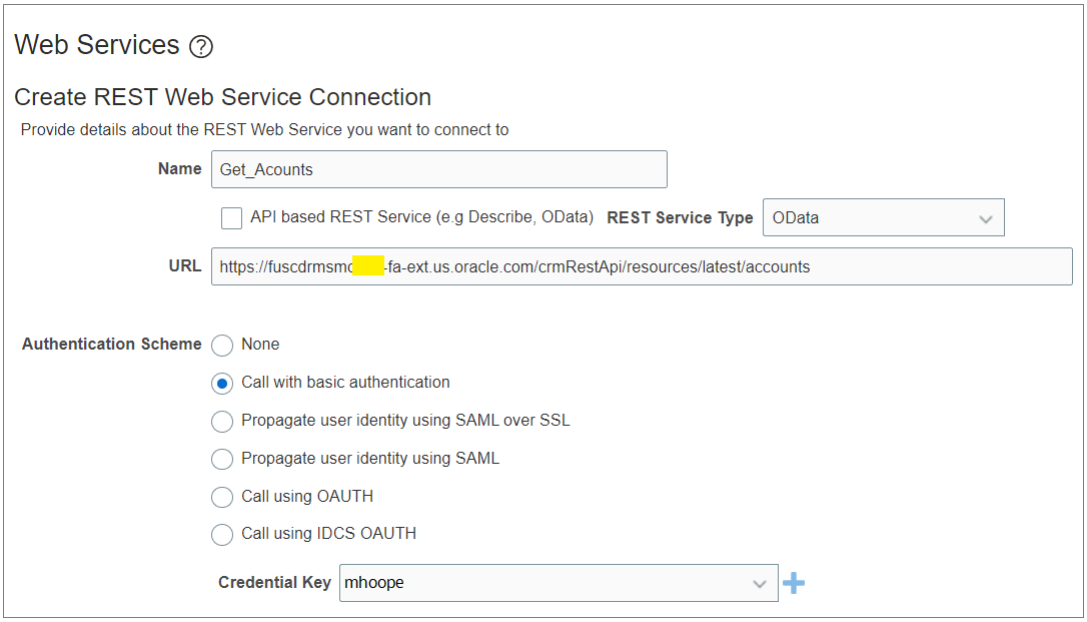
Create a REST Web Service for GET Account API

After creating the Similar Accounts REST web service, create another REST web service for GET Account API. Here's how you create it:

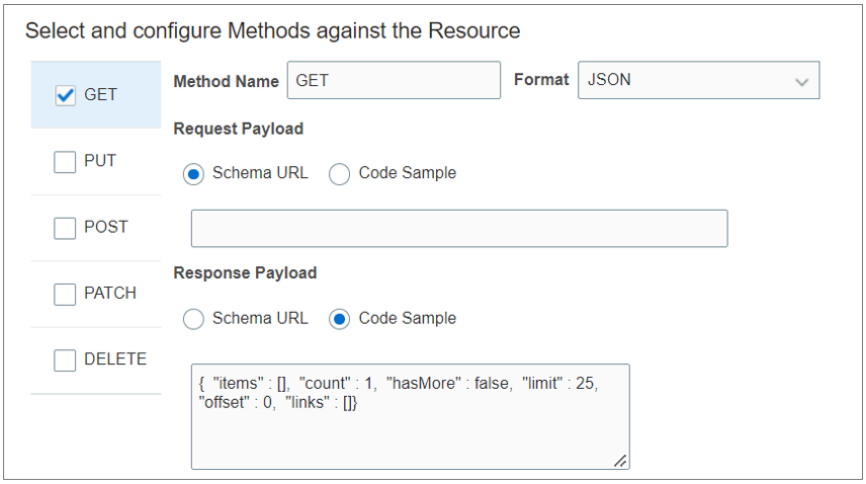
1. On the Web Services page, click the new web service icon.
2. On the Select Connection Type window, select REST and click **OK**.
3. On the Create REST Web Service Connection page, enter a **Connection Name**. For example, GET_Accounts.

   Ensure that you use same connection name in Global Function Groovy. See the Create a Global Function for SalesMLQueryAPI Similar Records section in this topic.
4. Leave the **API-based REST Service** checkbox blank.
5. Select **OData** for REST Service Type.
6. Enter a URL in the format, `https://<host>/crmRestApi/resources/latest/accounts`. For example, `https://fuscdrmsmcxxx-fa-ext.oracle.com/crmRestApi/resources/latest/accounts`.
7. Select Call with Basic Authentication for **Authentication Scheme**.

8. Add your **Credential Key**.



9. Next, enter information in the Select and Configure Methods against the Resource section:
   a. Select the **GET** checkbox.
   b. Let the **Method Name** be GET and **Format** be JSON.
   c. Leave **Request Payload** blank.
   d. Select Code Sample for **Response Payload** and enter the following code into the text field: `{ "items" : [], "count" : 1, "hasMore" : false, "limit" : 25, "offset" : 0, "links" : []}`



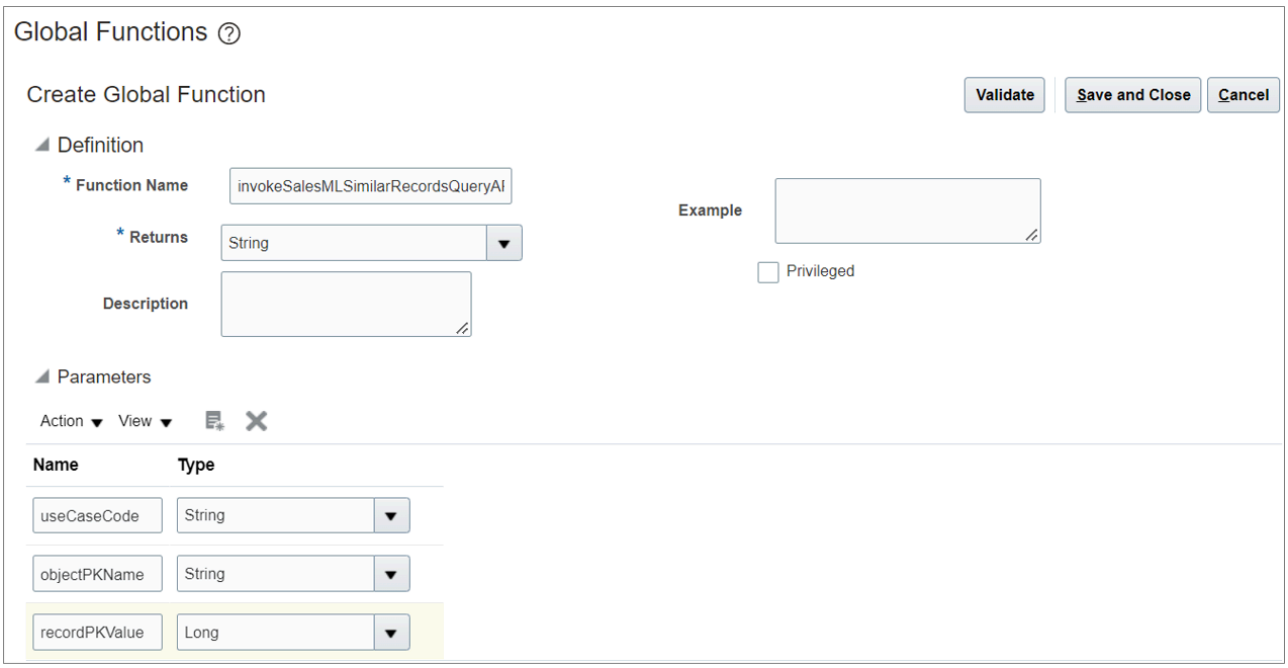
10. Save and close.

Create a Global Function for salesMLQuerySimilarRecords API

Here's how you create a global function for the `salesMLQuerySimilarRecords` API:

1. Continue in the active sandbox and navigate to **Configurations** > **Application Composer** > **Common Setup** > **Global Functions**.
2. Click the global function icon.
3. On the Create Global Function page, enter a **Function Name**. For example, `invokeSalesMLSimilarRecordsQueryAPI`.

   Ensure that you use same global function name in the Groovy for the formula type field.
4. Select String for **Returns**.
5. Add these parameters:
   - **Name**: `useCaseCode` **Type**: String.
   - **Name**: `objectPKName` **Type**: String.
   - **Name**: `recordPKValue` **Type**: Long (Integer).



6. Add this Groovy code in the Edit Script field:

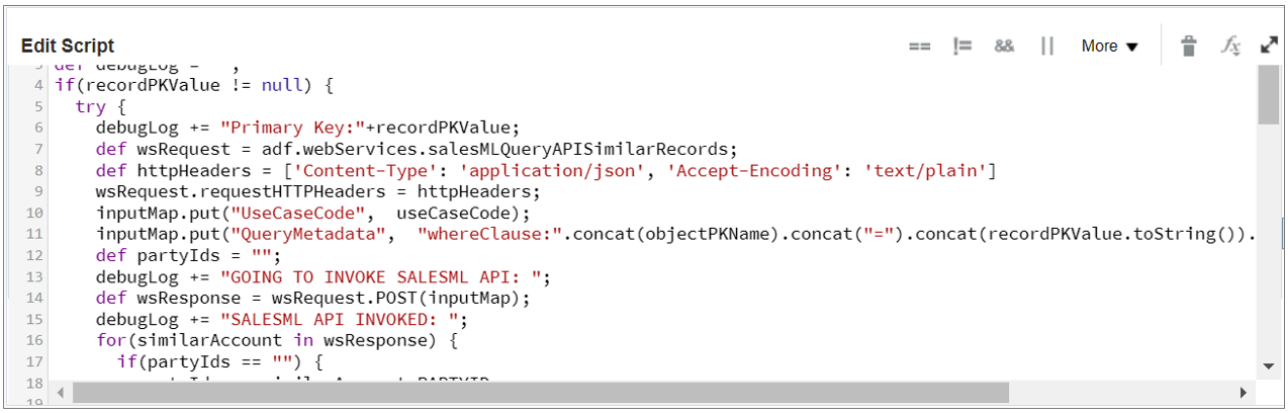
```
def inputMap = [:];
def accountNames = "";
def debugLog = "";
if(recordPKValue != null) {
 try {
 debugLog += "Primary Key:"+recordPKValue;
 def wsRequest = adf.webServices.salesMLQueryAPISimilarRecords;
 def httpHeaders = ['Content-Type': 'application/json', 'Accept-Encoding': 'text/plain']
 wsRequest.requestHTTPHeaders = httpHeaders;
 inputMap.put("UseCaseCode", useCaseCode);
 inputMap.put("QueryMetadata",
 "whereClause:".concat(objectPKName).concat("=").concat(recordPKValue.toString()).concat(";numberOfRows:5"));
 def partyIds = "";
 debugLog += "GOING TO INVOKE SALESML API: ";
```

```
 def wsResponse = wsRequest.POST(inputMap);
 debugLog += "SALESML API INVOKED: ";
 for(similarAccount in wsResponse) {
 if(partyIds == "") {
 partyIds += similarAccount.PARTYID;
 } else {
 partyIds += ","+similarAccount.PARTYID;
 }
 }
 if(partyIds != "") {
 debugLog += "START ACCOUNTS GET PREP: ";
 def wsRequest2 = adf.webServices.Acconts_GET;
 def httpHeaders2 = ['REST-Framework-Version': '2'];
 wsRequest2.requestHTTPHeaders = httpHeaders2;
 def queryParams = ['q':'PartyId IN ('+partyIds+')'];
 wsRequest2.dynamicQueryParams = queryParams;
 debugLog += "GOING TO INVOKE ACCOUNTS GET: ";
 def accounts = wsRequest2.GET();
 debugLog += "INVOKED ACCOUNTS GET: ";
 def count = 0;
 for(account in accounts.items) {
 if(count == 0) {
 accountNames += account.OrganizationName;
 } else {
 if(count<5){
 accountNames += ",\n"+account.OrganizationName;
 } else {
 break;
 }
 }
 count++;
 }
 }
 } catch (e) {
 debugLog += e.getMessage();
 accountNames = debugLog;
 }
} else {
 accountNames = "Not Available";
}

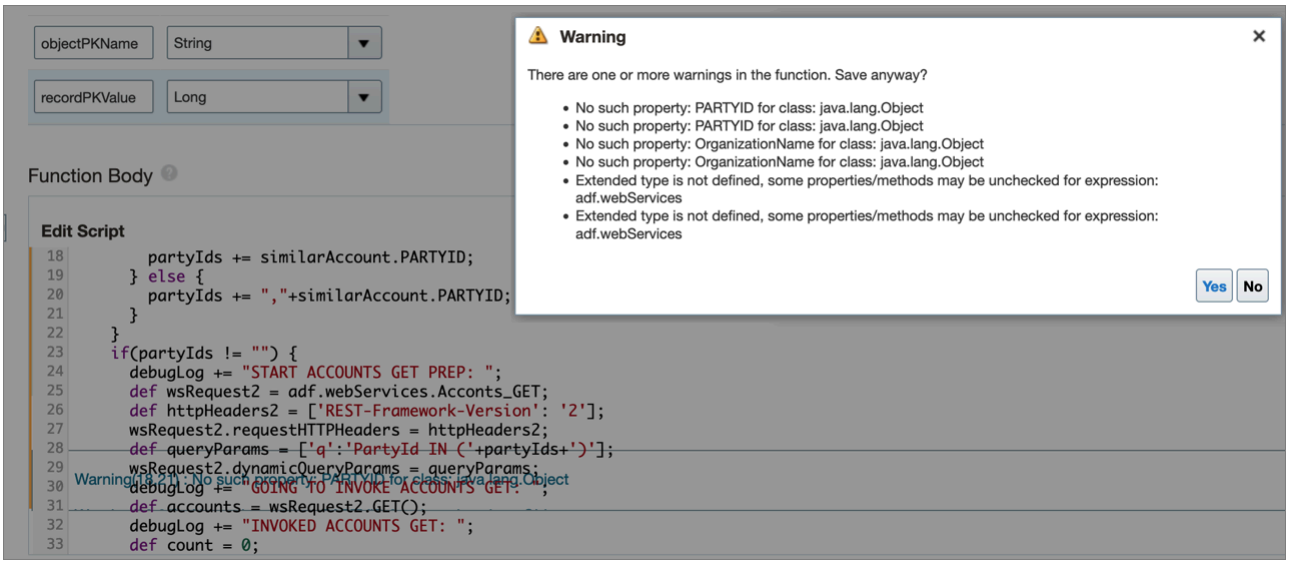
if(accountNames == "") {
 accountNames = "Not Available";
}

return accountNames;
```

7. Click **Validate**.



8. Click **Save and Close**.
The Groovy might show some warnings. Ignore those warnings and click **Yes** to save the script.



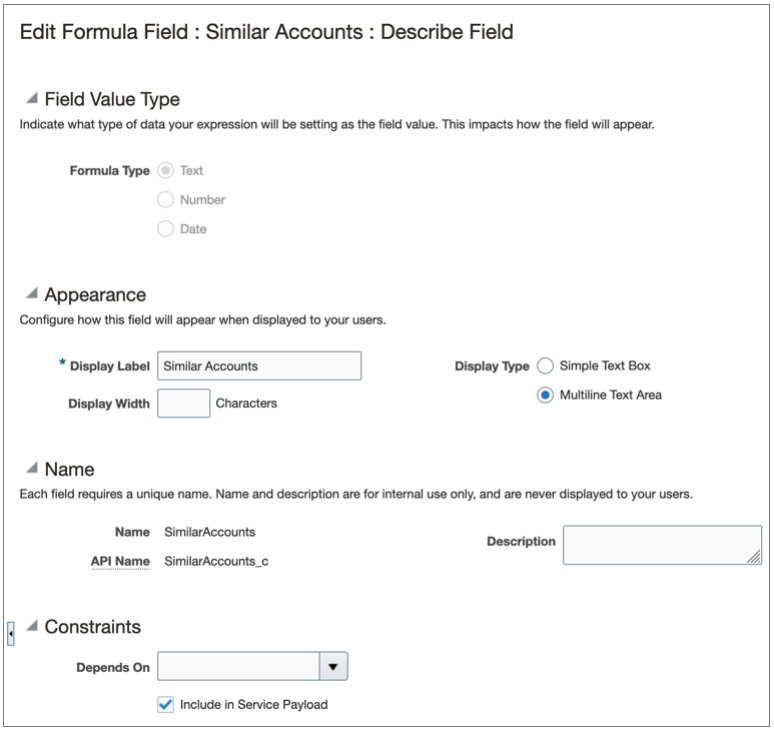
Use a Formula Field to Render a Similar Accounts Field

Create a multiline text formula field to show the similar accounts you get from the model. Here's how you create the field:

1. Enter an active sandbox.
2. Navigate to **Configuration** > **Application Composer** > **Standard Objects** > **Account** > **Fields**.
3. On the Fields page, click **Actions** > **Create**.
4. Select **Formula** and click **OK**.
To learn more about the formula fields, read the *Formula Fields* topic in the Configuring Applications Using Application Composer guide.
5. On the Create Formula Field page, enter a **Display Label**. Enter the same name but without spaces, in the **Name** field.

6. Select **Display Type** as Multiline Text Area.

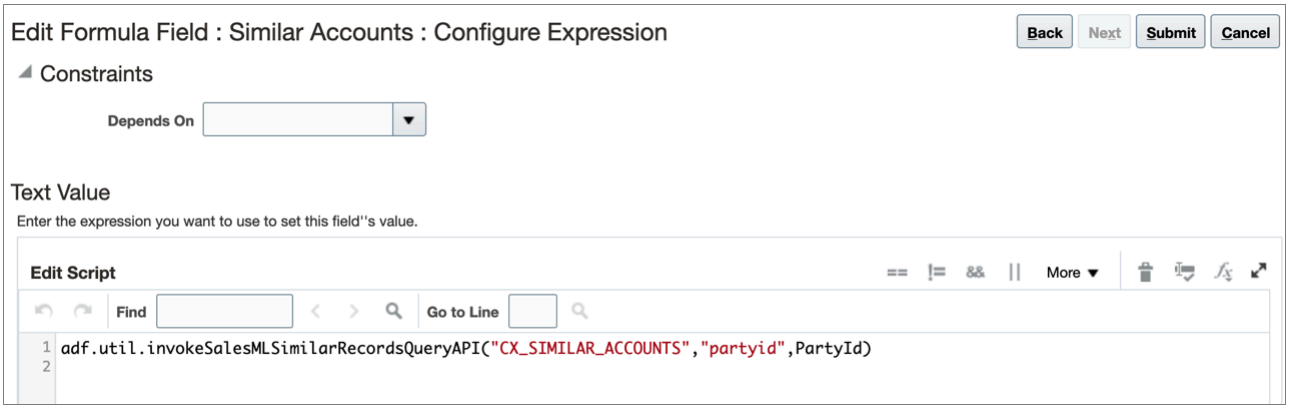
   The formula field will appear as a multiline text area to display the similar accounts.



7. Click **Next**.
8. On the Configure Expression page, enter the formula value in the following format:

```
adf.util.InvokeSalesMLQueryAPI("<Prediction Model Usecase
 Code>","<Primary Key Field Name>",<Primary
 Field Value>)
```

   For example, `adf.util.invokeSalesMLSimilarRecordsQueryAPI("CX_SIMILAR_ACCOUNTS","partyid",PartyId).`



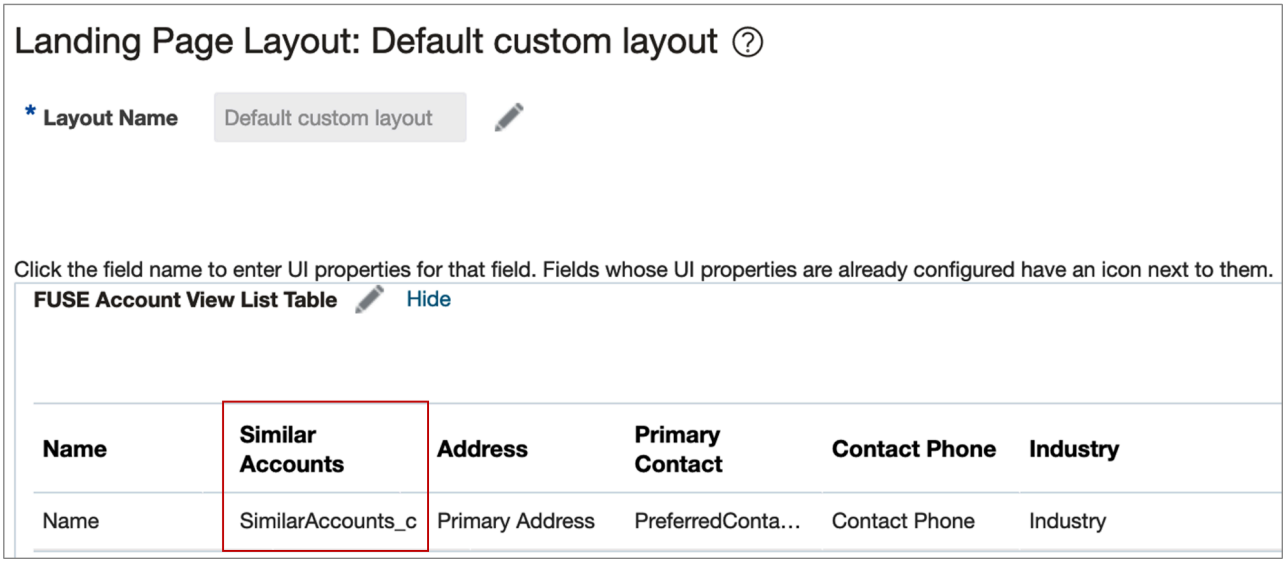
9. Click **Submit**.

   You can now add the similar account field to an object page.

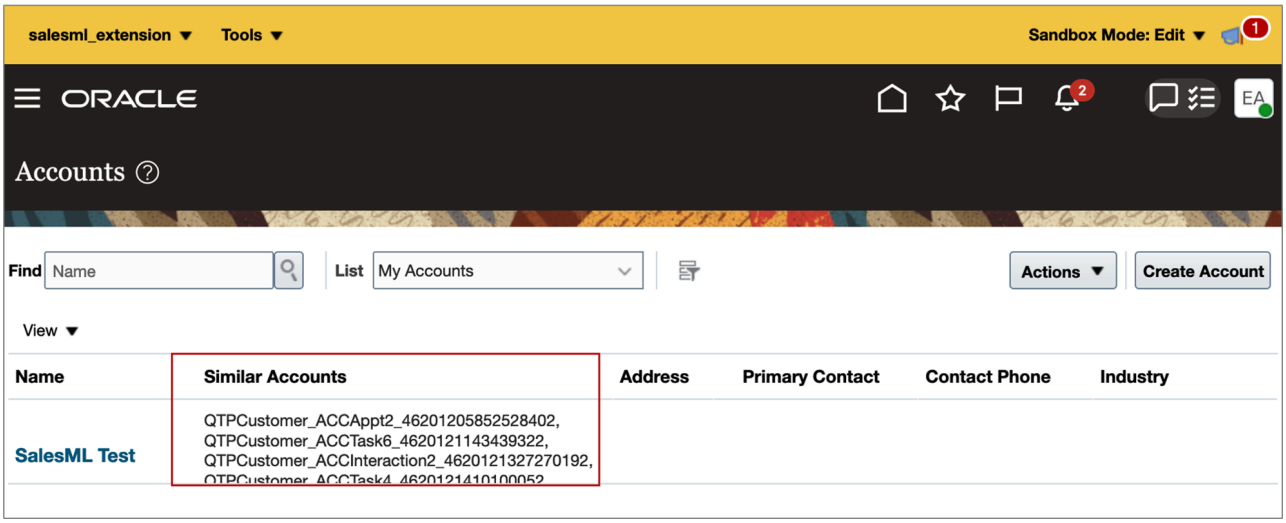
Add the Field to the Landing Page Layout

Add the multiline text formula field you created, to the landing page so that similar account results render in that field. Here's how you add:

1. Enter an active sandbox.
2. Navigate to **Configuration** > **Application Composer** > **Standard Objects** > **Account** > **Pages** > **Application Pages** > **Landing Page Layouts**.
3. Create a copy of the Landing Page layout and add the Similar Accounts formula field you created.
4. Save your changes.



At the end of the configuration, you can see the similar accounts showing up on the Accounts page.



Sales Insights

Overview of Sales Insights

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

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

Identifying those accounts, leads, and opportunities that are either highly or moderately engaged and by observing certain accounts helps salespeople:

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

Here are the UI paths for salespeople to access Sales Insight details:

- Accounts: Use the Profile tab on the Accounts page
- Leads: Use the Summary tab on the Edit Lead page
- Opportunities: Use the Summary tab on the Edit Opportunity page

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

Sales data is mined, evaluated and analyzed through data analytical and statistical modules. Adaptive search finds key metrics, calculate standard deviations, averages, and margins to deliver insights. Standard query language programs

sorts and classifies the data so that key sales metrics are readily available to salespeople to help them focus on those records that need attention.

Enable Sales Insights

Sales Insights data is mined, evaluated, and analyzed through data analytical and statistical modules. Adaptive Search finds key metrics and calculates standard deviations, averages, and margins to deliver insights.

You can also enable sales recommendations for Sales Insights for the Redwood User Experience. The sales recommendation feature analyzes text of notes and call logs and recommends follow-up tasks and appointments. When enabled, this feature replaces the automatic creation of a task after call wrap ups. See *Enable Sales Recommendations* for more information.

You enable the feature using the opt-in task. If you've permission to configure offerings, then you can use the New Features page to opt in to Sales Insights feature:

1. Click **Navigator** > **My Enterprise** > **Offerings** work area.
2. On the Offerings page, select the Sales offering.
3. Click **Change Feature Opt In**.
4. For the Sales root node, click the edit link (pencil icon).
5. From the Edit Features page, find Sales Insights and select the checkbox in the **Enable** column.
6. On the Opt In page, click **Done** to save the changes and return to the Offerings page.

For more information, see the New Feature Opt-In section of the Oracle Applications Cloud - Using Functional Setup Manager guide on the Oracle Help Center (docs.oracle.com).

Next, you must schedule Sales Insights data processes. For instructions about how to schedule the jobs, see the related links.

You must have the following privileges to work with Sales Insights and run these processes:

- ZCA_VIEW_SALES_INSIGHTS_PRIV
- ZCA_SALES_INSIGHTS_JOB_PRIV
- FUSION_APPS_CRM_ESS_APPID

Process	Frequency
Generate Sales Insight Metrics	Once a week
Generate Sales Insight Facts	Once a week
Generate Sales Insight Facts Using Signals	Daily
Purge Redundant Sales Insight Facts	Once a month

You must ensure that both the **Generate Sales Insight Facts Using Signals** and the **Generate Sales Insight Facts** onboarding processes for the insights features have fully completed with a successful data sufficiency status of **Sufficient**.

Here are the high level steps that needs to be done to ensure you enable and get access to sales insights.

Note: The Employee (Abstract Role) is required to view Sales Insights.

1. Sign in to Oracle CX Sales using Administrator role.
2. In the Setup and Maintenance work area, go to the following:
    - Offering: Sales
    - Functional Area: Intelligence in Sales
    - Task: Enable Sales Intelligence
3. From the **Enable Sales Intelligence Features** page, click **Start** and select the features you want.

    When you've selected the features, a message will display that an eligibility report will run and the application will close. Wait to receive a confirmation email before proceeding.
4. Once you receive the confirmation email, navigate to the **Enable Sales Intelligence** again as per step 2.
5. Click **Resume** to display the **View Features Eligibility Report**.

    This report lists the thresholds and data usage of factors that contribute to the overall data sufficiency for each of the sales intelligence features selected.
6. Expand the report and make sure the data for your enabled insight feature is sufficient and that the **Overall Status** contains the **Sufficient** value.

    The overall status can contain one of these values for the sales intelligence feature:

    - Insufficient : Your application has insufficient data to analyze and activate the feature
    - Emerging : Your application has some data to analyze but that isn't sufficient to activate the feature
    - Sufficient : Your application has sufficient data to analyze and activate the feature.
7. From the **Verify Recommended Features** section, select all the features that you require.
8. Click **Continue**.
9. Click **Done**.

Note: To support opt in with custom layouts for the Account, Lead, and Opportunity objects, you must go to Application Composer and click **Show** in the Sales Insights section for your custom layout object. See the Enable Sales Insights for Custom Layouts section in this topic for more details.

Enable Sales Insights for Custom Layouts

Here are the steps to display the Sales Insights section for a custom account layout page. You can also follow similar steps to show the Sales Insights section for custom sales lead and opportunity layout pages.

Note: When you first enable Sales Insights for a business or custom object, then all other objects that support the Sales Insights feature are automatically enabled and ready for use.

1. Ensure you're working in an active sandbox.
2. Click **Navigator** > **Configuration** > **Application Composer**.
3. In the Objects navigation tree, expand **Standard Objects** and then expand the object whose pages you want to change. For example, select the **Account** object.

> **Note:** Select the **Sales Lead** object to display Sales Insights section for the leads UI and select **Opportunity** object to display Sales Insights section for the opportunities UI.

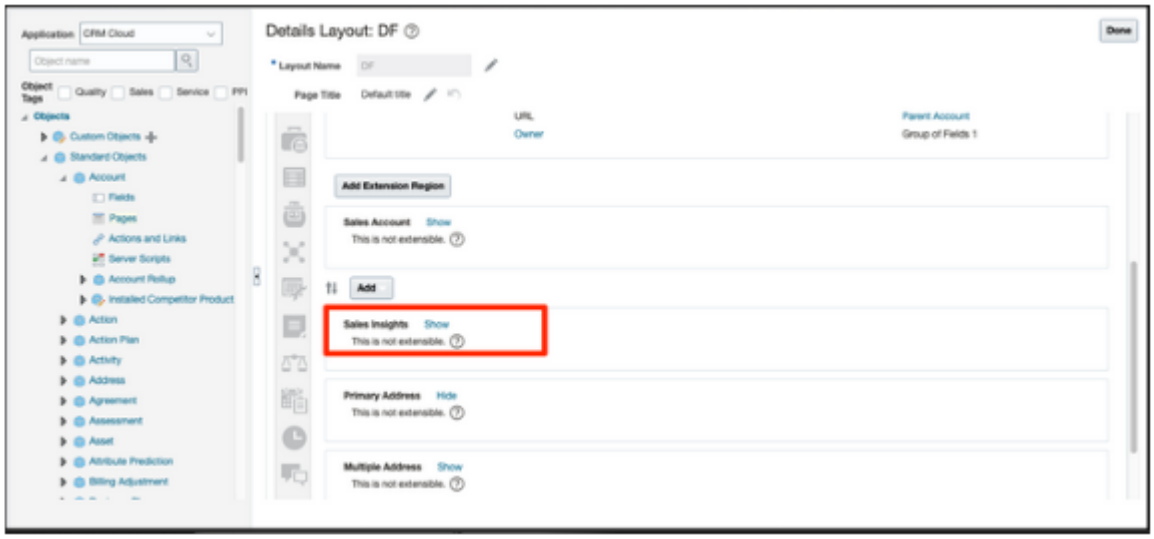
4. Click the **Pages** node.
5. Ensure that the **Application Pages** tab is selected for either the account, contact, household, or partner object.
6. In the Details Page Layouts region, edit the relevant layout.

   If none exists, then duplicate the standard layout using the duplicate layout icon, and edit the resulting layout.
7. In the Details Layout page for Account, click the **Profile** tab.

> **Note:** Click the **Summary** tab if you're displaying the Sales Insights section for leads and opportunities.

8. In the Sales Insights region for the selected object, click **Show** to show the Sales Insights region at runtime.

   Here's an example screen shot for the Account object.



9. Click **Save and Close**, then **Done**.
10. Publish the sandbox according to your company's business practices.

Related Topics

- Submit Scheduled Processes and Process Sets